

Building the ASEAN Community

ASEAN Single Aviation Market

One Sky, One Region



The aviation industry in ASEAN has recorded significant growth over the past few years. The total seat capacity of ASEAN airlines experienced double-digit growth in the four-year period of 2009-2013, and the share of low-cost carriers (LCC) in the region increased significantly from 13.2 per cent in 2003 to 57 per cent in 2014¹. The enhanced air connectivity has also contributed to the steady growth of the ASEAN tourism industry at an annual average rate of almost 10% in the last decade.

Given the importance of this industry, the Roadmap for Integration of Air Travel Sector (RIATS) was adopted to set out the goals and timelines for ASEAN to put in place necessary frameworks for the realisation of the ASEAN Open Skies policy by

2015. To date, all frameworks for the operationalisation of ASEAN Open Skies have been completed, which include the ASEAN Multilateral Agreement on the Full Liberalisation of Air Freight Services (MAFLAFS) the ASEAN Multilateral Agreement on Air Services (MAAS) and the ASEAN Multilateral Agreement on the Full Liberalisation of Passenger Air Services (MAFLPAS). With these agreements, any airlines designated by an ASEAN Member State is allowed to operate both passenger and cargo scheduled services between its home country and a point with international airport in another Member State, and then to a point with international airport of a third Member State, without limitations on capacity and schedule.

Achieving open skies in the region is an important part of the bigger plan to establish an ASEAN Single Aviation Market (ASAM) aimed to expand and deepen integration in all aspects of the aviation sector, including air services liberalization, aviation safety and security, and air traffic management. The specific economic issues to be addressed under the ASAM Implementation Framework include ownership and control of airlines and other business entities involved in the aviation industry, liberalisation of air transport ancillary services, competition laws, and customer-welfare-related issues such as consumer protection, tariffs and airport user charges.

In parallel with the efforts to realise open skies and establish a single aviation market within the region, ASEAN is also reaching out to engage and work with ASEAN's Dialogue Partners to enhance air connectivity with the major market partners. The implementation of this measure has further strengthened collaboration with China, Japan, the Republic of Korea, the United States, and the European Union, in many sectors of aviation including economic components, aviation safety, aviation security and air traffic management through close and regular consultations.

¹ Centre for Asia Pacific. Data accessed as of August 2015

TO LEARN MORE

1. [Roadmap for Integration of Air Travel Sector](#)
2. [Implementation Framework of ASAM](#)

For more information, please visit <http://www.asean.org/communities/asean-economic-community/category/overview-17> or send an email to aimo@asean.org