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**COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN
PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL
COMMITTEE AND THE COMMITTEE OF THE REGIONS**

**Airport policy in the European Union - addressing capacity and quality to promote
growth, connectivity and sustainable mobility**

(Text with EEA relevance)

1. INTRODUCTION

1. Airports play a crucial role in the aviation chain, linking airlines with their passengers and freight customers. They have also become increasingly important to the European economy, providing a wide range of connections within the EU and ensuring that Europe stays connected with the rest of the world. They are also central to the successful delivery of the Single European Sky.
2. As recognised in the Declaration adopted at the Bruges Aviation Summit in October 2010¹, there is a need to reform EU rules to foster the competitiveness of European airports and eliminate capacity bottlenecks, so as to enhance the efficiency of each link of the aviation transport chain (e.g. airport operators, carriers, other service providers) and give travellers and companies more value for money.
3. This need is also recognised in the Commission's work programme for 2011 which calls for a more optimal use of the European airport network to help tap the potential of the Single Market for growth. This will in turn help prepare the EU to move towards its Europe 2020 objectives and to deliver sustainable growth through a more competitive, resource-efficient economy. In the same spirit, the White Paper — Roadmap to a Single European Transport Area², identifies the improvement of market access and the provision of quality services at airports as essential for the completion of the Single European Transport Area.
4. This paper outlines the progress made in implementing the 2007 Action Plan for airport capacity, efficiency and safety in Europe³. It also identifies two key challenges for European airports: **capacity** and **quality**. In doing so, it describes the context for the three legislative proposals that together with the communication form a coherent set of specific measures: a proposal to make better use of existing capacity by revising the current slot allocation system, a proposal on groundhandling services at EU airports and a proposal on noise-related operating restrictions.

2. THE AIRPORT CAPACITY CHALLENGE

2.1. A capacity crunch at the EU's largest airports in a fast-changing world

5. The 2007 Action Plan identified a growing gap between capacity and demand at a number of busy EU hubs. Congestion at these airports will remain a concern. Traffic will continue to grow in the future, as it has done over the past 50 years despite periods of economic downturn and other disruptions⁴. Although air traffic in Europe

¹ The Bruges Aviation Summit brought together high level figures from the European aviation community to discuss the challenges confronting the sector. It resulted in the 'Bruges Declaration'. COM(2011) 144.

² COM(2011) 144.
³ COM(2006) 819. See also Council conclusions of 2 October 2007 and the European Parliament Resolution of 11 October 2007.

⁴ The International Air Transport Association (IATA) predicts globally 16 billion passengers and 400 million tonnes of cargo in 2050 (against respectively 2.4 billion and 40 million in 2010). Airbus predicts an average annual traffic growth of 4.8% from 2010 to 2030.

will grow more slowly than in emerging economies it will nevertheless nearly double by 2030⁵.

6. However, Europe will not be in a position to meet a large part of this demand due to a shortage of airport capacity. The congestion levels predicted by the 2008 *Challenges of Growth* study were confirmed in 2010. Despite the worldwide economic crisis and a predicted 40% airport capacity increase between 2007 and 2030 (including new airports, new runways and new air- and ground-side infrastructure), some 2 million flights — 10% of predicted demand — will not be accommodated because of capacity shortfalls⁶.
7. In concrete terms, by 2030 no fewer than 19 European airports⁷ will be operating at full capacity eight hours a day, every day of the year (compared to 2007 when just 5 airports were operating at or near to capacity 10% of the time). This will have a major impact on the entire aviation network since by 2030 congestion at these airports will mean 50% of all flights affected by delays upon departure or arrival, or both (compared to 17% in 2007). Compounding the situation, the system will also be more vulnerable to disruption due to airport congestion and less able to recover from crisis situations. Delays will persist in the system for longer and will propagate more rapidly and widely. Air transport punctuality — which in 2010 was the worst recorded in Europe since 2001 despite traffic below 2007 levels⁸ — will be a major concern.
8. Data collected from large airports in an independent study undertaken for the Commission shows a similar pattern in 2025⁹. Although the downturn in global air traffic since 2008 has reduced the gap between demand and planned capacity and despite the fact that one of Europe's largest hubs, Frankfurt, has a new runway, by 2025 demand will continue to exceed capacity all day at London Heathrow, London Gatwick, Paris Orly, Milan Linate and Düsseldorf. If capacity cannot be increased above the planned 120 movements/hour, demand will also exceed capacity all day at Paris Charles de Gaulle. In addition, demand will continue to exceed capacity during part of the day at Amsterdam, Madrid, Munich, Rome Fiumicino and Vienna. These airports are among the most critical for the aviation network and are crucial nodes for the Air Traffic Management network. Problems at these airports have a significant knock-on effect, notably in cases of delays, for all feeder airports which depend on connections to these congested hubs, and for Europe's connections to other world regions.
9. This capacity challenge is being faced in a context of increased competition and a shift in the global aviation market. Over the next few years, air transport growth will be driven mainly by regions such as Asia Pacific, the Middle East and Latin

