

New Zealand Helicopter Association

Participatory Workshops

Report on Queenstown and Auckland Workshops held February and March 2010

For Discussion and Confirmation on 6th May

Prepared for:

NZHA Executive Committee

Prepared by:

Lynette Wharfe - The AgriBusiness Group

Michelle Rush – Michelle Rush Consulting Ltd

29 April 2010

The AgriBusiness Group

PO Box 10824
The Terrace
Wellington 6143
New Zealand

lynette@agribusinessgroup.com

Michelle Rush Consulting Ltd

PO Box 29001
Ngaio
Wellington 6443
New Zealand

rush.m@xtra.co.nz

Table of Contents

Purpose and Structure of this report.....	3
Background to the Workshops	4
Summary of Workshop Results.....	7
Discussion	12
Recommendations and Next Steps	15
Appendix One – Queenstown Workshop Results.....	19
Appendix Two – Auckland Workshop Results	21

Purpose and Structure of this report

Purpose

This report summarises the results of two participatory workshops held with members of New Zealand's helicopter community that were hosted by NZHA in February and March 2010.

A brief discussion of the results is included, along with recommendations for the next steps to follow up and implement the workshop findings.

Report Structure

The report includes the following sections:

- Background to the Workshops
 - Summary of Workshop Results
 - Discussion
 - Recommendations and Next Steps
-

Background to the Workshops

Background

This section briefly describes:

- New Zealand's helicopter community as it is today
- The establishment of the NZHA
- The purpose and reasons for the two participatory workshops held
- Workshop numbers and the nature of the attendees
- Value of the workshops to attendees.

NZ's helicopter community

There are currently about 760 helicopters in NZ carrying out a wide range of operations including:

- Air ambulance
- Search and Rescue
- Fire fighting and lighting
- Tourism
- Agriculture, Horticulture and Viticulture (including spraying, fertiliser, VTA's (baits) and frost protection)
- Oil and exploration
- Forestry and logging
- Lifting
- Wires – stringing and marking
- Wild Animal Recovery
- Heli-hunting
- Filming
- Military
- Law Enforcement
- Private use.

The type of operations varies across the country, as do the business structures of various operators. Business structures include single operators, corporates and commercial companies, trusts and government departments. Whilst many of the things individual helicopter operators deal with relate to their specific use, there are a range of generic matters that every helicopter operation must address, including:

- Technical, for example equipment required for specific tasks (winches, buckets, strops; maintenance control)
- Regulatory, for example noise controls in district plans
- Operational, for example CAA rules 91, 133 135
- Financial, for example charge out rates, profitability
- Training and staffing, for example competency checks and the level and quality of training.

Increasing concern about the impact of some of these matters, for example noise rules and landing restrictions on helicopters, was a factor in establishment of a new industry organisation, the New Zealand Helicopter Association, with a specific mandate to advocate for the rights and interests of helicopter operators.

Establishment of NZHA The NZ Helicopter Association (NZHA) was formed in 2009 as a division within the Aviation Industry Association of NZ (AIA), with the role of advocating on behalf of all helicopter operators and pilots in New Zealand.

The Association's Executive Committee was appointed in mid 2009 and undertook to develop a mission statement to help guide the future direction and priority activities of the Executive on behalf of the Association.

Early in this process, it was quickly apparent to the Committee that they needed to get a much clearer idea from helicopter operators and pilots themselves on what the priority issues were.

After hearing of the success of a process called 'participatory appraisal' used to gain the ideas and views from members of the Agricultural Aviation Association, the Executive Committee commissioned two consultants with experience of participatory approaches to conduct some workshops. A participatory approach enables all attendees to participate and contribute fully to workshop activities and discussions. Everyone involved gains a better understanding of their industry's situation and its threats and opportunities, benefiting both participants and organisers.

Workshop purpose

Lynette Wharfe and Michelle Rush were the independent consultants asked to facilitate two initial participatory workshops.

The main purpose of the workshops was to hear first hand the needs and issues of the helicopter community, and as part of this, to encourage Association membership. Specific workshop objectives were to identify:

- Current and future threats to continued operation
- Key issues, both local and national and priorities among these
- Areas where NZHA can add value to helicopter operations and businesses
- Key people and organisations that the helicopter industry needs to engage with and
- Opportunities for collaboration on common issues.

The workshops also gathered ideas for the next steps.

Workshop attendees

The workshop registration forms provided the following statistics:

25 people attended the Queenstown workshop held February 16 2010.
23 people attended the Auckland workshop, held March 12 2010.

