It was in recognition of aviation’s key economic role in Ireland, and a need to take stock of the many significant developments in global aviation across two decades, which underpinned the drive towards a new Government policy for Irish aviation. Since its launch in 2015, the National Aviation Policy is proving itself a robust framework supporting the continued growth of Irish aviation, in helping to build on its reputation in global aviation and providing the environment for aviation to maximise its contribution to wider economic recovery.

The signs of the strength and continued growth of Irish aviation are clearly evident. The ongoing development of new and expanded route options to existing and new marketplaces is just one measure. The growth in passenger numbers handled through our airports is also a clear signal which of course brings its own challenges and opportunities for the future. The NAP is forward thinking beyond a narrow timeframe, for example, in setting out a set of actions to ensure that growing capacity needs are assessed and met through combined Government action and of aviation stakeholders. This 2nd NAP progress report, details progress across all of the aspects of the policy with the majority of actions now substantively underway and indeed, many completed with some giving rise to ongoing activities in support of the goals of the policy.
The NAP is not only a statement of policy objectives; it also represents a collaborative approach to furthering Irish aviation shaped by its industry insights. The collaborative approach continues successfully, not least through the ongoing structures of the National Civil Aviation Development Forum.

Building on the progress achieved, as outlined in the 1st progress report of 2016, DTTAS presents the following status update on the 73 point action plan spanning nine policy areas. Looking back over the past three and a half years the detailed sections provide further insight into key activities which have driven forward significant progress in growing the aviation industry in Ireland.
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The principal goals of the National Aviation Policy are:

To foster the growth of aviation enterprise in Ireland to support job creation and position Ireland as a recognised global leader in aviation; and

To enhance Ireland’s connectivity by ensuring safe, secure and competitive access responsive to the needs of business, tourism and consumers;

To maximise the contribution of the aviation sector to Ireland’s economic growth and development.
Background to the National Aviation Policy

The Department of Transport, Tourism and Sport, launched the National Aviation Policy (NAP) for Ireland, in August 2015. The primary objective of the National Aviation Policy is to facilitate and enhance Ireland’s air connectivity in a safe, competitive, cost-effective and sustainable manner, in the wider context of supporting Ireland’s economic and social goals. In order to achieve this objective, the NAP clearly outlines specific policy positions and actions in relation to nine different aspects of aviation, namely:

- The International Context
- Safety, Security and Sustainability
- Connectivity and Aviation Services
- Airports
- Regulation and Governance
- Aircraft Leasing, Financing and MRO
- General Aviation, Education and Training
- Statistics
- Consultation

At the launch of the new policy for the Irish aviation sector, the Minister for Transport, Tourism and Sport noted that “Aviation matters. It matters to the Irish economy, it matters to consumers, and it matters to this Government” and pledged that the implementation of the NAP was a key priority for this Department.
Despite the ever changing market conditions and in particular the challenge now posed by Brexit, over the past three years, significant progress has been made on the actions outlined across each of the nine policy areas. This is reflected in the first Report on progress of the National Aviation Policy which was published in October 2016. Since then, the Department, in close collaboration with other relevant state entities and the aviation industry itself, has continued to make significant progress across a number of actions proposed, such as:

- In 2016 Ireland was elected to the 36 member ICAO Council at the 39th ICAO Assembly. Ireland will continue in this role until 2019.
- In May 2017, the insolvency provisions specific to the Cape Town Conventions and its associated Aircraft Protocol (known as “Alternative A”) was signed into Irish law.
- The biannual meetings of the National Facilitation (FAL) Committee on aviation continue with inputs from all relevant Government Departments and Agencies.
- The National Civil Aviation Development Forum (NCADF), consisting of over sixty senior aviation stakeholders, was established in order to facilitate closer collaborative links with industry.
- In line with the aim to enhance Ireland’s connectivity, and take strategic steps to ensure sufficient capacity for the increasing air traffic demand, the second parallel runway project at Dublin Airport is now underway.
- Significant progress made on bringing forward two pieces of legislation of strategic importance to the further development of Dublin Airport:
  - The Aircraft Noise (Dublin Airport) Regulation Bill designating Fingal County Council as the competent authority for the implementation of the Noise Regulation is before the Oireachtas;
  - A revised Government policy statement on airport charges was published in 2017. DTTAS had consulted widely prior to the development of the policy statement and subsequently with NCADF membership to help refine policy options. Work is underway to revise the Aviation Regulation Act, 2001 to give effect to these provisions.
- To ensure the long-term development of State Airports, the Department commissioned a review of the future capacity needs at Ireland’s State Airports. Following the report’s publication on 26 October 2018, stakeholders were invited through a public consultation process to submit views. It is anticipated, following the consultation process, that a policy statement on airport development will be decided by Government in early 2019.
- In line with commitments outlined in the NAP, the Department published quarterly aviation statistical information on its website throughout 2017 and 2018 in relation to State and Regional Airports, including passenger numbers, cargo carried and airport commercial movements.
- The number of passengers handled by the main Irish airports continues to increase. For example, in the first quarter of 2018, just over 6.9 million passengers passed through the five main airports, an increase of 3.9% over the same period in 2017.
- Ireland made a further commitment to reduce the environmental impact of aviation by confirming its participation in the ICAO Carbon Offsetting and Reduction Scheme for International Aviation (CORSIA) from its pilot phase in 2021.

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2 The First Progress Report on the National Aviation Policy Action Plan is available on the Department of Transport, Tourism and Sport website.
Ireland has increased its connectivity through a number of air transport agreements that have been negotiated via the EU. In addition to EU Agreements, we continue to pursue measures to enhance Ireland’s bilateral aviation relations with emerging markets.

**Purpose of this Report**

Aviation, as a global industry, is particularly susceptible to external shocks. The NAP was published in advance of the decision by the UK to withdraw from the European Union (Brexit), a decision that has the potential to have significant consequences for the Irish aviation industry. In addition, the International Air Transport Association (IATA) expects 7.8 billion passengers to travel in 2036, a near doubling of the 4 billion air travellers in 2017. The growing demand for commercial aviation provides an unprecedented opportunity for the aviation sector.

Despite these changing circumstances, the specific policy positions and actions outlined in the NAP continue to inform the work of the Department. The market conditions the NAP aims to create should ensure that the Irish aviation industry is capable of adapting to meet the challenges and opportunities created by the ever evolving global aviation environment. Therefore, it is considered timely to review the Department’s progress towards achieving the principal goals and objectives as outlined in the NAP.

The Second Progress Report focuses on the high-level objectives contained within the NAP and the action taken by the Department in tandem with other government, agency and aviation stakeholders to ensure these objectives are realised and Ireland’s position as a leader in global aviation is maintained.

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4 The Department of Transport, Tourism and Sport is actively engaging on key issues such as the implications of Brexit on air traffic rights, impacts on effective coordination of aviation safety, security and air traffic management. The Department is preparing for all Brexit scenarios.
Ireland contributes on a wide international stage on all civil aviation issues including safety, security, environmental, and economic to name a few. Ireland is seen as a global leader for the aircraft leasing industry and is one of the largest international hubs for aircraft leasing and aircraft management activities. At the 39th ICAO Assembly, Ireland was elected for the period 2016-2019 to the ICAO Council tasked with adopting international Standards and Recommended Practices (SARPS) for Civil Aviation. On a European level, Ireland is an active member of the European Civil Aviation Conference (ECAC) and currently represents the ABIS Rotation Group consisting of 7 other ECAC Member States (Austria, Ireland, Belgium, Switzerland, The Netherlands, Portugal, Luxembourg and Croatia) at the ICAO Council.

Progress on the main National Aviation Policy Positions

Policy Area One: International Context

**Policy Position:**
Ireland will participate actively in international fora to influence developments in the aviation sector.
Aviation is a global industry and as a result it is necessary to actively participate in international fora to influence developments and enable the Irish aviation industry to compete effectively in the continuously evolving global market.

