European Aviation Club
Is European ATM competitive?

Brussels, 12th March 2014

Frank Brenner
Director General, EUROCONTROL
ATM - A natural monopoly?
Eyjafjallajökull
EUROCONTROL – 40 Member States
Traffic in Europe

IFR traffic in Europe
1960-2012 historical figures
2013-2035 forecast

Long-Term Trend before 2009
Long-Term Trend
Forecast Traffic
Long-Term Average Growth

Annual Growth
Actual Traffic

Traffic in Europe
Delays in a congested network (2035)

Flow regulation (ATFCM) delay jumps from 1 min/flight in 2012 to 5-6 min/flight in 2035, raising total delay (including reactionary and non-ATFCM delays) from 8 min/flight to 14 min/flight.
Horizontal route efficiency - example

- Munich -> Paris CDG (13%)
- Paris CDG -> Munich (4.7%)
- Significant impact of military areas
Free route airspace

Free Route Airspace Implementation proposed for 2019

- No FRA Implementation
- Full FRA (H24)
- Limited sector implementation Full FRA (H24)
- Full FRA (Night)
- Comprehensive DCT implementation (H24)
- Comprehensive DCT implementation (Night)
- Limited DCT implementation (Night)
- Plains to be updated
- Cross border FRA/ DCTs
Military needs
Vertical route profile
Higher cruise altitudes requested

Flight Level Distribution in ECAC

- Week 25 - June 2008
- Week 25 - June 2013

Director General EUROCONTROL – European Aviation Club – 12.03.2014
Capacity = fewer delays
Safety
Cost-efficiency
Fragmentation
Defragmentation - FABs
Route charges
Centralised Services

- Flight Plan and Airport Slot Consistency Service (FAS).
- 4D Trajectory Flight Profile Calculation for planning purposes Service (4DPP).
- European Tracker Service (ETKR).
- European ATM Information Management Service (EAIMS).
- Management of Common Network Resources Service (CNR).
- Network Infrastructure Performance monitoring and analysis Service (NIPS).
- Pan European Network Service (PENS).
- Data Communication Service (DCS).
- To be defined.
Europe in World Traffic 2010/2036

Source: ICAO/CAEP FESS/9 Forecast Inputs & Assumptions (2010-2036)
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