In total, 48 people attended, most of who were pilots. Many of these pilots were also owners and/or business operators. There was also a CAA representative (Queenstown), a company manager, QA provider, AAA member, trainers, suppliers and a private user.

Attendees came from Southland to as far north as Auckland's North Shore. Areas unrepresented were Northland, Bay of Plenty, Gisborne-Hawke's Bay,

Wellington, Manawatu and Nelson.

**Value of the
Workshop to
Attendees**

Participant feedback was gathered at both workshops, primarily through an evaluation exercise completed at the close of the workshop, as well as through verbal feedback given during the closing discussion.

A summary of this feedback shows:

- The workshops were a success – the average scores for how people found the workshop (out of 10) were 8.5 (Queenstown) and 7.5 (Auckland), with no scores below 5 at either workshop.
 - More than half the participants in Queenstown and a good number of Auckland participants valued the opportunity to discuss industry issues and interact with other operators. Comments such as *“Interaction with other operators,” “friendly open discussion,” “sharing of problems facing industry”* and *“learning that the majority of issues are universal”* were made.
 - Some participants, particularly in Auckland, expressed concern about the poor turnout, and would have liked to see more pilots, operators, and other stakeholders, such as CAA, attend.
 - Related to this, was a call for more workshops from some participants. *“Get more persons and companies involved”* and *“Canvas the remainder of the country”* were among the comments made.
 - There was support for an NZHA website to help with communication, and for plans to be communicated with operators.
 - Several participants discussed the need for increased membership and a membership drive. Another commented *“Make new operators realise they need to be part of this movement if they want change within the industry.”*
 - Participants wanted to see timely and considered follow up from the workshops. Comments included:
 - *“Review what resources required to address issues”*
 - *“Use the information to select goals and lobby for those goals to be achieved for the benefit of the HA members”*
 - *“NZHA has to develop strategies to address the issues. It will need some resource to meet expectations”* and
 - *“Recommendations for action plan within 3 months.”*
-

Summary of Workshop Results

Overview

This section briefly describes the activities included in the workshops, and summarises key results from these, including:

- Helicopter community aspects noted as significant
 - The state of interactions and relationships between helicopter operators and others
 - Highlights and low points in the helicopter community's history
 - Threats and issues facing the helicopter community
 - Priorities for action, and who should lead the response
-

Workshop activities

Participants took part in a series of workshop activities, selected results from which are discussed in the paragraphs below. These were:

- Describing facts and statistics about the helicopter community as it is right now
 - Mapping the relationships and interactions between helicopter operators and other stakeholders
 - Describing the history of the helicopter community, significant events and milestones
 - Identifying threats to current and future helicopter operation in NZ.
-

Describing NZ's Helicopter Community

Working in break out groups, participants used pictures, words and symbols to describe NZ's helicopter community – the type of work, the clients, the business structures, the machines and the relevant compliance agencies.

Queenstown participants noted as significant the number of helicopters now operating – more than 750; the large number of one man bands and private operators; and that the Department of Conservation was their largest client [for that geographical area.]

Auckland participants noted as significant the average age of pilots as 50+; expectations of training vs. the syllabus; the high public expectations of helicopter operators for medical transport services, and the application of generic rules for both fixed wing and helicopters by CAA.

Further information: Refer separate ppt files titled Auckland Workshop Photos and Queenstown Workshop Photos.

State of interactions and relationships

Working in break out groups, participants used venn diagrams (interlinking circles) to map relationships and interactions between helicopter operators and others.

Queenstown participants identified relationships with local authorities implementing the Resource Management Act, and DOC implementing its management plans under the Conservation Act as poor. Also mapped as poor was interaction between NZHA, AIA and operators/owners.

CAA relationships were noted as both good and poor for both Queenstown and Auckland.

Auckland participants noted good relationships with weather service providers, but identified that the relationship of skilled and experienced staff with owners/operators could be better.

Further information: Refer separate ppt files titled Auckland Workshop Photos and Queenstown Workshop Photos.

Helicopter community history

Working in break out groups, participants mapped events and milestones in the history of NZ's helicopter community, from the use of the first helicopter to beyond the present day.

Queenstown participants noted the lack of training and a poor aviation culture with resultant high accident rates throughout the 60's and 70's as low points in the community's history. The advent of quality systems, a training syllabus and greater opportunities for students from around 2000 onwards were noted as high points. New technology and advanced, more specialised training now and in the immediate future were also among highlights noted.