- Fintan Towe is the Director General of Civil Aviation (DGCA) in Ireland. The DGCA participates in a number of EU and International Committees and represents Ireland at meetings of ECAC and ABIS. The DGCA works to promote and defend the interests of the Irish aviation sector, at international fora.

Director General for Civil Aviation, Fintan Towe, on international relations

“Civil aviation is truly an international endeavour which has its global legal basis established by ICAO. ICAO’s work through its various structures brings together aviation experts from across the globe to ensure the world-wide rule book for international aviation is fit-for-purpose. Further at a European level there are opportunities for collaboration and exchange of best practice among the 44 ECAC members to safeguard a safe and efficient aviation sector for all. The EU legislative framework is the mechanism through which a wide range of regulatory matters in air transport are given effect in practice. My role includes the effective representation of Ireland’s interests at various fora at the highest level of decision making. It is critical that Ireland as a significant international aviation nation has a voice in decisions that would impact policy and regulation of air transport internationally. As DGCA for Ireland I am offered that opportunity through formal channels and also through informal contact with my counterparts throughout Europe and beyond.”

- Ireland, as part of the ABIS Group, has been elected to the 36 member ICAO Council for the period 2016-2019. The election took place at the 39th ICAO Assembly held from 27 September to 7 October 2016 at ICAO’s headquarters in Montreal, Canada. Since being elected to the ICAO Council in October 2016, Ireland has participated in 7 Council Sessions and has made important contributions to discussions on aviation safety and air navigation, aviation security and facilitation, air transport development and environmental protection. Annemarie Smith Floch is currently serving as Ireland’s representative on the ICAO Council.

Ireland’s ICAO Council Representative, Annemarie Smith Floch on her role says...

“As a member of the ICAO Council, Ireland is contributing to the development of aviation standards that improve the safety, security and environmental performance of the global aviation network. It is a unique opportunity for Ireland to share its particular experience in aviation at the very highest level and to ensure that the sector’s continued growth is supported by a robust and efficient regulatory framework.”
In addition, through the NCADF, the Department has consulted with the industry on a number of significant international legislative issues. Two such examples are the CORSIA package and the revision of the EASA Basic Regulation at EU level. In 2018 the Department facilitated opportunities for the NCADF membership to meet Government Ministers and a delegation of the European Parliament’s TRAN Committee on Brexit matters.

The Department, together with its colleagues in the Permanent Representative at the EU, provided input into the development of a number of measures at European level. Ireland engages with the European Commission, the European Parliament and with other EU member States, on a wide range of measures relating to aviation. The Department’s Permanent Representative has identified the following areas as being of particular importance; the revision to Regulation 868 (safeguarding competition in European aviation); third country agreements; and of course Brexit. Department officials in the Irish Permanent Representation to the EU represent Irish interests in legislative proposals and act as a vehicle to lobby the main EU stakeholders such as other Member States, Council Presidency, the Parliament and the Commission in the pursuit of key Irish issues.
Ireland has an excellent aviation safety record and maintaining the highest standards of safety continues to be the primary objective of Irish aviation policy. While the primary responsibility for aviation safety rests with the operator, officials in the Department together with the Air Accident Investigation Unit (AAIU) and the Irish Aviation Authority (IAA) have taken a number of important steps to ensure the safety of air travel.

- The AAIU continues to act as the independent safety authority responsible for the independent investigation of aircraft accidents, serious incidents, and incidents (Occurrences) that occur within Ireland. Ireland, through the IAA facilitates and promotes the mandatory occurrence reporting in accordance with EU regulation and ICAO requirements. In addition, the Department is currently transposing the revised EU Regulations on Occurrence Reporting, in consultation with the relevant stakeholders.

- The IAA and the AAIU continue to work closely together to monitor safety trends through sharing de-identified ECCAIRS data on accidents and serious incidents.

**Policy Area Two: Safety, Security and Sustainability**

**Policy Position: Safety**

Safety will remain the first priority objective of Irish aviation policy.
The Department and the IAA have established a system of co-ordination meetings as required under the State Safety Programme. Since 2016 there have been 6 State Safety Programme co-ordination meetings, between the IAA and the Department. A range of issues relating to aviation safety were discussed, such as:

- State Safety Plan
- New EASA Basic Regulation
- EU Regulation on Occurrence Reporting
- Alcohol Testing in RAMP inspections
- Brexit
- Drones
- ICAO Universal Safety Oversight Audit Programme (USOAP)
- EASA standardisation inspections and alignment with ICAO Continuous Monitoring Approach (CMA)

Ireland participated in the EU Council Working Party (AWP) in the detailed examination of the revision of the aviation safety and EASA basic regulation 216/2008 and related matters. Regulation EU 2018/1139 was adopted on 4th July 2018 and entered into force on 11th September 2018. The Regulation included provisions related to the regulation of unmanned aircraft, safety aspects of security e.g. cyber security and strengthened proposals to provide for greater sharing of technical resources among competent authorities.

Overview of the work of the AAIU

The AAIU is part of the Department, and is responsible for the independent investigation of aircraft accidents, serious incidents, and incidents (Occurrences) that occur within Ireland. In addition the AAIU provides assistance to foreign safety investigation authorities who conduct investigations into occurrences involving Irish registered and/or operated aircraft abroad. Furthermore, in some cases Foreign States may delegate Investigations back to the AAIU.

The Chief Inspector of Air Accidents reports directly to the Minister for Transport, Tourism & Sport.

The AAIU conducts its investigations of aviation occurrences in accordance with Annex 13 (11th Edition) to the International Civil Aviation Organisation Convention, REGULATION (EU) No 996/2010 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL, and Statutory Instrument No. 460 of 2009. The fundamental purpose of such investigation is to determine the circumstances and causes of these events, with a view to the preservation of life and the avoidance of similar occurrences in the future. It is not the purpose of such investigations to apportion blame or liability.

In a review of the results of 56 states, under the ICAO Universal Safety Oversight Audit Programme Continuous Monitoring Approach (USOAP CMA), the AAIU achieved the highest score of 100% for effective implementation specific to accident and incident investigation.
The role of the State in aviation security is to ensure that all key players in the sector including airports, airlines and other regulated entities in the supply chain are adhering to internationally recognised rules and regulations. As such, all the key players in the aviation sector must work together to ensure a high quality national aviation security system.

The National Civil Aviation Security Committee (NCASC), consisting of Government Departments, state agencies and industry, meets on a biannual basis to advise the Government on all aviation security policy matters. This is done by the formation of working groups consisting of Government and industry experts who are mandated to work on various aviation security policy streams. Policy recommendations are subsequently incorporated into the National Civil Aviation Security Plan (NCASP) by way of the annual review. The NCASP, as a living document, is reviewed annually by State and industry stakeholders.

This approach best balances the needs of industry with the requirements of aviation security. The current review is focused on incorporating more regulated entities and agents than
before while further expanding the risk-basis outcome-focused approach to more members of industry than before. The risk-based outcome-focused approach facilitates greater flexibility as it does not prescribe directly how entities must implement security controls but rather provides them with a toolbox which allows them to assess how best to implement security controls.

**Director General of the NCASC (Fintan Towey)**

“The work of the NCASC has been instrumental in ensuring that Ireland continues to implement all necessary aviation security measures, taking account of international rules and norms and national threat and risk assessments. This collaboration between State and industry is integral to the continued development of effective aviation security policy.”

**Policy Position: Sustainability**

**Climate Change and the Environment:** Ireland is committed to working with its EU and international partners to mitigate the impacts of aviation on the environment and facilitate the sustainable growth of the sector.

Although aviation represents only 2% of global CO$_2$ emissions, the IAA notes that “tackling the environmental issues is the latest major challenge facing global aviation”. As such, the Department engaged in ongoing efforts with relevant partners at both national and international level to address the environmental impact of aviation.

