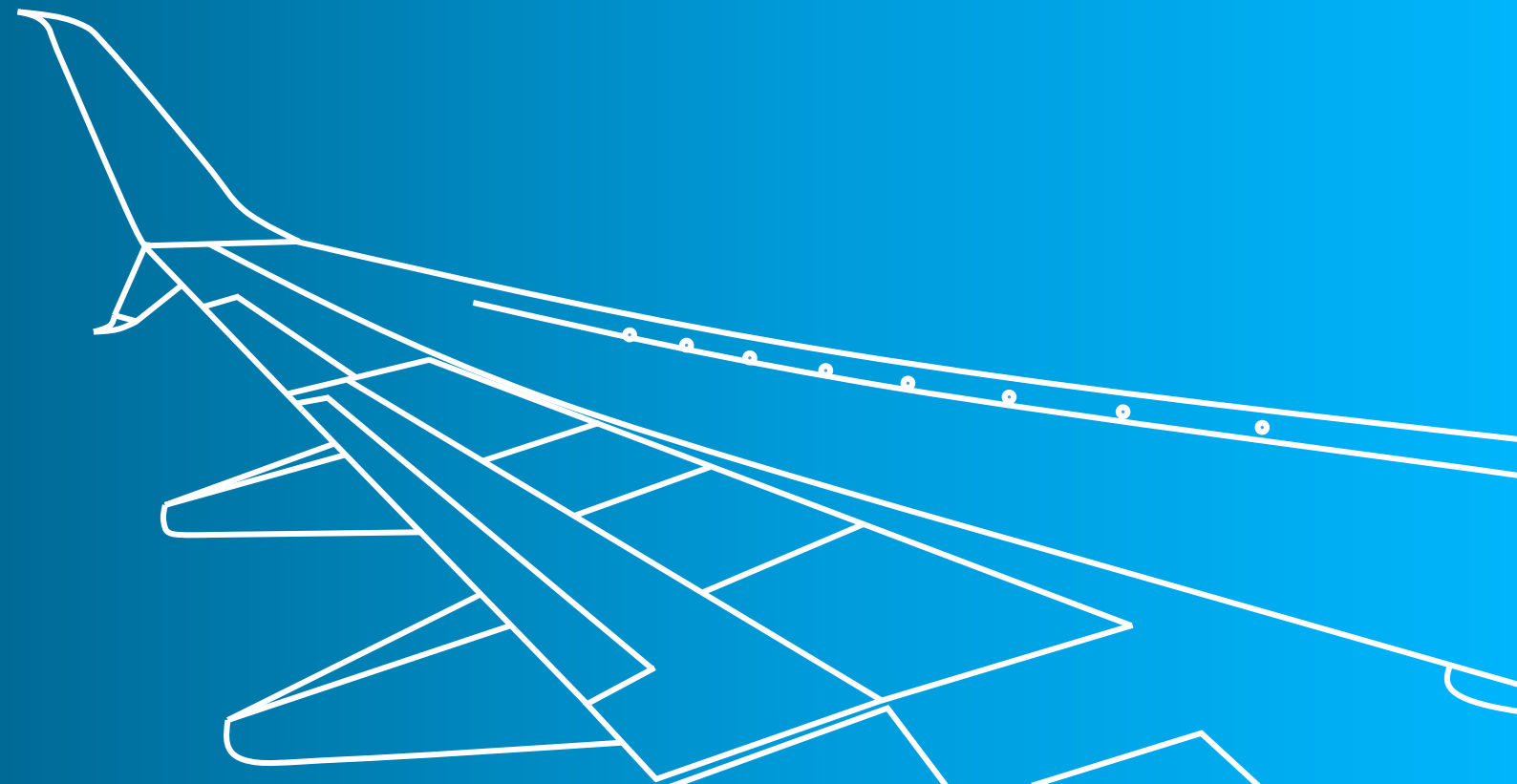




Flight Plan 2020-2025

Responsive Strategies for Safe & Sustainable Aviation



Foreword

Our island nation, more than any other country, relies on aviation to connect our people with each other and to the rest of the world. It is a key element that underpins tourism the dynamic, multi-faceted, cross sectorial commercial power hub of the current Maldivian economic landscape.

