Directorate-General for Energy and Transport

EUROPEAN
COMMISSION

Single European Sky

Anforderungen und Entwicklungschancen für nationale Flugsicherungen

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EC Community Aviation Policy……
The point of departure

- To overcome fragmentation through a <u>Single Aviation Market</u> which guarantees full access without discrimination

- To ensure the proper functioning of the Single Market through <u>common rules and standards</u>

- To attain an <u>efficient and sustainable</u> European air transport system

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EU Single Aviation Market……Facts

- Unprecedented example of regional integration – other world regions have similar aspirations

- The Single Market has also a significant social dimension

- Tripling of air travel 1980-2000 and further doubling expected by 2020

- Emergence of low-cost carriers (1% of capacity in 1996, +28% in 2006)

- More competition between air carriers (~20% more airlines than in 1990)

- More routes with more than 2 competitors (+300% 1992-2006) and more intra-EU routes (~170% 92-06)

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EU Single Aviation Market……
Facts

● Based on a comprehensive body of common legislation implemented over past 15 years since 1992 "Third Package":

» Fares, market access (1992)
» Air passenger rights (1991 + 2004)
» CRS (1999)
» Noise (1992 + 2002)
» Safety (2002 + 2005 + 2006)
» Social issues (licences, flight times 1992 + 2007)
» Insurance (2004)
» Allocation of slots (1993 + 2004)
» Airport Ground Handling (1996)
» Airport Security (2002 + 2006 + IRs)
» Strict competition and state aid rules (EC Treaty)
» ATM - Single European Sky (2004 + IRs) – SESAR
  • **No 549/2004:** *Framework*
  • **No 550/2004:** *Service Provision*
  • **No 551/2004:** *Airspace*
  • **No 552/2004:** *Interoperability*

EU Single Aviation Market……
based on high common EU standards

The Commission has worked towards

- establishing a single aviation market,

- adopting common rules in most relevant areas of the air transport system,

- enhancing competition and efficiency throughout the whole value chain of aviation,

- developing an external dimension of the EU single aviation market,

but there remains an area where we still have to work to achieve our objective of an efficient and integrated European air transport system

European Single Aviation Market......
Single European Sky in detail (I)

SES started in 2004 with its 4 Regulations by laying down the foundations for

● **Legal and institutional framework**

» Single Sky Committee assists the Commission in adopting the enabling legislation through comitology with civ/military participation, EASA, ICAO and 3rd countries

» Industry Consultation Body enables all industry stakeholders and social partners to contribute to legislation

» Technical support from Eurocontrol in the rulemaking process through mandates

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European Single Aviation Market......
Single European Sky in detail (II)

- **Separation of service provision from regulation**

  » Each Member State has established a National Supervisory Authority (NSA) to ensure effective regulation and for avoiding conflict of interests. NSAs are also exercising a safety oversight function

  » Since 20 June 2007, air navigation service providers have become subject to certification by the NSAs (Regulation 2096/2005)

- **Transparency of charges**

  » Regulation 1794/2006 on a common charging scheme ensures full transparency in the establishment of air navigation service charges

European Single Aviation Market...... Single European Sky in detail (III)

- **Harmonisation in licensing of controllers**

  » Adoption of Directive 2006/23/CE that will achieve a harmonised level of competence and an improved mobility of workers (Important social dimension as there are i.e. 20.000 ATM controllers within the EU)

- **Advances in the efficient use of airspace**

  » Common provisions for the flexible use (civil and military) of airspace in accordance with Regulation 2150/2005

  » Harmonisation of airspace classification in the upper airspace in accordance with Regulation 730/2006

European Single Aviation Market......Single European Sky in detail (IV)

- **Towards interoperable equipment**

  » An effective interoperability mechanism has been established to adopt implementing rules (Regulations) and to develop Community specifications (Standards)

  » So far 4 implementing rules & 2 Community specifications have been adopted

  » Indispensable mechanism for the efficient implementation of SESAR

However, in spite of certain progress we urgently need to face key challenges…

- ## Environment
  - » Aviation's share of EU greenhouse gas emissions (currently 3%) is predicted to increase.
  - » Network improvements could save up to 4.8 mio tons of CO^2 per year

- ## Fragmentation
  - » Significant additional costs for airspace users (€2 bn per year could be saved by reducing fragmentation)

- ## Economics
  - » Cost efficiency efforts are not sufficient
  - » Liberalization of aviation market vs. Harmonization of ATM
  - » Current European route network is an amalgamation of national routes that makes intra-European flights 15% less efficient than domestic flights, resulting in additional costs of €1.4 bn per year

- ## Safety
  - » Cannot be compromised and must be enhanced with increased traffic levels

- ## Capacity
  - » Further increase of traffic (250% increase within the next 20 years) with enlargement and Open Skies

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Towards a more performing European Aviation System…

Following the 2007 High Level Group report we need to

➢ put the emphasis on the right governance

➢ implement a comprehensive Total System Approach

➢ focus on a pan-European perspective

➢ use of the Community method, <u>because it delivers !</u>

☑ **…have a SES 2nd Package**

Single European Sky……
The 2nd Package

- PERFORMANCE

- GOVERNANCE

- TECHNOLOGY (SESAR)

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SES Evolution with…

PERFORMANCE

  » Introduction of a performance-driven approach and framework, including independent performance review

  » Economic and performance regulation with specific targets at Community level

  » Better flight-efficiency to be achieved through improvement of the network architecture and more efficient use of routes

  » Network manager, representing all stakeholders, responsible for improving route, sector design and optimising use of the network

  » Acceleration of the creation of FABs towards dates politically committed by States (2010 commitment, 2012 implementation)

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SES Evolution due to changes in ….

GOVERNANCE

» Effective use of the Community approach to provide better regulation

» Extension of EASA competence to airports, air navigation services and air traffic management

» Reform of Eurocontrol towards better integration with the SES architecture

» Ensure appropriate involvement of all stakeholders including social dialogue and a more effective civil/military cooperation

Dealing with the 'Capacity Crunch'…

- <u>TECHNOLOGY</u>
  - » Technological improvements to be delivered by SESAR in 2013

  - » SESAR Joint Undertaking to drive technological improvements in line with the Master Plan

  - » Ensure global interoperability (SESAR / NextGen)

- <u>Airport Capacity</u>
  - » Action Plan for airport capacity, efficiency and safety in Europe

  - » Establishment of an Observatory to exchange and monitor data/information on capacity (Capacity assessment, Capacity planning, Comodality, Intermodality)

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The Commission will propose in June 08 the 2nd SES package involving the…

- Application of the Community method as driving force of aviation regulation to enhance safety, performance and capacity

- Safeguard of a sustainable Air Transport System

- Implementation of concrete measures from the EU Airport Capacity Plan

- Inclusion of the pan-European Dimension, assuring the involvement of third countries by 2010

- Full exploitation of technology developments (Development phase of SESAR)

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At the end we all need to achieve the Single European Sky by 2012 …

✓ in order to develop a global system approach, including the airport capacity issue, and to enhance safety, capacity, cost-efficiency and environmental contribution of air navigation service provision

✓ with a Community performance framework in order to tackle fragmentation, reduce flight inefficiencies and ensure a sustainable development of aviation

✓ including the pan-European dimension and the integration of societal requirements with a view to the objectives from the Lisbon agenda

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Any Questions ???

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