- Irish registered aircraft operators have participated in the EU Emissions Trading System (EU-ETS) Aviation since its inception. Since January 2012, emissions from all flights from, to and within the European Economic Area (EEA) are included in the EU-ETS. The system has so far contributed to reducing the carbon footprint of the aviation sector by more than 17 million tonnes per year, with compliance covering over 99.5% of emissions. The Department worked in close collaboration with colleagues in the Department of Communications, Climate Action and the Environment (DCCAE) on the most recent revision to the EU-ETS Directive (Regulation 2017/2392) which sets a pathway for the implementation of CORSIA (Carbon Offsetting and Reduction Scheme for International Aviation) at European level via EU-ETS structures.

- Ireland’s ICAO Council member and the Department played an active and constructive role in the development of the ICAO global MBM scheme, commonly referred to as CORSIA. The scheme aims to address any annual increase in total CO$_2$ emissions from international civil aviation above 2020 levels.

- The revision of Ireland’s Action Plan for Aviation Emissions Reduction 2015-2019, which outlines the key mitigation measures adopted at both supra-national and national level to reduce aviation emissions is underway with relevant aviation and environment stakeholders.
Collaboration of Department of Communications, Climate Action and Environment (DCCAE) and DTTAS on sustainable aviation

DCCAE is the lead Department on climate change matters. However, since aviation was brought under the scope of the EU-ETS in 2008, the Department of Communications, Climate Action and Environment and the Department of Transport, Tourism and Sport are working collaboratively to address the environmental impact of aviation. Both Departments are fully committed to pursuing an agenda in favour of reducing emissions and have worked collaboratively to ensure that Ireland makes an informed contribution to discussions relating to EU-ETS Aviation and also the ongoing development of the ICAO’s GMBM scheme, CORSIA. The NAP reinforces Ireland’s commitment to the development of a sustainable, resource-efficient aviation sector.

EU Regulation (EC) No. 598 of 2014 requires Ireland to implement a “Balanced Approach” to aviation noise management at Irish airports.

- A Government Decision was taken in January 2018 to designate Fingal County Council as the Competent Authority with An Bord Pleanála as the independent Appeals Body. A decision was also taken to implement the requirements of EU Regulation 598/2014 by way of Primary Legislation. Outline Heads of Bill were approved by Cabinet in July 2018. The DTTAS along with the Department of Housing, Planning and Local Government progressed draft Heads of a Bill over the summer months with formal drafting of the Bill commenced in September 2018. The legislation is currently before the Oireachtas.
The creation of the EU single market for aviation in the 1990s removed all commercial restrictions on airlines flying within the EU. Under the single market, all EU carriers can operate services on any intra-EU route. The single market has transformed air travel in Europe reducing prices while increasing consumer choice and connectivity. For countries with which Ireland continues to negotiate on a bilateral basis, the general policy will be guided by free market principles. Ireland traditionally has a liberal aviation policy, and it remains positively disposed towards the approval of fifth freedom rights in bilateral agreements.

Since the publication of the NAP, the Department has worked to increase and extend Ireland’s bilateral agreements with other states. This included revising and modernising Ireland’s “Model Air Service Agreement” and also attending the ICAO Air Services Negotiation Event (ICAN 2015) for the first time in October 2015. In addition, two

Policy Area Three: Connectivity and Aviation Services

Policy Position
Ireland’s ultimate objective in bilateral negotiations will be to reach agreement on the basis of fifth freedom rights on a reciprocal basis. In doing so, account will be taken of objective criteria, particularly any developed by the EU on fair competition. Initially such freedoms will be for routes where identified services are to be provided and will be subject to specific approval by both States.
new bilateral air service agreements were initialled with Oman and Saudi Arabia. A Memorandum of Understanding (MoU) with China was signed on 26 September 2016 with a view to putting into operation aspects of the China-Ireland Air Services Agreement and the potential for direct air services, as well as expanding the agreement in relation to the designation of airports, airlines and code-sharing rights. A new Bilateral Air Services Agreement was initialled, and a new MoU was signed between Ireland and Hong-Kong on the 6 June 2018 in Dublin. The Ireland-UAE agreement was signed and formally entered into force in September 2018 while further progress was made on the ASA with Egypt which is awaiting formal signature early in 2019. The Department has also continued to actively support EU efforts to negotiate full Open Skies agreements with third countries as part of the EU Aviation Strategy.

**Negotiation and agreement of two bilateral aviation agreements: An Overview**

Before a bilateral Air Service Agreement (ASA) can be signed and ratified Ireland’s internal domestic procedures have to be satisfactorily concluded as follows:

- Advice from the Attorney General’s Office (AGO) confirming the ASA is an international agreement in accordance with Article 29 of the Constitution;
- Advice from AGO that Dáil approval in accordance with Article 29.5 of the Constitution on the basis the ASA could give rise to a charge on public funds;
- Government Approval (Both Memoranda are brought to Government by the Minister for Foreign Affairs and Trade on behalf of the Minister for Transport, Tourism and Sport on the basis that ASAs are deemed international agreements); and
- Dáil Approval.

In June 2018, the Government approved the moving of a Dáil Motion approving the terms of ASAs between Ireland and the Arab Republic of Egypt and an Air Services Agreement between Ireland the United Arab Emirates (UAE) between and beyond their respective territories. The UAE ASA was initialled on 8 December 2011 and provisionally applied from that date.

The Dáil approved the motion moving both ASAs on 12 July 2018 thereby completing Ireland’s internal domestic procedures. No new legislation is required to give effect to the Agreements.

In accordance with both ASAs they shall enter into force on the day the last written notification is received by diplomatic note confirming that the Contracting Parties have fulfilled all respective internal procedures required for the entry into force of the Agreement. Diplomatic notes have been exchanged with both the UAE and Egypt confirming Ireland’s internal procedures have been completed.

Formal signature by the Tánaiste of the IRL-UAE agreement took place during the 73rd Session of the UN General Assembly in New York in September 2018. The IRL-UAE ASA has now formally entered into force. It is anticipated the Egyptian authorities are likely be in a position to formally sign the ASA between Ireland and Egypt early 2019.
Irish Airlines

**Policy Position:**
Ireland will continue to pursue an airline policy based on competition between at least two airlines with significant home bases in the Irish market and facilitate a market which is open to new entrants in order to maximise connectivity and competition.

While no specific action is assigned to this policy position Ireland continues to ensure that the conditions exist for effective competition and maximum connectivity which is evidenced by the ever increasing choice of airlines and route options for the benefit of all air travel consumers.

**Policy Position: Air Cargo Services**
Ireland’s export competitiveness should be enhanced through improved air-cargo provision to existing and emerging markets.

While Ireland is generally well serviced for air-cargo connectivity, the NAP acknowledged that considerable scope exists to enhance Ireland’s export competitiveness through better air-cargo provisions.

- Progress has been made on advancing and developing air-cargo particularly in relation to the removal of limits on cargo capacity in Ireland’s bilateral air transport agreements. Fifth freedom traffic rights are not automatically granted to airlines. Such rights are only granted on a case by case basis subject to the approval of the Aeronautical Authorities of both of the Contracting Parties. A number of applications for fifth freedom cargo services have been approved, in particular on routes to the USA.

- In general terms where the Department is seeking to negotiate new agreements or amend existing ones the policy will be that such agreements should not have capacity restrictions for either passengers or cargo. Ireland’s revised “Model Air Services Agreement” has no such restrictions.

**Policy Position: US Preclearance Service**
US preclearance is an asset that has further potential to contribute to the development of Dublin and Shannon Airports. The Department’s objective is that all US bound flights from Dublin and Shannon wishing to do so can be pre-cleared.

Ireland has an aviation preclearance agreement with the US since November 2008. US Preclearance provides a means for passengers of US bound flights from Dublin and Shannon Airports to fully clear United States immigration, customs, agriculture and security controls.
Air Traffic Management (ATM) is a key component underpinning the global air transport market. In Ireland, the IAA has statutory responsibility to provide certain ATM services in relation to civil aviation. The provision of high-quality air navigation services and maintenance of a modern aviation infrastructure on a sustainable ongoing basis is a major challenge for Ireland and other EU Member States under the provisions of the Single European Skies.

