

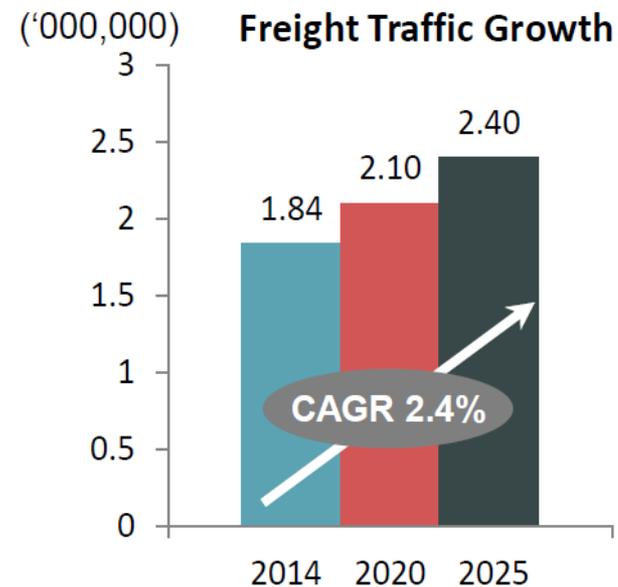
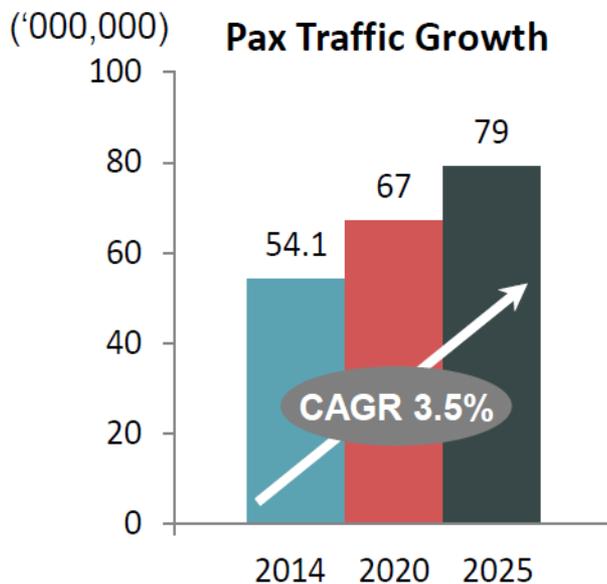


Where does the State start in setting up a national NGAP strategy?

Mr Ong Chun Yang
Deputy Director, Aviation Industry Division
13 December 2018

Growth of Singapore's Air Transport Sector

- Aviation contributes up to **6% of national GDP**
- Enabler of economic growth; supports other sectors of the economy
- Passenger traffic is projected to grow by **1.5 times by 2025**; Cargo traffic is projected to **grow by 1.3 times by 2025**



- New infrastructural developments will provide capacity to meet growing traffic demand beyond 2025

