



Why do we need well performing airports?

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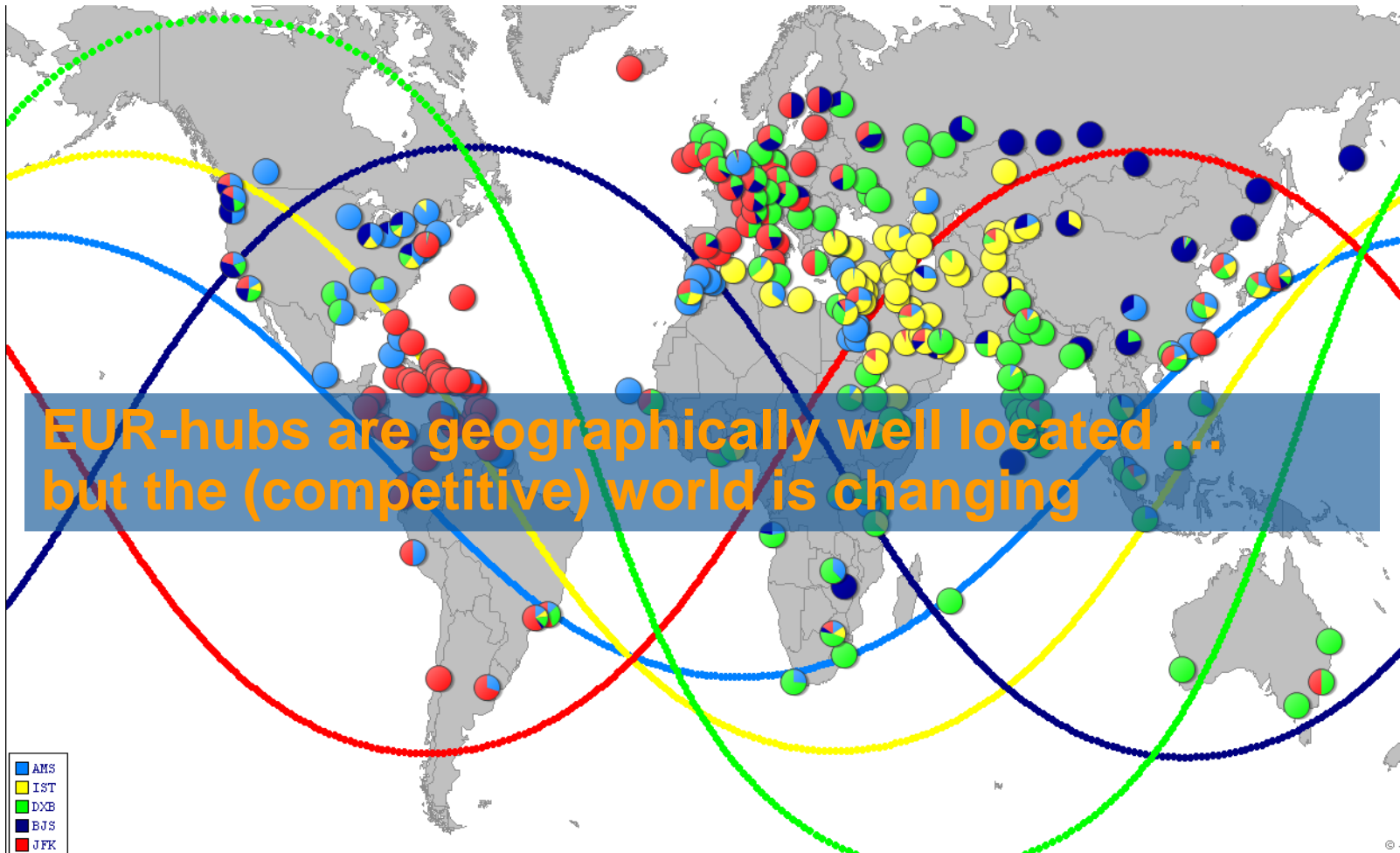
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Presentation outline

- **The European Union in a fast-changing world**
- **What can be done?**
- **Conclusion: we need a competitive aviation value chain and well performing airports are key factor**

The European Union in a fast-changing world

- **The European Union is a key player in worldwide aviation. It represents a third of the world market**
- **But for how long?**
- **The competitive landscape is changing fast**



Inter-regional routes (isodistance lines at 9500 km)

Aviation's centre of gravity is moving...

- ... from Europe and the US to the Asia/Pacific region
- ... which will become this year the largest travel market
- If we want our airports to continue their hub function and avoid them becoming mere spokes, then we need to act now!

RANKING PER NUMBER OF PASSENGERS AT WORLD 10 LARGEST AIRPORTS IN 2012

Total passengers: arriving and departing passengers; direct transit passengers counted once

RANK	CITY	CODE	TOTAL PAX	% CHANGE	RANKING2011
1	ATLANTA GA, USA	ATL	95 462 867	3.3	1
2	BEIJING, CHINA	PEK	81 930 275	4.5	2
3	LONDON, UK	LHR	70 038 857	0.8	3
4	TOKYO, JAPAN	HND	67 787 528	8.3	5
5	CHICAGO IL, USA	ORD	67 091 391	0.3	4
6	LOS ANGELES, USA	LAX	63 689 354	2.9	6
7	PARIS, FRANCE	CDG	61 611 934	1.0	7
8	DALLAS/F.W., USA	DFW	58 591 842	1.3	8
9	JAKARTA ID, INDO	CGK	57 730 732	14.4	13
10	DUBAI, AE	DXB	57 684 550	13.1	12