Auckland participants noted the founding of AIA around 1950, venison recovery in the 1960's, importation of the Robinson R22, the *Swedavia Report* to CAA in the early 1990's among the other highlights identified. Distortion of *Swedavia/McGregor* directions resulting in anomalies in a rules based system was also identified as a low point.

Further information: Refer separate ppt files titled Auckland Workshop Photos and Queenstown Workshop Photos.

Threats to helicopter operation

An interactive workshop was held to brainstorm, organise and then name and prioritise the threats to helicopter operation in NZ.

Differences in how each workshop organised their ideas, and some misunderstanding of instructions during the session ranking the priorities suggest a degree of caution in reading too much into these results.

The results identified these four top priority issues:

- Environmental controls restricting helicopter operation and consent costs
- Poorly targeted and inconsistent regulation from agencies such as CAA and compliance costs
- Industry practices undermining the sustainability of the industry such as under-charging
- Poor quality helicopter training.

Queenstown's "Management of environmental impacts between competing interests" and Auckland's "RMA consent costs and empowerment of minorities" together represent a series of related environmental and resource management issues seen as a threat to helicopter operation.

Auckland's identified "costs of CAA outweighing benefits" as a top priority and Queenstown identified "poorly targeted regulation" and "compliance costs" also with high scores together represent another group of significant and related compliance and regulatory issues.

Interestingly, the third overall priority issue, "sustainability of the industry" ranked second in Queenstown, whilst its Auckland equivalent "lack of profitability" only ranked sixth.

Auckland and Queenstown both identified poor quality training as an issue, ranking it similarly in importance. Its overall score was fairly close to that for the 'sustainability of the industry' issue. The detailed results highlight a range of concerns including low pilot training standards and consequently inappropriately trained pilots, variable safety cultures, and low hour instructors.

The other issues identified were:

- "public perception of helicopter safety"
- "unpredictable external economic factors"
- "workforce age and experience"
- "brain drain of pilots and engineers"
- "fuel and carbon tax" and
- "Wires."

Further information: See table below. Refer also to Appendix 1 Queenstown Workshop Results and Appendix 2 Auckland Workshop Results.

2010 NZHA participatory workshops - Threats to Helicopter Operation in NZ - Compiled Results Queenstown and Auckland

Key:

Orange = Combined issue

Pink = top 4 priorities

Green = Lead response

ISSUE	COMBINED PRIORITY SCORE		PRIORITY		INDIVIDUAL OPERATOR/BUSINESS		GEOGRAPHIC /REGIONAL AREA		SECTOR, e.g. tourist ops		NATIONAL BODY, NZHA	
			AK	QT	AK	QT	AK	QT	AK	QT	AK	QT
	ISSUE and PRIORITY		WHO SHOULD LEAD RESPONSE									
Management of environmental impacts between competing interests and RMA – consent costs; RMA empowers minorities	63		42	21	1		1	7	1		24	
CAA costs far outweigh benefits	68		43		3						24	20
Compliance costs and time				12		1		1				26
Poorly targeted regulation				13				1				16
Competitive behaviour affecting profitability and sustainability of the helicopter industry	29		9	20	8			1			4	24
Quality and standard of current training - poor outcomes	24		13	11	1	9			4	4		17
Public perception of helicopter safety	18		18		1			2		2		
Unpredictable/Uncontrollable External Economic Factors	12		7	5	7	10					3	1
Wire awareness	10		10		1			5		5	8	
Brain drain of pilots and engineers	1		1		2			5		5	5	
Age and Experience profile of workforce	1			1								9
Fuel and Carbon Tax						1						9

Who should lead response

The results showed a clear preference that a national body such as NZHA should take the lead in a helicopter community response to the top four priority issues.

Leadership from local areas on environmental management was preferred by a small but significant number, and similarly a small but significant number saw individual operators as having a leadership responsibility for dealing with competitive behaviour issues affecting the industry's sustainability.

Leadership from individual businesses and sectors was also preferred by a small but significant number of participants in respect of the training quality issue.

The 'unpredictable economic factors' issue was the only matter for which individual businesses were seen as needing to take the lead response.

Among the other priorities, the preference again as mainly with a national body taking the lead, but some issues, particularly wire awareness, and dealing with the 'brain drain' were seen as also needing some regional and sector leadership.