Expansion of Airport Capacity

Terminal 4



New Seletar Passenger Terminal



Jewel Changi and Terminal 1 Expansion



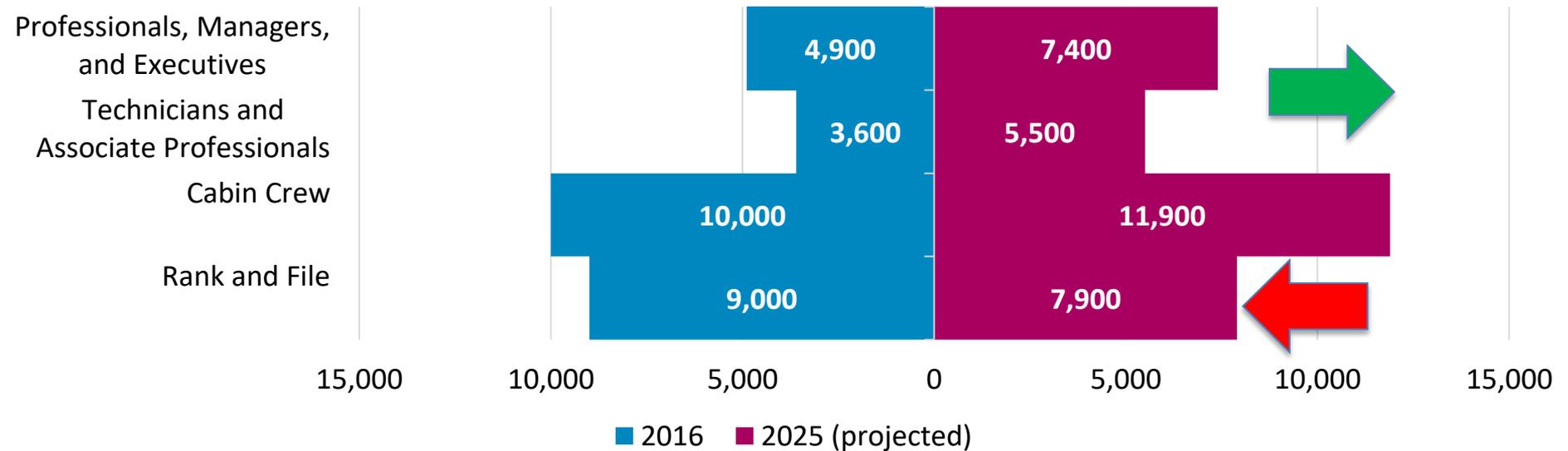
Third Runway and Terminal 5



Profile of Air Transport Workforce

- Real value-add per worker: \$251,000
- As sector grows, we expect the workforce to grow in size as well, resulting in a demand for more workers to fill job vacancies in the sector
- With technology transformation efforts, we also expect the proportion of RAF jobs to shrink as a portion of them would be upskilled and converted to TAP and PME jobs.

Projected Change in Workforce Profile



Challenges of Air Transport Workforce

DEMOGRAPHIC CHALLENGES

- Low birth rates and shrinking workforce
- Ageing population
- Limit on foreign worker dependency



EVOLVING ASPIRATIONS OF WORKERS

- Desire “good jobs”
 - well-remunerated
 - career and education progression
 - comfortable working environment
 - technologically savvy



Workforce demand growth
(2.4% CAGR) > Workforce supply growth
(1% CAGR)

Air transport jobs are manual, require shift duties, or are customer-facing roles, and may not meet the expectations of fresh graduates

Difficulty in attracting and retaining sufficient workers to fully realise the growth of the air transport sector

Transforming Aviation Together

Air Transport Industry Transformation Map

Our Vision

We aim to create:

- A vibrant and quality air hub for our economy and nation
- Better jobs for Singaporeans
- An efficient and smart airport for users and passengers

Our Strategies

Innovation

Break new ground:

- 1 Pioneer novel solutions
- 2 Partner national research communities
- 3 Strengthen core capabilities

Productivity

Improve jobs:

- 1 Accelerate use of technology
- 2 Redesign work processes
- 3 Encourage new ways of doing business

Jobs & Skills

Develop workers:

- 1 Expand education options for students
- 2 Ease entry into aviation
- 3 Support professional growth
- 4 Share productivity gains

Enterprise

Enable new ideas:

Develop new businesses together

Four Pillars of Industry Transformation

#1: INNOVATION

Pioneer novel solutions, partner research communities, and strengthen core capabilities



#2: PRODUCTIVITY

Accelerate use of technology, redesign job processes, find new ways of doing business



Technology, digitization, and automation will change work processes and improve the quality and attractiveness of aviation jobs

Four Pillars of Industry Transformation

#3: JOBS & SKILLS

Expand education options of students, support professional growth, share productivity gains