- In order to encourage investment in modern, technologically advanced, cost-efficient aviation infrastructure, the Department over the past three years has facilitated and endorsed applications for funding by the IAA and others from the Irish aviation sector under the EU SESAR 2020 research and development programme. Successful projects will require ongoing monitoring, arrangements are currently being developed.
Policy Area Four: Airports

Policy Position: The Irish Airport Network
The Department will encourage airports to attract new business, to achieve excellence in the delivery of service and value for passengers and airlines, and to make a sustainable contribution to their respective local economies.

- DTTAS maintains oversight on an on-going basis of the three state airports. Oxford Economics and Cambridge Economic Policy Associates (CEPA) undertook a Review of the Capacity Needs of Ireland’s State Airports. The review considered the long-term development of the three State airports to 2050, with the identification and prioritisation of new infrastructure development including modification, if any, to the existing airport infrastructure to meet forecasted passenger throughput to 2050. The review also examined the key elements of airport and airside capacity, namely terminal capacity, apron stands and the runway and taxiway system as well as landside capacity, particularly the impacts of capacity needs on the wider transport network.
In the case of Dublin Airport, the study assessed the timeframe for the development of new terminal capacity – Terminal 3 – and its appropriate design and optimum location. The review also assessed the relative advantages and disadvantages of the funding and operation of Terminal 3 by the existing airport operator in comparison to being operated on an independent basis. A period of public consultation followed the publication of the report on 26 October 2018. The Minister has stated his intention to bring policy options for capacity enhancement at Dublin Airport to Government early 2019.

Policy Position: Regional Airports
Ireland recognises the important role that regional airports play in their areas and in regional development.

Regional airports in Ireland were developed in the 1980s to provide improved connectivity both nationally and internationally and significant social and economic benefits to the regions that they served, particularly at a time when rail and road connection were poor.

- At present, there are a number of supports available for regional airports. For example, Ireland continues to implement the EU approved Framework (Regional Airports Programme 2015-2019) of supports for regional airports. Airports seeking support under the Programme are required to submit clear business plans to demonstrate progress towards commercial viability. Regional airports received €15.6m of Exchequer support from 2015 to 2017 under the various schemes. Business plans have been received from each of the airports under the Programme and are updated each year to demonstrate progress towards commercial viability.

- Support for operational expenditure is monitored annually to demonstrate progress towards commercial viability. Payments under OPEX have been steadily reducing and no OPEX was paid in 2017. Operational aid for non-economic, non-state aid was provided under the PPR-O scheme totalling €7.5m from 2015 to 2017.

- Exchequer support for capital expenditure is limited to safety and security related issues. €6.8m of Capital funding has been spent on essential safety and security projects in the period 2015 to 2017. €4.85m was allocated in 2018.

- In addition, in order to support the economic development of Donegal and Kerry, the Government has established Public Service Obligation (PSO) air services between Dublin and the regional airports in Kerry and Donegal. The contract in place from 2015 was reviewed as per action and extended by 1 year. Subsequently, a new contract for the period 2018-2022 is now in place and will end on 31 January 2022. Total cost to Exchequer of this PSO air service contract is approximately €7.25m per year.
In order to support this goal, the Department in conjunction with the daa has worked to promote Dublin as a secondary hub airport. As a result, Dublin is now the fifth best-served airport in Europe for direct North American route connections. United States border preclearance services are available at the airport for US-bound passengers (Shannon Airport is the only other airport in Europe to offer this facility). In June 2018, Cathay Pacific launched Dublin Airport’s first ever direct route to the Asia-Pacific region with year-round services to Hong Kong and Hainan Airlines, China’s largest independent airline, commenced a new year-round service from Dublin to Beijing.

Aer Lingus continues to grow its US-EU transit operations at Dublin Airport. This summer, Aer Lingus have added three new US routes at Dublin, bringing to thirteen the number of US destinations now linked with its extensive European network.

The project to develop the second parallel runway at Dublin Airport is a key factor in providing the long term capacity requirements to facilitate its further development as a secondary hub. daa is progressing its plans for North Runway; construction began in December 2016 with the runway scheduled to be delivered by 2021. daa anticipate that the project will support up to 1,200 jobs during the development phase as well as generating significant employment opportunities in the local supply chain for construction materials. The additional capacity which will be delivered by the North will support connectivity for tourism, trade and foreign direct investment and will enable airlines to expand existing services, add new routes and grow connections to Ireland’s global markets in Asia, Africa and the Americas. In addition, the three State airports are considered key tourism and business gateways for their regions. To this end, the current Tourism Action Plan includes a commitment to extend the Regional Co-operative Market Access Scheme to promote air (and sea) access to the regions outside of Dublin. To date the scheme has been a success.

The runway will be capable of delivering a 31% gain in connectivity by 2034, underpinning Dublin’s position as a leading European Airport.

daas has undertaken a range of measures over the last number of years to communicate with all stakeholders including information campaigns, and meetings with community groups and individuals.
Ownership and Operation of State Airports
The three State airports will remain in public ownership.

- It is planned that the Department will review the ownership and operational structure of the State airports starting in 2019 and subsequently at 5-year intervals. The initial review will incorporate a fresh consideration regarding the feasibility of establishing Cork as an independent airport.
To ensure that Dublin Airport has the infrastructure necessary to maintain the airport’s position as a secondary hub and operate to global markets without weight restrictions, the process to develop a second runway at Dublin Airport has commenced. Phase 1 construction of the Runway Project (including preparation of the site, realignment and building of new roads, fencing and landscaping) is complete. Following a competitive tender process a contract for the main construction works was awarded in October 2018 to a joint venture compromising Irish firm Roadbridge and Spanish infrastructure company FCC Construcción (FCC). Work on site is now underway and the runway is expected to be operational in 2021.

In addition to the ongoing consideration of long term development of the State Airports capacity by DTTAS the Project Ireland 2040 National Planning Framework (NPF) commits to the enhancement of land-side access to airports, particularly in public transport terms, such as through the Metro Link project in Dublin.

The NPF identified key enablers for the growth of Ireland’s cities, including in respect of Dublin, improving access to Dublin Airport, involving improved public transport access, connections from the road network from the west and north and in the longer term, consideration of heavy rail access to facilitate direct services from the national rail network in the context of potential future electrification. Provision of a City-wide public transport network, with enhanced accessibility from the City Centre to the National Technological Park, UL and Shannon Airport are identified as key enablers in the growth of Limerick City.

Facilitation refers to the efficient management of the flow of passengers, baggage, cargo and mail through airports while ensuring that services are delivered in a healthy, safe and secure environment while meeting and exceeding when possible, the needs and expectations of customers.

The Department continues to chair bi-annual meetings of the National FAL Committee. In October 2018, the Department successfully hosted two Facilitation events at Dublin Castle; ECAC Workshop on Health Matters in Civil Aviation and a meeting of the ECAC Facilitation Working Group.
- The ECAC Workshop on Health Matters in Civil Aviation comprises representatives of national authorities responsible for developing policy or implementing provisions related to health issues in civil aviation as well as experts/managers from airlines, airport operators and other appropriate stakeholders.

- ECAC hold bi-annual meetings of the Working Group on Facilitation of which Ireland is a member since 2011. The Working Group provides a very useful forum for Member States to discuss and share ideas and experiences and to keep each State’s stakeholders on the national FAL Committee up to date on best practice and any new requirements coming down the line.

- In addition, a new FAL Programme covering the period 2018-2021 is currently being prepared in collaboration with the FAL Committee.

**Policy Position: Visas**

The Department recognises the valuable contribution that the visa system can make in promoting growth in tourism and business travel to Ireland and as a means of supporting passenger facilitation.