⁵ According to EUROCONTROL there will be 16.9 million flight movements in Europe in 2030, 1.8 times more than in 2009 (EUROCONTROL 'Long-Term Forecast Flight Movements 2010-2030'). Traffic in Europe will increase by 4.0% from 2010 to 2030, driven mainly by the traffic to/from Asia Pacific (Airbus 'Global Market Forecast 2011-2030').

⁶ EUROCONTROL 'Challenges of Growth 2008' and 'Long-Term Forecast Flight Movements 2010-2030'.

⁷ Of these 19 airports, 13 are located in the EU.

⁸ EUROCONTROL 'Performance Review Report 2010' by the Performance Review Commission.

⁹ Impact Assessment of Revisions to Regulation 95/93 prepared by Steer Davies Gleave, March 2011.

America. This means that while historically North America has been the largest aviation market worldwide with Europe in second place, by 2012-2013 these two regions are both expected to be overtaken by the Asia Pacific region. The year 2010 was illustrative of this trend: Beijing became the second-busiest airport by passenger volume, behind Atlanta. London Heathrow dropped to fourth, overtaken by both Beijing and Chicago O'Hare. The list of the fastest growing airports in 2010 confirms this trend, with only one EU airport among the top 25¹⁰.

10. These are the reasons why Europe needs to make the best possible use of its existing airport capacity and, where necessary, increase it to cater for the growing demand for travel. In this respect, while Member States are competent for airport infrastructure and are therefore at the forefront of the capacity challenge, the EU can contribute to a modernised European airport network by highlighting common issues and by updating current airport rules. It can also encourage investments, especially through the use of innovative financial instruments, so as to steer growth, secure cohesion within the EU and enhance its economic, societal and cultural links with the rest of the world.

2.2. Optimising the use of existing capacity and increasing airport capacity

2.2.1. Aligning capacity on the ground and in the air

11. Since 2007, the process of establishing a regulatory framework for the Single European Sky (hereinafter 'SES') has continued at a fast pace. A second package of legislation was adopted in 2009 with the objective of ensuring that a Single Sky is in place from 2012 onwards. Today, the framework is almost complete. Airports, which together with air traffic management constitute the infrastructure of civil aviation, are one of the pillars of this architecture¹¹. Indeed, they are essential to the network and if capacity on the ground is lacking, the Single Sky project as a whole will be negatively affected. In other words, increasing capacity in the air will be pointless if airport capacity does not remain aligned with ATM capacity¹².
12. Key to the SES is the Performance Scheme¹³ which represents an opportunity to improve air navigation service performance at EU level in the areas of safety, the environment, capacity/delays and cost-efficiency. 2010 saw the designation of the Performance Review Commission of EUROCONTROL as the Performance Review Body and the setting of EU-wide performance targets for the first reference period

¹⁰ ACI 'World Annual Traffic Report' for 2010.

¹¹ The High Level Conference on the Implementation of the Single European Sky, which took place in Budapest in March 2011, identified concrete and effective measures to implement the Single European Sky to be taken by the relevant stakeholders including airports. Airports are taken into account in the Commission's Regulation on network functions (Commission Regulation (EU) No 677/2011, OJ L 185, 15.7.2011, p. 1). In particular, main European airports are taken into account in the Network Operations Plan, and each airport included in the Network Operations Plan is required to cooperate with the Network Manager. .