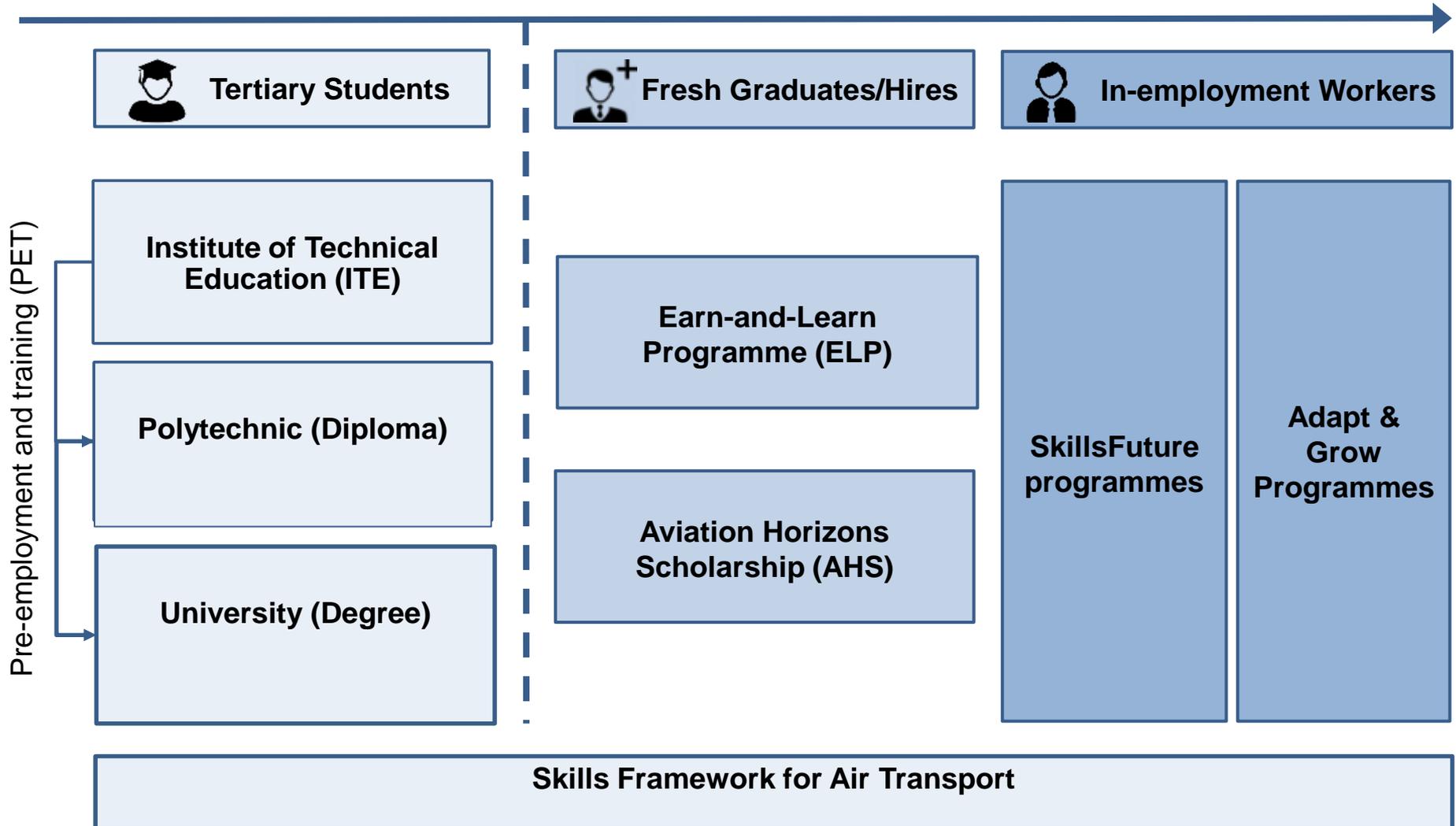
#4: ENTERPRISE

Develop new business together



Prepare the future workforce for emerging skillsets and to take up new jobs and work tasks in the sector

Life Cycle Approach for Manpower Development



Seeding the Talent Pipeline



Partnership with Singapore Scout Association (SSA) and Schools



Inspiring Aviator's Talks



Aviation Learning Journeys



Aviation Open House



"We Are Aviators" Facebook Page

Manpower Development is a Collective Effort by the Air Transport Community

Government Agencies



Unions



Industry



Thank you

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