This 'Flight Plan' sets out, for the first time, the Government's and the Civil Aviation Authority's long term policies and objectives for the aviation industry – the blood line providing 'life' to the Maldivian economy across the board. This Plan maps our journey forward as we tackle the many issues that will confront the aviation industry in the coming years.

The safety and security of the flying public drives our thinking and remains the first and foremost priority. Major air accidents seriously undermine confidence in flying, and the economic impact, as we saw in the 1990s, on the industry can be devastating. Passenger safety is embedded within each policy and we will work effectively with other implementing agencies and industry to maintain our excellent safety record.

Aviation is expanding rapidly in the Maldives and across the globe. It is expected traffic in Asia Pacific will overtake the combined traffic of Europe and North America by 2035. The right aviation infrastructure together with a robust regulatory framework and liberal air transport policies are needed to sustain the ever-growing air traffic.

According to the most recent IATA the importance of air transport to the Maldives report, 58.8% of the country's GDP is supported by inputs to the air transport sector and foreign tourists arriving by air. The report also estimates a growth of 154% of air transport market in the next 20 years under the "current trends".

This Flight Plan has been developed in consultation with aviation stakeholders. Their input was key in shaping the Flight Plan to deliver on the economic and social aspirations of the Maldivian public.

Currently, the Maldivian economy is facing unprecedented challenges including aviation sector. The industry is heading towards unchartered 'skies' whilst trying to recover from the effects of a global health pandemic and prosper. It is our highest



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priority to facilitate and lay out robust plans to lead the sector on the road to glory and success. Our aim is to ensure all roads of 'the journey' leads to achieve estimated growth levels, as forecasted, and continue to be the blood line providing 'oxygen' to rest of the economic activities in our country and beyond.

The Government's aim is to give the aviation industry the certainty and incentive to plan and invest for the long term, to maintain and improve our excellent aviation safety record, and to give clear commitments to the flying public, and the communities benefiting from aviation activities.

This 'Flight Plan' provides a comprehensive and balanced framework, bringing together all aspects of aviation policy into a single, coherent and forward looking statement — a flight path to the future to continue aviation's crucial role in connecting Maldivians to each other and to the rest of the world.

Aishath Nahula
Minister

Ahmed Ali Maniku
Chairman

Hussain Jaleel
Chief Executive

Introduction

The Maldives Aviation Sector

Aviation is an industry of national strategic importance to the Maldives. The wide dispersion of the population coupled with our remote location means air transport is *the* link that connects our people with each other and the rest of the world. It is also vital to our economy with a direct contribution of approximately 10% to the GDP. One of the highest in the world.

Not only is air transport a major economic generator on its own right, but the resulting connectivity provided by this sector helps us attract tourists, facilitates trade and investment, and contributes to the growth of our economy. It is estimated the direct, indirect and induced effects of aviation accounts for 58.8% of the national GDP.

We are experiencing an unprecedented growth rate in aviation. Before the pandemic it was estimated that we will achieve 86% growth in aviation’s contribution to GDP by 2035 if capacity is unrestrained.

At a Glance¹

58.8% of GDP	Direct, Indirect and Induced contribution to the economy
5,000 jobs	Directly employed across the Maldives
4 million	Passenger movements
40 million	Tonnes of cargo

¹ IATA – The importance of air transport to the Maldives, 2019

The Civil Aviation Authority

Our Purpose

The CAA is an independent agency, established on 11 January 2012 under the Maldives Civil Aviation Authority Act (Act 2/2012) to regulate aviation in the Maldives.

Our statutory roles include sustainable development and advancement of aviation; establishment of policies and standards required to ensure aviation safety and security and to establish a fair and competitive aviation industry.

We are committed to ensure all of our decisions contribute to optimal safety outcomes, are reasonable, consistent and with undue burden on the aviation industry.

Vision

Regulatory
excellence in aviation
safety and security
through a motivated
workforce

Mission

Develop and
administer policies
and regulations to
ensure safe, secure
and orderly
economic
development of
aviation for Maldives

Strategic Priorities

Foundations

The overarching goal of aviation is to connect our people with each other and the rest of the world in a safe and economically sustainable manner that is kind on the environment.

The foundations of our 'Flight Plan' are based on five strategic priorities. Safety forms the cornerstone and it will continue to be our highest priority. Sustainable economic development of air transport with the passenger at its heart and our commitment to environmental protection will be key. We intend to support these activities as a world-class aviation regulator with a competent and motivated workforce.