¹² Madrid Declaration – Conclusions of the High Level Conference on the roadmap towards implementing the Single European Sky, Madrid 25-26 February 2010, point 4.

¹³ Commission Regulation (EC) No 691/2010, OJ L 201, 3.8.2010, p. 1.

2012-2014¹⁴. The ‘air side’ of an airport is part of this approach. However, airports’ role is currently limited.

13. From 2012 to 2014 only *en route* air navigation services will be subject to performance targets while the performance of *terminal* air navigation services (i.e. at and around airports) will be monitored as from 2012¹⁵. Besides, air navigation service capacity is not the only constraint. Data collected by the Central Office for Delay Analysis in Europe indicates that 70% of all delays are due to turn-around processes: primary delays caused by airlines or their groundhandlers (technical, boarding, etc.), airports (equipment, etc.) or other parties involved in the turn around process.
14. In the light of these findings, the Commission considers that the logic of the performance scheme should be extended to airports as a whole in accordance with a true gate-to-gate approach and with the objective of optimising and integrating all phases of a flight, from airport to airport. Therefore, while performance of *terminal* air navigation services should be subject to performance targets as from 2015 (start of the second reference period 2015-2019), performance should not stop at the control tower. It should be enhanced on ground level as well and include all ground operators (airlines, airport managing bodies, groundhandlers, security and customs services). The proposals to revise current rules for the allocation of airport slots and access to groundhandling services, which the Commission is tabling together with this communication, should contribute to this objective.
15. Airports also participate in the technological dimension of the SES, the SESAR programme. SESAR has the potential to expand capacity at airports, thus accommodating additional demand, reducing the number of delayed flights or cancellations and raising activity and mobility levels. Airport-related activities currently constitute some 30% of overall SESAR activities¹⁶. Delivering these capacity gains will require adequate, timely and properly synchronised investments in SESAR-compliant equipment.
16. Airports are among the most complex interdependent operational environments and Airport Collaborative Decision Making (A-CDM) constitutes an excellent solution for improving the overall efficiency at an airport by acting on shared information, with no major capital expenditure¹⁷. It is also a key enabler for many technological

¹⁴ Commission Decision 2011/121/EU, OJ L 48, 23.2.2011, p. 16. Improvements should be as follows: for the environment a 0.75% of the average horizontal en route flight efficiency indicator in 2014; for capacity an average delay of 0.5 min per flight in 2014, for cost-efficiency an improvement of 10% over the period.

¹⁵ In addition, airport operators with more than 150 000 commercial movements/year and all coordinated and facilitated airports with more than 50 000 commercial movements/year already provide the data required under the SES Performance Scheme Regulation.

¹⁶ Projects mainly relate to subjects such as reducing runway occupancy time, aircraft separations (including wake vortex), surface guidance systems addressing both airport and ‘on-board’ systems and runway safety (in particular the development of integrated systems embracing ATC, aircraft and vehicles).

¹⁷ At CDM airports ‘business non-sensitive’ information is available to all partners: EUROCONTROL Central Flow Management Unit, ATCO, airport operator, aircraft operator, pilot and ground handler. A-CDM is a proven tool that can assist airports in particular by improving the overall efficiency of aircraft turn-around and pre-departure sequencing process. It has the potential to decrease knock-on delays at

advances being developed by SESAR. Accordingly, the Commission considers that its implementation at the EU's large airports should be speeded up building on the A-CDM Action Plan initiated by EUROCONTROL¹⁸. Over time, due consideration should be given to extending A-CDM to all actors on the ground to ensure that passengers, baggage, air cargo and aircrafts are handled 'seamlessly'.