Discussion

Overview

This section discusses the results. It includes:

- Some cautions that need to be kept in mind when analysing the results.
 - A separate discussion for each of the top four priorities:
 - Environmental management
 - Poorly targeted regulation
 - Unsustainable industry practices
 - Poor quality training
 - An overall discussion of the other priorities.
-

Cautions in analysing results

In analysing the workshop results, the following cautions need to be kept in mind:

- Firstly, the vast majority of participants in these workshops were pilots and operators – the helicopter community encompasses many other support personnel;
 - Secondly, the workshops were attended by just under 50 individuals, and whilst the geographic spread was reasonable, a number of regions were not represented at all;
 - Thirdly, the time constraints at the workshop precluded workshop attendees getting to the core of some of the issues.
-

Environmental Management

The detailed ideas that formed part of the environmental management priority suggest increasing cost burdens, for example in the resource consent process, may be an issue as much as the rules for noise, landing and discharges that affect helicopter operators.

To progress this matter, further work will be needed to clarify the root cause of the issues being raised, e.g. onerous consent costs can be avoided in the first place if reasonable and well-thought out provisions applicable to helicopters are already in relevant sections of district and regional plans.

Ensuring adequate consideration of the helicopter sector in regional and district plans, on such issues as noise, could be progressed by involvement in the plan development process. To do this successfully would require a consistent approach across the country, with the industry developing its own position to guide its advocacy on behalf of operators – and operator buy-in to such positions will be important.

A small but significant number of participants saw a role for geographic representation on these issues – this makes sense, given district and regional plans are prepared locally, and vary in response to specific local conditions and needs. This has implications for decisions about the structure of NZHA. NZHA needs to consider how best to enable local involvement in any future environmental advocacy it may undertake.

Poorly targeted regulation

The detailed ideas behind the ‘poorly targeted regulation’ and ‘compliance costs’ priority focus mainly on CAA matters, and some appear to be part of the concern about application of generic aviation rules, rather than specific rules, to helicopter operation. Inconsistent rules, e.g. differences in DOC requirements between Conservancies were also mentioned. The issues may also reflect the costs of any new procedures or rules being implemented by the regulator as well as the direct cost of the services provided by CAA.

Costs associated with audits also feature. There was a mention of there being too many similar audit procedures required from several different entities, e.g. CAA, client companies e.g. TVNZ, Comalco, and councils.

Progressing this matter will require continuing with existing NZHA efforts, e.g. the work under way with the Department of Conservation to get a standardised policy agreed for helicopters over conservation land.

It will also require, in the same manner as the environmental management issue, getting clear on the specifics of the problem and its root causes; and from there developing some agreed positions and preferred solutions with the helicopter community as a whole. The matter of auditing is one example, and the matter of ‘one rule for helicopters’ is another. Many in the helicopter community favour this, but some are not convinced it is the best approach.

Industry sustainability

‘Excessive’ competitive behaviour between operators, for example undercharging, and lifestyle operations, rather than robust business operations, were among the concerns mentioned. The request that a national industry body lead the response to this issue, which is primarily the result of individual operator decisions and choices, will have to be progressed with care. An early step required will be to find out what actions operators have in mind that can be driven from a national level to deal with these types of issues, and the feasibility of these, including implications for NZHA’s shape.

Poor quality training

The relatively younger age and experience of training instructors, the student funding system and poor training standards were among the training issues raised during the workshops.

Three related issues identified at the workshops: the “brain drain of skilled personnel,” “the age and experience profile of the workforce” and “public perception of helicopter safety,” are also relevant when assessing how to approach the training issue.

As with the other priorities, work to develop a clear position, along with identification of the best structure to monitor and contribute to training issues, for example, a training committee, need to be considered.

Other issues

The other issues, in addition to the three mentioned with the discussion of the training issue above were:

- unpredictable/uncontrollable external economic factors
- wire awareness
- fuel costs and carbon tax.

The Executive may wish to assess these through further discussion, and /or consultation with the helicopter community. It could be useful to consider them in terms of their potential impact on the long term sustainability of

helicopter operation in NZ, in making decisions on their priority.

Recommendations and Next Steps

Overview

This section sets out:

Some matters NZHA Executive need to consider in working out what to do next.

Some options and recommendations including:

- follow up to the participatory workshops held to date
- decisions on the shape of NZHA
- development of a strategy for NZHA.

Considerations in deciding what's next

Around 50 people representing some, but not all of the regions and sectors that make up New Zealand's helicopter community, have had the benefit of, and contributed to, workshops identifying the nature of NZ's helicopter community and issues of concern that it is facing.