Strategic Objective 1

Enhance aviation safety performance

The targeted outcomes identified to address this strategic objective are as follows:

- a. The Maldivian aviation industry will have achieved a continuous reduction of operational safety risks [GASP-G1];
- b. Safety regulation will be risk-based, proportional, transparent, consistent and targeted;
- c. Have developed an effective State Safety Programme (SSP) [GASP-G3] [SAP 4.2.4.4a];
- d. Have built a capacity, both at the CAA and industry, to support the adoption of safety management systems in the industry [SAP 4.2.4.4a];
- e. Rulemaking will take into account common and proven international standards;
- f. The CAA will contribute to the achievement of safety objectives through increased collaboration with regional aviation safety groups, ICAO and EASA [GASP-G4];
- g. Industry will have increased participation in ICAO-recognised industry assessments [GASP-G5];
- h. Have adopted technologies and current international standards to ensure tangible safety benefits as well as capacity and efficiency improvements to Maldivian airspace [GASP-G6], [SAP 4.2.4.5a];
- i. Strengthened CAA's ability to take enforcement action where there is a serious and imminent risk to public safety.

Safety forms the cornerstone of our 'Flight Plan' and it will continue to be our highest priority.

Strategic Objective 2

Improve choice and value for the aviation consumer

The targeted outcomes identified to address this strategic objective are as follows:

- a. Maintain a liberal aviation policy that benefits tourism, trade and promotes competition, allows Maldivian carriers to expand and maintain a vibrant Maldivian-based aviation industry [SAP 4.2.4.3c];
- b. Unrestricted access for dedicated cargo services/operation with seventh freedom rights [SAP 4.2.4.3c];
- c. Route allocation amongst Maldivian carriers will be based on economic assessments;
- d. The CAA will have promulgated economic regulations such that consumer and competition issues will be identified and resolved in a more structured and consistent manner [SAP 4.2.4.1c, 4.2.4.3d, 4.2.4.3e];
- e. The CAA will have worked with the relevant agencies to promulgate a passenger rights Act [SAP 4.2.4.1d];
- f. Consumers will have access to more and better relevant information about price and non-price aspects of their buying decisions;
- g. The CAA will have collected vital data and statistics in key air transport areas and achieved optimum balance of capacity utilisation;
- h. Regulated airports will have increased their focus on improving customer experience;
- i. The CAA will work with Maldives airport operators on appropriately high quality standards for assisting passengers with a disability and those with mobility restrictions, including non-visible conditions, and that they monitor and report publicly and to the CAA on their performance.

The direct, indirect and induced contribution of aviation to the economy is at 37% of the GDP and promises to maintain healthy growth.

The forecasted GDP benefits can only be achieved through an open and competitive market that contributes to the consumers' ability to make informed decisions (and protecting them where appropriate).

Strategic Objective 3

Reduce the environmental impact of aviation

The targeted outcomes identified to address this strategic objective are as follows:

- a. limit or reduce the number of people affected by significant aircraft noise;
- b. limit or reduce the impact of aviation emissions on local air quality;
- c. limit or reduce the impact of aviation greenhouse gas emissions on the global climate [SAP 4.2.4.5b];
- d. Pursue efficiency improvements in the Maldivian airspace to reduce environmental impact of aviation;
- e. Place greater emphasis on environmental factors in the selection of floating platforms and construction of aerodromes.
- f. CAA will aim to achieve a carbon-neutral growth for international flights from 2020 onwards through the implementation of the ICAO CORSIA.

The Maldivian economy runs on the natural beauty that development, climate change and other environmental problems threaten.

The Maldives will have become a championing voice on environmental issues in the aviation sector and emphasize on the environmental impact of aviation and the measures to off-set and reduce emissions in line with government policies and objectives.

It is of utmost importance that we reduce the environmental footprint of aviation.