Matters relating to visas and passenger facilitation will remain under review as required within the scope of the National FAL Committee.
Policy Area Five: Regulation and Governance

Policy Position: Economic Regulation
The system of airport charging for Ireland should be fit-for-purpose and appropriate to the Irish aviation market and allow that market to develop in line with the objectives of this Policy while also taking into account the Government’s statement of general principles for sectoral economic regulation and requirements of the EU Airport Charges Directive.

- A revised Policy Statement on Airport Charges Regulation was published in 2017. This statement draws on an independent expert assessment by Indecon International Economic Consultants, as part of a public consultation process with inputs by the NCADF. The Policy Statement sets out the overriding strategic objective of the economic regulation of airport charges in Ireland, which is to ensure airport customers, are presented with choice, value and quality services that also meet the highest international safety and security standards. The Minister for Transport, Tourism and Sport is planning amendments to the Aviation Regulation Act, 2001 to give effect to these policy provisions, and the required work on this is now underway.

- In terms of economic regulation of Dublin Airport, the Department’s role is to ensure that a robust legal framework is in place which is sufficiently flexible to ensure that the Airport
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is able to grow its business, whilst also allowing CAR to undertake its functions to regulate the level of revenues that the airport authority may collect in conjunction with its role as the independent supervisory authority under the EU Airport Charges Directive. The Department has consulted with all interested parties in relation to the current regime and held a workshop specifically to allow stakeholders to explore the options to allow Dublin Airport and its airline customers to reach price agreements amongst themselves, subject to regulatory oversight. The results of these consultations will feed into the amendments to the Aviation Regulation Act, 2001.

Policy Position: Aviation Regulatory Bodies
The Department will ensure that the organisational arrangements and structures for economic and safety regulation of the Irish aviation sector are effective and appropriate.

- Following its consideration of the Review of Airport Charges Regulation, the Government Decision of 1 September 2017 (S180/20/10/2003) expressly approved:
  a) A merger of the Safety Regulatory Division’s (SRD) functions of the IAA with the existing functions of CAR; Preparation of a General Scheme of a Bill to give effect to the necessary legislative changes to the Aviation Regulation Act 2001 and the Irish Aviation Act, 1993 to facilitate this structural reform.
  b) In collaboration with the IAA and CAR, the Department has begun work on the implementation of the Government Decision.

- The Department has put project governance structures in place including a Departmental led high level steering group and working groups comprising personnel from DTTAS and each of the three entities affected by this transformation project – the Safety Regulation Division and ANSP Divisions of the IAA and the CAR. The groups are addressing the broad spectrum of issues involved in a project of this nature.

- Progress has been made on a number of fronts including the organisational, corporate governance and the name of the new regulator, with the General Scheme of a Bill anticipated by year-end and enactment of the necessary legislation to give effect to the merger by Q4 2019.

Policy Position: Corporate Governance
The State’s shareholdings in commercial aviation companies will continue to be actively managed with a view to maximising financial and other returns, improving services and supporting economic development. The Department will ensure that the commercial State-owned aviation companies follow best practice corporate governance standards, including the Code of Practice for the Governance of State Bodies.

- The role of the Department is to promote best practice and provide advice and support to the State-owned aviation companies, both commercial and non-commercial, under the aegis of the Department. The Department commenced work in late 2017 on a new internal Framework for the Oversight of our State Bodies. The new Framework is designed
Ireland supports the work of the Commission on the development of a social dimension within the EU internal aviation market, with a view to protecting labour rights, while also giving due regard to the inherent need for flexibility within the sector and the need to protect the competitiveness of EU and Irish aviation.

The Department participates in DG MOVE’s work under the social dimension of the internal aviation market as required. In relation to the aviation safety and new business models, EASA has examined this issue in detail and in 2017 published a useful Practice Guide titled ‘Management of hazards related to new business models of commercial air transport operators’. The NCADF Regulatory Framework Working Group has developed a position that Ireland in its engagement at the EU will seek to ensure that the social dimension in the internal aviation market is empirically based and emphasis is given to the need for enhanced competitiveness and the contribution of innovation to job growth and consumer benefit.
Policy Area Six: Aircraft Leasing, Financing and MRO

Policy Position
Ireland recognises the valuable contribution that the aircraft leasing, finance and MRO industries make in their own right and in supporting other activities in the wider aviation sector. We are committed to maintaining and building Ireland’s attractiveness as a base for these activities and particularly to creating the condition to grow employment in these industries.

The State has taken a number of steps in recent years to bolster Ireland’s preeminent position in aircraft leasing. The NAP for example, commits to maintain and build Ireland’s attractiveness as a base for these activities and particularly to create conditions to facilitate growth and employment in aircraft leasing, financing and also in ancillary services such as aircraft Maintenance, Repair and Overhaul (MRO).

- Ireland was one of the first countries to sign and ratify the Cape Town Convention (CTC), and its associated Aircraft Protocol, which came into force on 1 March 2006. The CTC is the international legal framework for the formation, registration through an online International Registry (IR), protection and enforcement of certain international interests in airframes, aircraft engines and helicopters. Ireland, through Aviareto, has operated and run the International Registry since its inception in 2006.
The IR reached 1 million registrations in January 2019, representing half a trillion dollars of aircraft assets.

In 2017, Statutory Instrument No 187 of 2017 gave effect to the Cape Town Convention insolvency arrangements known as “Alternative A” into Irish Law giving legal certainty to Irish-based aviation finance and aircraft leasing companies in relation to the repossession of their assets. The implementation of “Alternative A” is recognised as a significant addition to the already favourable conditions that exist in Ireland for aircraft leasing and finance. The adoption of this special insolvency regime was in line with the Government’s International Financial Services Strategy 2020 (IFS2020). Aircraft finance is a subset of the IFS sector, which seeks to grow jobs in the sector over the five year period to 2020.

Ireland’s accession to the Cape Town Convention and subsequent implementation of key provisions of the Convention and the Aircraft Protocol such as Alternative A means that Ireland now qualifies for inclusion on the “Cape Town List”. Ireland was officially added to the List on 30th August 2018. Under the terms of the OECD Aircraft Sectoral Understanding on Export Credits, States that have been deemed to apply key provisions of Cape Town qualify for a discount on the prescribed minimum premium rate. This was a specific deliverable for the Department under the IFS2020 Strategy 2018 Action Plan.

Such actions provide support to the aircraft leasing sector and in turn encourage the development of the wider aviation value-chain in areas such as MRO, continuing airworthiness, aircraft transitioning, design and component services.

MRO organisations include line and heavy maintenance of civil aircraft, as well as repair and overhaul of every part of an aircraft, including engines, electronic components, and avionics, instruments, and aircraft structures. The MRO industry provides essential services to airlines and leasing companies including critical airport-centric services. Since the publication of the NAP, the Department has taken a number of measures to increase the level of MRO activity.

Most notably, in response to recommendations made by the NCADF, which sought to develop a strategic plan for growth of MRO and related enterprises, the Department initiated a series of cross-government engagements with Department of Business, Enterprise and Innovation (DBEI) and also with the Department of Education and Skills (DES) in order to formulate the response of Government to the NCADF Recommendation.

The Department commissioned independent consultants to provide a comprehensive overview of the MRO sector in Ireland, evaluating the sectors contribution to the Irish economy and to identify challenges and also opportunities and actions designed to encourage the expansion of the MRO sector in Ireland.

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Brian Smyth, DTTAS, chair of the MRO Evaluation Steering Group notes

“The consistent predictions of increasing demand internationally for air transport services potentially represent an opportunity for Irish MRO and a host of ancillary enterprises. One of the key aims of the National Aviation Policy is to support Ireland’s wider aviation enterprise sector. It is timely now to take stock of challenges, and of course opportunities, to help inform the future strategic direction to encourage the growth of MRO.”