These representatives identified environmental management, poorly targeted CAA and other agency regulation, business practices undermining industry sustainability, and poor quality training as the four major threats to continued helicopter operation in NZ.

Workshop participants found the experience valuable and enjoyable, and sought that more people take part. Participants are expecting follow up from the workshops.

In determining the next steps, NZHA Executive needs to discuss the following questions and actions:

- a) Should further consultation, for example through additional workshops, be undertaken with the helicopter community?
 - b) What is the best way to clarify the core concerns implicit in each of these priority areas, and therefore the target areas for future advocacy?
 - c) What are the implications of these priorities for NZHA membership, structure, role, function and staffing?
 - d) What does NZHA need to do to:
 - Report back these findings to workshop participants and other NZHA members
 - Consider and decide on priorities both in terms of NZHA activities; and
 - NZHA membership, role, function, structure and staffing.
-

Workshop follow up

To follow up, and build on the workshops already held, there are a number of different options that could be progressed. Here are some possibilities:

1) The Executive Committee seek wider, and more complete consultation with the helicopter community (in terms of regional and sector/personnel representation)

This could be achieved through EITHER:

a) Hosting up to 3 more participatory workshops in regions that had no representatives with the purpose of continuing to raise awareness, understanding and support for issues facing the helicopter community and the role of the NZHA

OR

b) Hosting a participatory workshop to which all participants can attend, at the Helicopter Conference in July to do the same.

OR

c) Hosting a series of regional meetings to do the same, ideally before the industry conference in July, in locations other than Auckland and Queenstown to discuss and confirm the workshop results.

2) The Executive Committee seek to confirm and clarify the issues raised, and seek ideas and views on the actions required to get NZHA to a situation where it can advocate on behalf of the industry on the priorities agreed to.

This could be achieved through:

Presenting the findings of the two workshops including the priority issues and NZHA's intended next steps at the Helicopter Conference in July and then holding a workshop to:

- Test, discuss and clarify the core issues within the priorities that should be focused on;
- Identify the actions required for each agreed priority that will get NZHA into a position where it can begin advocacy on behalf of the industry as a whole.

3) The Executive Committee decide to take its member consultation no further

4) The Executive Committee could decide to circulate a summary of results, along with a statement about the next steps, to workshop participants and other NZHA members.

Shape of NZHA The task of identifying and agreeing as an Executive on recommendations for an appropriate NZHA role and structure is an important next step. Confirming the wording of an NZHA mission statement would ideally be part of this. This could be achieved through:

EITHER:

- a) The Executive Committee confirming the mission wording, and researching and identifying options (and from this, a preferred option) for structures, roles, functions and staffing, including the following matters:
 - a. geographic and sector input and representation
 - b. skills, capabilities and resource requirements (and resource sources)
 - c. potential collaborators, both inside and beyond the aviation sector as a whole.

OR:

- b) The Executive Committee confirming the mission wording, and then seeking professional advice on the other matters as above.

Following this, presentation of a preferred option, followed by discussion and decision with NZHA membership will be necessary.

This could be achieved at the Industry Conference if there is time ahead to prepare a recommendation, or via written or electronic voting means at a later date.

Strategy for NZHA

NZHA is in its early stages. The two workshops held show high levels of expectation around what the organisation could do. There are some urgent and immediate needs, and some longer term ones.

A vital consideration is how the industry will be serviced. One such consideration could be the appointment of an Executive Officer (EO), with appropriate expertise, to work on behalf of the Executive and to advance the priority issues.

The task of developing a strategy to map out the best path forward would be an immediate first task. This will be important both to reassure the membership, and to ensure that NZHA does not over-commit itself.

This could be achieved through:

- The Executive Committee identifying resources for, and seeking appointment of an Executive Officer.
- The Executive Committee directing the EO to build on its existing draft strategy to map out a pathway that takes the organisation from where it is now, to where it is formed into a structure, and engaged in working on agreed priority issues on behalf of the helicopter industry.
- This would need to include activities such as researching and

developing industry positions to guide the advocacy work it does on behalf of members, as well as matters such as communication with members and ongoing resourcing.

ENDS

Appendix One – Queenstown Workshop Results

Results of the workshop activity identifying “Threats to Helicopter Operation in NZ” held in Queenstown 16 February 2010

Note: Results are NOT in priority order.