Strategic Objective 4

Be a better and efficient Regulator

The targeted outcomes identified to address this strategic objective are as follows:

- a. The CAA will have strengthened its safety oversight capabilities [GASP-G2];
- b. The CAA will have revised the primary legislations on the safety of civil aviation [SAP 4.2.4.1a]
- c. Stakeholders will have more focused and effective input into our consultations through a better targeted and more open process;
- d. Regulatory approaches geared towards the identification of risks and the development of proportionate solutions;
- e. Enforcement policy will focus industry's attention on addressing risks to the consumer;
- f. Maintain close and constructive working relationships with the Government and other agencies;
- g. Foster strong working relationships with the international aviation community;
- h. Establish a mechanism of providing streamlined technical guidance, advise, position and opinion to government agencies on aviation and matters related to aviation;
- i. Attract and retain an adequate number of appropriately skilled staff and optimize their capability and performance;
- j. Improve financial management while delivering a quality service;
- k. Implement knowledge and information management systems that allows CAA to refine its evidence-based decision-making capability;
- l. Implement an independent internal Quality Management System within the CAA as a short-term objective and obtain ISO 9001 approval in the long term;
- m. Establish a training institution to deliver on the education, awareness and training needs of CAA and aviation industry and make the institution the technical co-operation arm of the CAA delivering on the technical co-operation needs of partners and the rest of the world as committed by the CAA;
- n. The CAA will be noticeably more transparent by providing more information, communicating, and engaging effectively with all our stake holders on decision making processes and putting in place a corporate complaints process to ensure provision of high standard of service to everyone;
- o. Become a key player in the regional programmes enabling and encouraging aviation safety promotion through strategic partnerships and remain relevant in bringing positive impact beyond the Maldives.

The CAA is the sentinel charged with safe and sustainable development of aviation in the Maldives.

Safe and sustainable aviation requires a strong Authority sensitive to the needs of the industry and the general public.

Strategic Objective 5

Enhance end-to-end passenger experience

The targeted outcomes identified to address this strategic objective are as follows:

- a. Ensure coordination between relevant ministries, agencies and industry to remove unnecessary obstacles and delays and improve efficiency and service levels of air transport services;
- b. Review and ensure conformity by all relevant agencies with the provision of ICAO Annex 9;
- c. Ensure consumers have access to quick, fair, and cost-effective complaints handling.

Passenger traffic is expected to reach 7 million passengers by 2023, creating an unprecedented need to reconcile facilitation and security procedures with passenger flow.

CAA will focus on the crucial areas of terminal capacity, border control, passenger service, cargo handling and risk assessment with the aim to provide a secure, seamless and efficient “end-to-end” passenger experience.

Challenges and Trends

Meeting the Needs of Tomorrow

Air travel supports economic growth by connecting worldwide marketplaces. It is likely that the business pressure on the aviation industry will increase in a world where global enterprise is becoming more popular. We must be ready to meet these challenges.

The 2015 Boeing Pilot and Technical Outlook forecasts that “between now and 2034, the aviation industry will need to supply more than one million new aviation personnel”

Key Challenges / Trends	CAA Response
Shortage of competent aviation professionals	<ul style="list-style-type: none"> a. Raise awareness of the impending shortages of aviation professionals b. Promote aviation amongst youth as a viable career c. Increase funding for the training of next generation aviation professionals
Major infrastructure developments at aerodromes	<ul style="list-style-type: none"> a. Provide appropriate staffing levels to undertake adequate oversight
Expansion of domestic airlines	<ul style="list-style-type: none"> a. Ensuring the maintenance of a level competitive playing field b. Ensuring passenger rights are upheld c. Maintaining high standards of safety without impeding growth
Re-introduction of helicopter operations	<ul style="list-style-type: none"> a. Conduct a thorough safety review of helicopter operations in the Maldives b. Engage specialist technical staff to enhance oversight of helicopter activities c. Sign bilateral agreements with States of Design to support oversight and investigative activities
Changes associated with the implementation of new regulations	<ul style="list-style-type: none"> a. Engaging the aviation community in the introduction of new regulations. b. Providing accessible, comprehensive and accurate guidance material. c. Delivering effective training, workshops and education tools. d. Minimising the burden of any new regulations, while maintaining appropriate safety levels.

Key Challenges / Trends	CAA Response
Technological innovation	a. Develop risk-based regulatory frameworks, to support technological innovations such as drones or UAVs.
Increased participation in sports and recreational aviation	a. Introduce risk-based regulation and continue to refine policy to effectively manage safety b. Introduce and support aviation sports associations c. Provide appropriate staffing levels to undertake adequate oversight d. Encourage amalgamation of aviation recreation and sports activities into other economic activities in the country