- Shannon Group, in cooperation with IDA and Enterprise Ireland, continues to grow the globally recognised and internationally competitive IASC aviation cluster in and around the Shannon Airport campus, with 70 companies, and growing, located in Shannon. In order to expand existing operations and to develop new niche opportunities in aeronautical and aerospace engineering, Shannon Group has plans to invest in excess of €150 million over the coming years. This includes the construction of a wide body paint hangar at Shannon Airport, and the development of the Group’s considerable property portfolio to deliver high quality advanced manufacturing, warehousing and office space solutions.
Policy Area Seven: General Aviation, Education and Training

Policy Position: Corporate Aviation
The role of General Aviation and corporate aviation in supporting specific businesses in the aviation sector, particularly in a regional context, is recognised and will be supported.

- The IAA continues its work in the general and corporate aviation sectors e.g. active participation in the development of the EASA Roadmap for General Aviation and will report progress to the NCADF as appropriate.

- Both Dublin and Shannon Airports are continuing to exploit the unique opportunity afforded by preclearance to support General Aviation, with numbers using the preclearance facilities at both airports continuing to increase. The Department is progressing engagement with the US on amendments to the Ireland US Preclearance Agreement which will allow for staffing flexibilities to facilitate this growth.

EDUCATION / MAINTENANCE LICENSING/ PILOT LICENSING
- The NCADF’s Training, Skills and Education Working Group recommendations provided a new focus on the aviation training sector, with an emphasis on pilot training. During the Department’s cross-government engagement it became apparent that if the ambition of the industry is to be achieved it is first necessary to improve the quality assurance
elements of the training provision. As set out in the Report to the NCADF Steering Committee on Government Departments Responses a number of supports are readily available to assist the industry and / or training providers, to help improve the quality of training provision and move towards formal accreditation, i.e. programme validation on the National Framework of Qualifications (NFQ).

- As regards pilot licensing, the Department and the IAA will continue to work closely with EASA. While the revised EASA Basic Regulation has not changed the scope for pilot licensing it is envisaged some changes to the Aircrew Regulation may open up the use of Annex I type aircraft for additional use.

**RECREATIONAL AND SPORT FLYING (GENERAL AVIATION)**

- The IAA was closely involved in the drafting of the New EASA Basic Regulation (EU) 2018/1139 which was signed by the EU Parliament and Council on 4th July 2018, and entered into force on 11 September 2018. This new regulation provides the high level legal framework for a number of provisions that will have a positive effect on the General Aviation (GA) sector. In accordance with the transitional provisions contained in the Regulation, EASA is required to issue opinions concerning proposed amendments to Commission Regulations in the areas of Initial Airworthiness, Continuing Airworthiness, Aircrew and Air Operations. The IAA will continue to work with EASA in developing these opinions.

- GA is showing some growth in recent years generally in line with improved economic conditions. The New EASA Basic Regulation and the resulting future amendments to existing Regulations should promote and continue this growth. Better use of current and future technology will improve the safety of GA aircraft.
Since the publication of the NAP, the Department has worked to develop and enhance the statistical data published in the Department’s website. Statistics on Ireland’s State and regional Airports are now available on a quarterly basis. The statistics include data on passenger numbers, commercial movements and cargo.

Given the crucial role of aviation in Ireland’s economy, these datasets give an insight into the health and future prospects of Ireland’s aviation industry as well as Ireland’s economy as a whole. The statistics help inform Ireland’s aviation and airports future policies and also provide evidence of the effects of aviation policy on the industry.

As well as statistical data on passenger numbers, new routes, cargo movements and airport commercial movements at the State Airports, data from Ireland’s network of regional airports is now made available on a quarterly basis. The Department continues to engage with key stakeholders, including airports, carriers and state agencies on the further development of an aviation dataset.

Policy Area Eight: Statistics

Policy Position
A central repository of relevant statistical information will be put in place to assist policy formation.
The NAP recognises the important contribution of stakeholder engagement in the development and implementation of policy at national level and in influencing international policy affecting aviation in Ireland. The NAP sought specifically to further improve on existing consultation arrangements through the NCADF. The Forum since its formation in February 2016, (one of three consultative structures under the auspices of the Department)\(^7\), is proving successful in strengthening the collaborative efforts of aviation stakeholders on a range of issues of interest.

The Minister for Transport, Tourism and Sport brought the recommendations of the Forum to the Cabinet in January 2017. The Government endorsed the continued operation of the Forum and opened a pathway for further cross-Departmental engagement on aviation sector matters. The NCADF Conference in February 2017 further raised the profile of the Forum highlighting the commitment of aviation stakeholders at the highest levels to work collaboratively.

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7 National Civil Aviation Security Committee (NCASC), National Facilitation Committee (FAL)
The Response of Government to the NCADF recommendations (published October 2017) which was the culmination of a number of months of direct engagement by the Department, resulting in official cross-Government positions outlined progress on a number of matters. It, more importantly, also provided in a concise manner clarity for industry on relevant policy positions affecting aviation and a focus on the supports available to the sector which are key to the realisation of many of the actions proposed. For the most part the industry itself in many instances would require further action to fully realise its ambitions whether through the use of its own resources and / or in conjunction with the State supports highlighted in the report.

Taking into account the views of the Forum membership, the NCADF structures were consolidated in early 2018, noting that the Aircraft Leasing and Training, Skills and Education working groups have effectively concluded their work for the present. The Regulatory Framework group continues to provide opportunities for consultation and stakeholder debate across a range of regulatory and policy issues, most notably issues such as Brexit.

The following are represented at the Regulatory Framework Working Group: Aer Lingus, CAR, daa, DTTAS, IAA, IBEC/FAEI, Ireland West Airport (for regional airports), Ryanair and Shannon Airport.

**Quote from current Chair of the Regulatory Framework Working Group, Laurence Gourley, (Aer Lingus)**

"The value of the Forum to date has been in bringing together the views of the range of stakeholders in Irish aviation, focusing where feasible on presenting a consensus on a range of issues affecting the sector. The NCADF in presenting this unified approach delivers a strong message in support of the Irish aviation sector."
Appendix 1: 
Actions – Status

Actioned 84%
Completed + 12%
Not yet commenced/ Overtaken by events 4%

Legend

<table>
<thead>
<tr>
<th>Actioned</th>
<th>Completed</th>
<th>Not yet commenced/ Overtaken by events</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1</td>
<td>Ireland, as part of the ABIS Group, will seek nomination for election to the ICAO Council for the period 2016-2019.</td>
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<tr>
<td>1.2</td>
<td>The Department of Transport, Tourism and Sport will consult with the National Civil Aviation Development Forum (see Chapter 9) on the development of the international legislative and regulatory agendas.</td>
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<tr>
<td>1.3</td>
<td>Ireland will input to the proposed EU Aviation Package at an early stage to influence the development of proposed measures.</td>
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<tr>
<td>2.1.1</td>
<td>Ireland, through the Department and the IAA, will play an active role in the development of aviation safety regulations at an EU level and in ICAO.</td>
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<tr>
<td>2.1.2</td>
<td>Ireland will continue to maintain an independent safety investigation authority for the investigation of aviation occurrences.</td>
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<td>2.1.3</td>
<td>The Department and the IAA will coordinate the State Safety Programme, including risk management.</td>
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<tr>
<td>2.1.4</td>
<td>Ireland will continue to facilitate and promote occurrence reporting in accordance with EU law and ICAO requirements and to meet the highest standards of independent accident investigation.</td>
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<tr>
<td>2.1.5</td>
<td>The IAA will establish and monitor appropriate key aviation safety indicators based on the EASA system.</td>
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<tr>
<td>2.1.6</td>
<td>The IAA and AAIU will monitor aviation safety trends through ECCAIRS analysis.</td>
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2.1.7 Ireland will contribute to work at EU level to develop and implement an appropriate EU-wide safety regulatory framework for the operation of Remotely Piloted Aviation Systems in civilian airspace.

2.2.1 Ireland will allow greater flexibility to industry through the introduction of an outcome-focused risk-based approach to security regulation.

2.2.2 Ireland will introduce a more targeted and comprehensive approach to compliance monitoring developing requirements for SeMS, similar to the successful approach already implemented in the field of safety.