1 – Management of environmental impacts between competing interests

-
- Environment councils and groups opposing helicopters
- Local body and Resource Management Act (RMA) regulations, e.g. noise, chemical trespass, movement restrictions, rules different from Civil Aviation Authority (CAA)
- Increasing access restrictions, e.g. for landing, take off imposed by local bodies, Department of Conservation (DOC), encroachment of residential areas into rural areas, public complaints etc.
- Local council changes in legislation, e.g. noise, greenies
- Overregulation, e.g. DOC management plans, regional council resource management restrictions
- Lobby groups, e.g. forest and bird, recreational users, holding political clout.

2 Fuel and Carbon Tax

- Future availability of av gas in NZ
- Carbon tax
- Carbon footprint
- Fossil fuel dependence

3 Quality and Standard of Training

- Air accidents – affects all aspects of the industry
- Public perception, public concern about all aspects of helicopter operations, including safety, noise etc
- Inappropriately trained pilots
- Variable safety cultures among pilots and companies
- Wires

4 Age and experience profile of workforce

- Aging skill based among engineers who keep the aircraft in the air
- Future Licensed Aircraft Maintenance Engineer (LAME) experience leaving within next 5-10 years, especially avionics. Lack of experience

5 Uncontrollable External Influences

- Costs of fuel, parts, engineering with variable exchange rate
- Catastrophic world events e.g. SARS, Birdflu, September 11
- US/NZ exchange rate and Euro affecting tourism and aircraft parts
- Lack of competitiveness with Original Equipment Manufacturer (OEM) parts manufacturers causing huge cost increases
- Foreign exchange uncertainty affecting tourism, parts and aircraft

6 Competitive behaviour that affects the sustainability of the helicopter industry

- hourly rates driven down by under-cutting amongst competitors resulting in no profit margins thus lack of ability to progress into new aircraft

- yield/competition – too many helicopters, some operations area ‘way of life’ and not a successful business model
- competition, sustainability
- dishonest time recording impacting on safety and profit
- low pilot wages
- private (non-certified) carrying out operations

7 Poorly targeted regulation

- knee jerk regulation among government, local bodies, CAA and DOC
- ‘red tape’ and onerous regulations – regulations that have no real bearing on aviation safety or environmental safety
- CAA rules that are not enabling i.e. do not recognize the unique ability of helicopters
- CAA costs of compliance, interpretations of rules, changing of rules without consultation
- Government CAA risk is an everyday event – unreasonable expectations leads to more regulation

8 Compliance costs and time

- Audits – too many of similar nature, e.g. CAA, TVNZ, Councils, Comalco
- Compliance
- Inconsistent application of ‘Fit and proper person’ criteria
- Compliance costs – OSH, CAA, NZQA, QUALMARK, audits, re-entry, and entry

Appendix Two – Auckland Workshop Results

Results of the workshop activity identifying “Threats to Helicopter Operation in NZ” held in Auckland March 11 2010

Note: Results are NOT in priority order.

1 Brain drain of pilots and engineers

- loss of experienced personnel offshore
- overseas opportunities for skilled personnel

2 Outcome of current training is substandard

- lowered training standards for pilots
- low standards of training, low hour instructors

3 Costs of CAA far outweighs the benefits

- inappropriate CAA rules relative to helicopter operations
- lack of depth in CAA – loss of aviators having control – at all levels
- cost of disputes – guilty until you prove otherwise
- cost of CAA compliance – audits, PT 135, PT 141 etc

4 Unpredictable Economic Factors

- global economic trends and impact on NZ
- cost of fuel - vulnerable to external factors, e.g. fuel, parts, exchange rates
- parts support and supply and lack of support from manufacturer = A/C down time
- exchange rate unpredictability
- insurance preventing employment of low time pilots – becoming an experienced pilot
- recession – no dosh!

5 Lack of profitability

- too many operators – undercharging
- under-reporting of hours

6 Wire awareness

- poor or no marking of wires
- wire awareness- marking, charting, training, legislation

7 Public perception of helicopter safety

- accident – loss of public confidence

8 RMA – Consent costs; RMA empowers minorities

- RMA – consent cost, empowers minorities
- Cost of disputes and compliance, noise, RMA
- Environmental issues from local and national authorities – DOC – access to land
- Not in my back yard, e.g. perversity of public ‘I love helicopters but not near me’
- Cost of compliance – heliport establishment; RMA issue
- Tree huggers – active minority groups, trying to stop us landing on anything else.