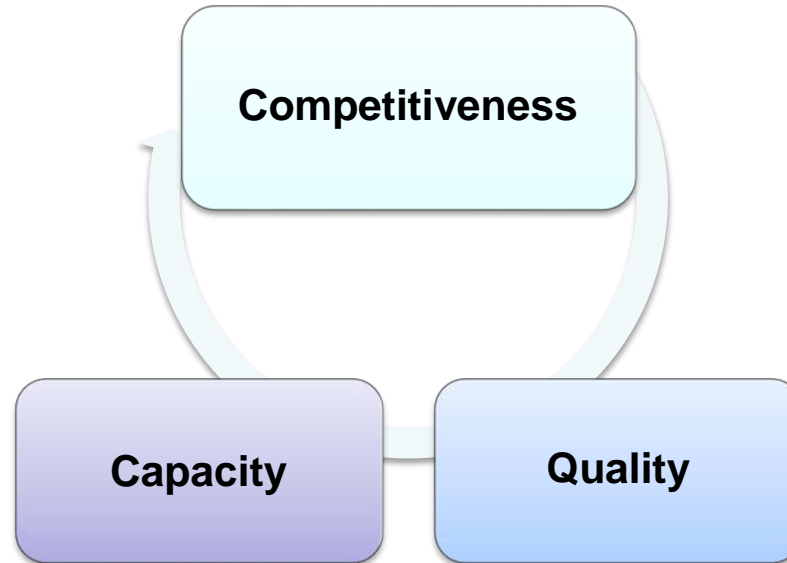
Source: ACI

RANKING PER TRAFFIC EVOLUTION OF WORLD 25 LARGEST AIRPORTS IN 2012

RANK	CITY	PASSENGERS	% CHG	REG	WORLD RANK
1	ISTANBUL TR	44 992 420	20.1	EUR	20
2	JAKARTA, ID	57 730 732	14.4	ASP	9
3	DUBAI, AEA	57 684 550	13.1	MEA	10
4	BANGKOK, TH	53 002 328	10.6	ASP	14
5	SINGAPORE, SG	51 181 804	9.9	ASP	15
6	SAN FRANCISCO, US	44 431 894	8.5	NAM	22
7	TOKYO, JP	67 787 528	8.3	ASP	4
8	SHANGHAI, CN	44 880 164	8.2	ASP	21
9	GUANGZHOU, CN	48 548 430	7.7	ASP	18
10	CHARLOTTE, US	41 226 035	5.5	NAM	24
11	HONG KONG, HK	56 064 428	5.1	ASP	12
12	BEIJING, CN	81 930275	4.5	ASP	2
13	ATLANTA GA, US	95 462 867	3.3	NAM	1
14	NEW YORK, US	49 293 587	3.1	NAM	17
15	LOS ANGELES, US	63 689 354	2.9	NAM	6
16	AMSTERDAM, NL	51 035 590	2.5	EUR	16
17	FRANKFURT, DE	57 520 001	1.9	EUR	11
18	DALLAS/FORT, US	58 591 842	1.3	NAM	8
19	PARIS, FR	61 611 934	1.0	EUR	7
20	LONDON, GB	70 38 857	0.8	EUR	3
21	DENVER, US	53 156 278	0.8	NAM	13
22	LAS VEGAS, US	41 666 527	0.4	NAM	23
23	CHICAGO, US	67 091 391	0.3	NAM	5
24	PHOENIX, US	40 452 009	-0.2	NAM	25
25	MADRID, ES	45 175 501	-9.0	EUR	19

The challenges

- Airport capacity in Europe is still an issue. **New 'Challenges of Growth 2013' study** confirms the airport capacity challenge identified by previous studies.
- By 2035, in the most-likely scenario, **nearly two million flights would not be accommodated within the reported airport plans.**
- Moreover, by 2035, **more than 20 airports would be running at, or close to capacity** (they were just three in 2012).
- **ATFCM (airport) delay would become a major contributor of delay:** from around 1 minute today up to 5-6 by 2035 while EU target is only 0.5!



- Questions unanswered: what about **intermediate level of congestion**? What about **external disturbances**? What about **other classes of delay**?
- In Challenges of Growth 2013: simulation of turn-around process to calculate reactionary delays. What about **specific turn-around process at EU larger airports**?
- Also, what about **impact of adding new demand to the network** (the two million flights 'lost')?
- So how to **accomodate demand for travel while at the same time delivering the required level of performance**?
- How to **measure performance**?

Provisions in the 'Better Airports' package to improve airport performance

- The slots proposal reinforces management of the air transport network at EU level (flight plan/airport slot consistency and beyond)
- The groundhandling proposal reinforces the role of the airport in the coordination of ground handling. Role for the PRB (providing a consolidated report based on annual reports from the airport managing bodies)
- The Noise proposal links restrictions with operational improvements from SES and SESAR as part of a 'noise mitigating strategy'

Other performance issues

- Long-term planning of capacity
- Network congestion and mitigating measures
- Definition & use of capacity
- Performance of airport operations/analysis of the delays/reporting and benchmarking (no target setting)
- How innovation and technology can help

Conclusion

- **The EU Internal market in Aviation is one of the success stories of the European Union**
- **However, confronted with internal constraints and growing competition from third countries, it needs to evolve**
- **Capacity and quality will continue to be high on the agenda of the European Commission**
- **More work is needed on airport performance especially on delays**

An aerial photograph of a large, clear blue lake surrounded by green and brown mountains. A small airplane is flying across the sky, leaving a white contrail.

Thank you for your attention!

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