



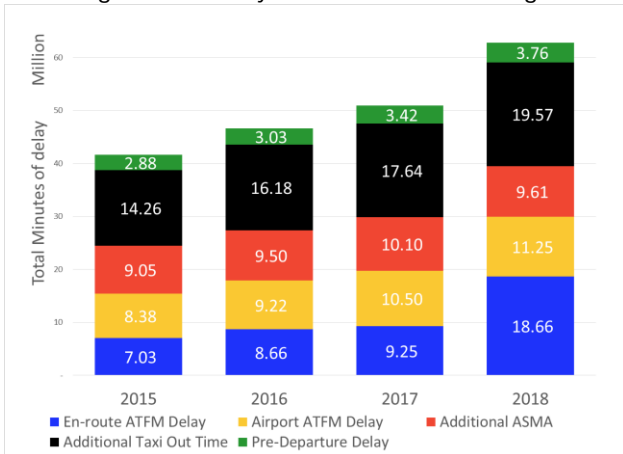
# Europe's capacity cliff

Single European Sky is failing passengers and airlines alike. A performance regulatory framework is urgently needed at the airport level.

## Delays are increasing

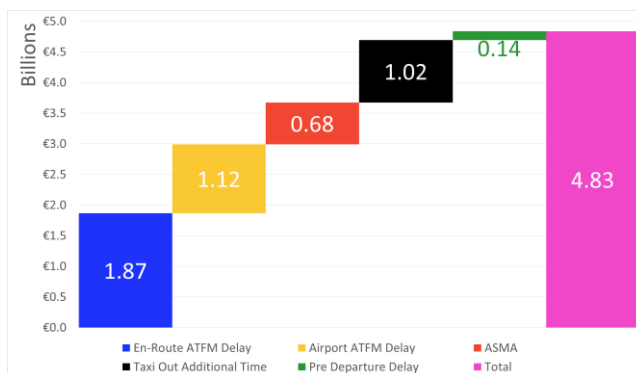
Passengers in Europe suffer more than twice the number of delays than four years ago, in 2018 European airports and airspace generated over 60 million minutes of delays and the problem has continued this year as well.

In 2018, there was a significant deterioration of en-route performance with an increase in delays of 140%, where 33% of flights were delayed 49 minutes on average.



Delays in and around airports represent 60% of those in Europe with 11.5 minutes of delay per flight in 2018.

Flight delays detract from the passenger experience, generate unnecessary carbon emissions and weaken airline sustainability. It is estimated that delays cost airlines more than €4.8 B in 2018 alone.



This dramatic situation needs urgent improvement from both a network and a gate-to-gate perspective.

## Who is not performing?

During 2018, the top five en-route delay locations generated 41.8% of the total en-route ATFM delays:

- DFS was the highest generator of en-route delays. Despite consolidating the Upper Airspace at Karlsruhe ACC, where staffing level problems persist, it has been unable to re-locate sufficient staff from Munich.
- DSNA suffered from industrial action and shortage of ATC capacity while ATCO staff shortages have plagued Marseille, Reims and Brest ACCs.
- MUAC generated significant delays because of ATC staff shortage; there has been no increase in ATCOs since 2013 and it is therefore unable to staff all sectors.
- ENAIRE experienced high delays due to a lack of ATC capacity, particularly in the Barcelona and Palma ACCs.
- FABEC was a significant contributor to delays, with Austria, Croatia, Czech Republic and Slovakia all missing national targets mainly due to weather and ATC capacity.

Capacity and staffing generated 60.4% of the delays. Despite there being more ATCOs today than 10 years ago, they are spending fewer hours actually controlling aircraft.

ANSPs tend to underspend and put off capital expenditures (CAPEX). Greece, Germany and Spain have significantly underspent. DFS has held back €126M in CAPEX. In contrast, most ANSPs are also currently generating surplus funds due to higher than expected traffic, making short-term funding available to resolve these issues.

Performance regulation for airports is needed. On the airport side, data availability is inconsistent and there is no authoritative benchmark. As a result, the SES Performance Scheme is not able to measure the situation or to drive ATC performance at the airport level. This is critical, as based on Eurocontrol data, congested airports will increase from 6 to 16 in the coming years, leading to further delays.

The airport-specific delays vary substantially, and we need to understand why. E.g. additional holding at Heathrow averages more than seven minutes per flight. Whilst this is an improvement, due to new systems such as TBS and Extended AMAN, it is still nearly twice as all other airports.

Airport delays add costs to airlines and frustration to passengers. How much longer before taking action?

[www.iata.org/airspacebenefits](http://www.iata.org/airspacebenefits)