2.2.3 Ireland will place a risk-based approach to security at the heart of our thinking and of our future research. As a first step in this direction we will initiate a feasibility study in 2015, in conjunction with other key stakeholders, on the concept of a “Trusted Traveller” Programme.

2.3.1 Ireland will work with European partners to achieve the development of global international standards for market-based measures on aircraft emissions.

2.3.2 Ireland will develop its aviation emissions reporting capability in support of ICAO’s evolving environmental policies.

2.3.3 Ireland will, in consultation with interested parties, update its National Action Plan for Emissions Reductions in 2015 in line with the ICAO 2013 Resolution on Climate Change.

2.3.4 Ireland will encourage research and development in Ireland of clean engine technologies and sustainable fuels.

2.3.5 Ireland will implement a “Balanced Approach” to noise management at Irish airports in accordance with Regulation (EC) No. 598 of 2014 on the establishment of rules and procedures with regard to the introduction of noise-related operating restrictions at Union airports.

2.3.6 Ireland will develop an Adaptation Plan for the Transport Sector, which will include adaptation options for airports and aviation services in line with national legislative obligations and the EU Adaptation Strategy.

3.1.1 The Department will increase and extend Ireland’s bilateral agreements with other states.

3.1.2 Ireland will continue to actively support EU efforts to negotiate full Open Skies agreements with third countries.

3.3.1 An overall freight policy for Ireland, covering all modes, will be developed with a view to ensuring the continued competitiveness of the freight sector, and will include consideration of the role of air-cargo.

3.3.2 The Department will seek to remove limits on all air-cargo capacity in Ireland’s bilateral air transport agreements.

3.3.3 The Department will engage with the relevant stakeholders under the auspices of the National Facilitation Committee on air-cargo. (See Section 4.6).

3.3.4 Dublin and Shannon Airports, in partnership with the other players in the air-cargo industry, will be mandated to develop and publish strategies on air-cargo.

3.3.5 The development of Shannon Airport as an air-cargo hub will be supported.
<table>
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<tr>
<th>Section</th>
<th>Text</th>
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<tbody>
<tr>
<td>3.3.6</td>
<td>The Department will continue to liaise with other Government bodies and the US authorities on the regime for exports to the US in order to facilitate efficient freight operations at airports.</td>
</tr>
<tr>
<td>3.4.1</td>
<td>The Department will maintain close formal links with the US authorities to ensure the continued delivery and development of US Preclearance facilities at Dublin and Shannon Airports.</td>
</tr>
<tr>
<td>3.4.2</td>
<td>The Department will encourage Dublin and Shannon Airports and airlines to maximise the benefits to Ireland of preclearance facilities and will promote the development of those airports as preclearance centres.</td>
</tr>
<tr>
<td>3.4.3</td>
<td>The Department will support Shannon Airport in seeking to increase the number of GA aircraft utilising preclearance.</td>
</tr>
<tr>
<td>3.5.1</td>
<td>Ireland will continue to encourage investments in modern, technologically advanced, cost-efficient aviation infrastructure, including those that underpin Ireland’s interest in the North Atlantic and the future traffic growth at our airports.</td>
</tr>
<tr>
<td>4.1.1</td>
<td>The Department will monitor the business development of all airports for evidence that the prevailing network is operating at an optimum level. Monitoring will occur within the framework of developments under EU rules and the structural and capacity reviews referred to in sections 4.4.</td>
</tr>
<tr>
<td>4.1.2</td>
<td>The Department, the airports and the tourism agencies will continue to work together to increase access to Ireland from high-potential overseas tourism markets.</td>
</tr>
<tr>
<td>4.2.1</td>
<td>Ireland will implement an EU approved Framework (Regional Airports Programme 2015 - 2019) of supports for regional airports.</td>
</tr>
<tr>
<td>4.2.2</td>
<td>Exchequer support for operational expenditure at regional airports will be phased out over a maximum period of 10 years, in accordance with EU Guidelines.</td>
</tr>
<tr>
<td>4.2.3</td>
<td>Exchequer support for capital expenditure will be limited to safety and security related expenditure.</td>
</tr>
<tr>
<td>4.2.4</td>
<td>Clear business plans will be required from the airports seeking supports. In considering funding to regional airports, the Department will take account of the level of regional involvement, including investment by local authorities and / or business.</td>
</tr>
<tr>
<td>4.2.5</td>
<td>From 2015, PSO contracts, for Donegal/Dublin and Kerry/Dublin air services will run for two years initially and, subject to a satisfactory review after 18 months, may be extended by a maximum of one year.</td>
</tr>
<tr>
<td>4.3.1</td>
<td>Dublin Airport will be promoted as a secondary hub airport.</td>
</tr>
<tr>
<td>4.3.2</td>
<td>The roles of the Cork and Shannon airports as key tourism and business gateways for their regions, and particularly with regard to the development of key niche markets, will be supported.</td>
</tr>
<tr>
<td>4.4.1</td>
<td>The Department will review the ownership and operational structure of the State airports in 2019 (and subsequently at 5-year intervals). The initial review will incorporate a fresh consideration of the feasibility of establishing Cork as an independent airport.</td>
</tr>
<tr>
<td>Proposal</td>
<td>Description</td>
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<tr>
<td>4.5.1</td>
<td>The process to develop the second runway at Dublin Airport will commence, to ensure the infrastructure necessary for the airport’s position as a secondary hub and operate to global markets without weight restrictions is available when needed.</td>
</tr>
<tr>
<td>4.5.2</td>
<td>The Department will commission a high-level, strategic capacity review in 2018, taking into account wider government objectives and policies for enterprise and tourism as well as developments in the global market. The views of airport users will be taken into account during the capacity review process.</td>
</tr>
<tr>
<td>4.5.3</td>
<td>Taking account of the high-level, strategic capacity review, Dublin, Cork and Shannon Airports will be mandated to carry out reviews of capacity constraints and infrastructure needs at five yearly intervals, the first reviews to be completed before the end of 2018.</td>
</tr>
<tr>
<td>4.5.4</td>
<td>Access to the airports will be taken into account during the development of surface transport programmes, in line with the Department’s Strategic Framework for Investment in Land Transport which proposed the prioritisation of improved connections to key seaports and airports.</td>
</tr>
<tr>
<td>4.6.1</td>
<td>The Department will continue to host the National FAL Committee meetings with a view to better coordination of facilitation activities between Government Departments and relevant stakeholders.</td>
</tr>
<tr>
<td>4.6.2</td>
<td>The Department will facilitate implementation of the National Air Transport Facilitation Programme 2015 - 2017, and ensure it is reviewed by the FAL Committee every three years.</td>
</tr>
<tr>
<td>4.6.3</td>
<td>In line with the Department’s Tourism Policy, airports will be encouraged to prioritise investment in visitor reception facilities in order to remove bottlenecks and to create a welcoming environment for visitors.</td>
</tr>
<tr>
<td>4.7.1</td>
<td>The Department will support the further development of the British Irish Visa Scheme and other enhancements of the visa system to promote growth in tourism and business visits to Ireland.</td>
</tr>
<tr>
<td>4.7.2</td>
<td>The Department, in conjunction with the Department of Justice and Equality, will encourage airports to streamline passenger flows taking full advantage of the Common Travel Area.</td>
</tr>
<tr>
<td>5.1.1</td>
<td>An independent review of airport charges regulation will be completed by end-2015. The review will deliver options and recommendations for a future regulatory system for airport charges. The process will involve full consultation with impacted parties.</td>
</tr>
<tr>
<td>5.1.2</td>
<td>The Department will finalise and publish its policy on airport charges regulation, and make preparations for any necessary changes to legislation, by mid-2016.</td>
</tr>
<tr>
<td>5.2.1</td>
<td>The organisational arrangements for provision of safety and economic regulatory oversight will be restructured taking account of the review of the appropriate model for airport charges regulation (see Proposal 5.1.1) and of developments and timelines under the SES legislation. In advance of any restructuring options being pursued, there will be full consultation with impacted parties.</td>
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<td>The National Aviation Policy   Second Progress Report February 2019</td>
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<tr>
<td><strong>5.4.1</strong></td>
<td>Ireland will support the EU’s work in examining the implications arising from the growth in new business models and more complex commercial arrangements for employment in the aviation sector and, in particular, the human factors implications of such arrangements.</td>
</tr>
<tr>
<td><strong>6.1</strong></td>
<td>Ireland will fully adopt the Cape Town ‘Alternative A’ insolvency arrangements, and will promote this benefit for aviation finance.</td>
</tr>
<tr>
<td><strong>6.2</strong></td>
<td>Ireland will advocate for the continued applicability of Article 83bis arrangements at EU level and will actively participate in work on developing ICAO guidance on Article 83bis through participation in the ICAO Task Force established in 2014.</td>
</tr>
<tr>
<td><strong>6.3</strong></td>
<td>Ireland will encourage the development of the International Aviation Services Centre (IASC) at Shannon.</td>
</tr>
<tr>
<td><strong>7.1.1</strong></td>
<td>Ireland will support any regulatory initiatives at EU level to establish a separate corporate aviation sector.</td>
</tr>
<tr>
<td><strong>7.1.2</strong></td>
<td>Ireland will promote the use of US preclearance facilities and of the Executive Jet Register, particularly at Shannon, by the GA sector.</td>
</tr>
<tr>
<td><strong>7.1.3</strong></td>
<td>Shannon will be designated as a ‘Centre of Excellence’ for Business Aviation.</td>
</tr>
<tr>
<td><strong>7.2.1</strong></td>
<td>Ireland will support the continued development of flight training.</td>
</tr>
<tr>
<td><strong>7.2.2</strong></td>
<td>Ireland will, through the NCADF, continue to identify courses and post-qualification certification requirements, in the development of technical and business degrees, to meet the needs of the Irish aviation industry.</td>
</tr>
<tr>
<td><strong>7.2.3</strong></td>
<td>Initiatives between education and industry, industry and / or airport partners will also continue to be encouraged and supported.</td>
</tr>
<tr>
<td><strong>7.3.1</strong></td>
<td>Ireland will support the development of opportunities for work placement programmes for aviation industry students and for professionals from aviation and other relevant backgrounds to take up employment in the aerospace sector.</td>
</tr>
<tr>
<td><strong>7.3.2</strong></td>
<td>Ireland will support the continued development of aircraft maintenance training. The IAA will continue to work closely with airlines, MROs and FÁS / Solas to develop and improve the aircraft mechanic apprenticeship and traineeships, to meet the changing requirements of the aviation maintenance sector.</td>
</tr>
<tr>
<td><strong>7.3.3</strong></td>
<td>Ireland, through the IAA, will continue to work with other European Member States and EASA with a view to developing appropriate maintenance licence requirements for light aeroplanes, balloons and sailplanes.</td>
</tr>
<tr>
<td><strong>7.4.1</strong></td>
<td>The Department and the IAA will continue to work closely with EASA towards the elimination of anomalies in the requirements for pilot licences, including the potential extension of the mutual recognition of licences in EU states.</td>
</tr>
<tr>
<td><strong>7.5.1</strong></td>
<td>The IAA will work closely with EASA regarding future developments in the EU regulatory regime affecting the GA sector.</td>
</tr>
<tr>
<td><strong>8.1</strong></td>
<td>The Department will publish basic statistical information on its website, including passenger numbers (international, transit, domestic, etc.), new routes, cargo carried and airport commercial movements by end-2015.</td>
</tr>
<tr>
<td><strong>8.2</strong></td>
<td>The Department will develop this dataset in 2016 following engagement with key stakeholders to identify and prioritise additional statistical information required by the industry.</td>
</tr>
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<td>Section</td>
<td>Text</td>
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<tr>
<td>8.3</td>
<td>As part of that process, a decision will be made before end-2016 on optimal organisational arrangements for the collection and dissemination of the agreed dataset.</td>
</tr>
<tr>
<td>8.4</td>
<td>A review of the range and relevancy of the data published will be carried out by the Department in 2020, with further reviews being carried out every 5 years thereafter.</td>
</tr>
<tr>
<td>9.1</td>
<td>Ireland will establish a National Aviation Development Forum (NCADF) led by the Department of Transport Tourism and Sport and with appropriate representation from across Government and the industry.</td>
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</tbody>
</table>
Appendix 2: Selected published output from the NCADF
(all publications available on www.dttas.ie)

TERMS OF REFERENCE
- National Civil Aviation Development Forum (NCADF): Terms of Reference – NCADF

STEERING COMMITTEE
- Minutes of 1st meeting of Steering Committee (29 April 2016).
- Minutes of 2nd meeting of Steering Committee (9 September 2016).
- Minutes of 3rd meeting of Steering Committee (25 November 2016)

NCADF REPORTS
- November 2016 - Report of the National Civil Aviation Development Forum (NCADF): Proposals to the Minister of Transport, Tourism and Sport and Government to advance action in support of the National Aviation Policy for Ireland
- November 2016 – 1st Progress Report to the National Civil Aviation Development Forum on the National Aviation Policy Action Plan
- October 2017 – Department of TTAS Report to the NCADF Steering Committee on Government Departments’ responses to NCADF Report Recommended Actions
  - Recommended Actions Summary Status tables for
    - Regulatory Framework
    - Aircraft Leasing and Finance
    - Aircraft Maintenance, Repair and Overhaul and related enterprises
    - (Aviation) Training, Skills and Education
## Appendix 3: Acronyms

<table>
<thead>
<tr>
<th>ACRONYM</th>
<th>TITLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>AAIU</td>
<td>Air Accident Investigation Unit</td>
</tr>
<tr>
<td>ABIS Group</td>
<td>Austria, Belgium, Croatia, Ireland, Luxembourg, The Netherlands, Portugal and Switzerland</td>
</tr>
<tr>
<td>ATM</td>
<td>Air Traffic Management</td>
</tr>
<tr>
<td>CAPEX</td>
<td>Capital Expenditure</td>
</tr>
<tr>
<td>DTTAS</td>
<td>Department of Transport, Tourism, and Sport</td>
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<tr>
<td>EASA</td>
<td>European Aviation Safety Agency</td>
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<tr>
<td>ECAC</td>
<td>European Civil Aviation Conference</td>
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<tr>
<td>ECCAIRS</td>
<td>European Centrally Coordinated Accident and Incident Reporting System</td>
</tr>
<tr>
<td>EU</td>
<td>European Union</td>
</tr>
<tr>
<td>GA</td>
<td>General Aviation</td>
</tr>
<tr>
<td>GMBM</td>
<td>Global Market Based Measure</td>
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<tr>
<td>IAA</td>
<td>Irish Aviation Authority</td>
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<tr>
<td>IASC</td>
<td>Irish Aviation Services Centre</td>
</tr>
<tr>
<td>ICAN</td>
<td>ICAO Air Services Negotiation Event</td>
</tr>
<tr>
<td>ICAO</td>
<td>International Civil Aviation Organisation</td>
</tr>
<tr>
<td>NCADF</td>
<td>National Civil Aviation Development Forum</td>
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<tr>
<td>NCASC</td>
<td>National Civil Aviation Security Programme</td>
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<tr>
<td>NCASP</td>
<td>National Civil Aviation Security Committee</td>
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<tr>
<td>OPEX</td>
<td>Operating Expenditure</td>
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<tr>
<td>PSO</td>
<td>Public Services Obligation</td>
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<tr>
<td>SeMS</td>
<td>Security Management System</td>
</tr>
<tr>
<td>SES</td>
<td>Single European Sky</td>
</tr>
<tr>
<td>SESAR</td>
<td>Single European Sky ATM Research</td>
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<tr>
<td>TSA</td>
<td>Transportation Security Administration</td>
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