2.2.2. *Making better use of existing capacity at congested airports by ensuring a more resource-efficient slot allocation system*

17. The analysis of how the current Slot Regulation is working has shown that the allocation system in place prevents optimal use of the scarce capacity at busy airports¹⁹. Given the predicted shortage of capacity at some critical airports and its spill-over effect on overall network performance, and taking into account the limited development of new airport infrastructure in the EU, this is something Europe can not afford.
18. Therefore the Commission is proposing changes to the current Regulation to allow for the introduction of market-based mechanisms across the EU provided that safeguards to ensure transparency or undistorted competition are established, including greater independence for slot coordinators. This will help to ensure that slots go to those carriers able to make the best use of them. Several additional measures will improve slot utilisation while ensuring a correct use of this scarce resource.
19. It has been estimated that by revising the current allocation system up to 24 million additional passengers would be accommodated each year at European airports meaning more than €5 billion in economic benefits and up to 62,000 jobs by 2025 thanks to a more resource efficient allocation system²⁰.

2.2.3. *Balancing the desired level of noise protection with transport and mobility needs*

20. Although aircrafts have become 75% less noisy over the last 30 years²¹, a large portion of EU citizens is still exposed to high noise levels leading to substantial negative health effects. In order to ensure the sustainability of aviation, measures targeting the noise impact will remain necessary at a number of important airports. This said, noise-related measures constrain not only airport capacity at a particular airport but also the aviation system as a whole through knock-on effects. Accordingly, decisions on noise measures and the desired level of noise protection must ensure a proper balance with capacity implications overall.

network level and improve recovery from weather or other disturbing occurrences leading to airport capacity wastage.

¹⁸ See the ACI-EUROPE/EUROCONTROL/CANSO joint Action Plan for the implementation of A-CDM at European airports.

¹⁹ Commission's Impact Assessment accompanying the proposal for a Regulation on common rules for the allocation of slots at EU airports (recast).

²⁰ Idem.

²¹ The EU is at the forefront of the development of cleaner and quieter aircrafts. Clean Sky in particular is one of the EU's largest research initiatives with a budget estimated at €1.6 billion over 7 seven years. This public and private partnership will speed up technological breakthrough to be introduced in the aircraft fleet of the future.

21. The Commission is therefore proposing changes to current rules on noise-related operating restrictions to put authorities in a better position to phase out the noisiest aircraft from airports. It will also strengthen the noise assessment process in line with the principles of the ICAO Balanced Approach on noise management so as to find the optimal combination of the most cost-effective measures for balancing transport and mobility needs with noise protection levels. Finally, it will make it possible for the Commission to scrutinise the noise assessment process and, if so necessary, suspend the decision on a noise-related operating restriction, prior to implementation .
- 2.2.4. *Encouraging public and private investments for funding airport infrastructure at EU level*
22. Optimising the use of existing facilities will clearly not be enough. Airports need to continually upgrade and develop their facilities for a wide range of reasons from using more energy-efficient and ecological appliances to safety and security measures and are also related to the demands of the market. The most expensive investments generally relate to capacity expansion and European airports predict that while they have committed a total of € 120 billion to new facilities between 2000 and 2015, this will be far from enough²².
23. The recently adopted proposal for new TEN-T guidelines²³ introduces a two layer network: a comprehensive network and a core one. The comprehensive network will ensure accessibility at a regional level and to the core network. The latter will consist of the strategically most important parts of the comprehensive network based on the concept of multimodal nodes (mainly — but not exclusively — cities and large conurbations). It should be accomplished by 2030 at the latest and become the backbone of a European integrated transport system.
24. More than 340 airports will constitute the TEN-T airport network and at least 82 of them will be part of the core network²⁴. Eligible airport projects for financing will concern the connection of airports to rail, the optimisation of the existing infrastructure, increases in airport capacity and support for the implementation of the Single European Sky, in particular the deployment of SESAR. Structural and Cohesion funds are a key element of EU transport infrastructure policy and they will be coordinated with the TEN-T priorities while respecting State aid rules.
25. In the framework of the TEN-T, the following financial instruments will contribute to the development of airports: the new integrated instrument "Connecting Europe Facility" (CEF)²⁵ will support air-rail link projects for core network airports as well as SESAR and the Single European Sky; grants for airports in the comprehensive network will be managed through the Cohesion Fund and the European Regional Development Fund (ERDF). Besides, to assist with the financing of the CEF, the

²² ACI-EUROPE 'An outlook for Europe's airports' 2010.

²³ COM(2011)665.

²⁴ The threshold for funding works will double from 10% to 20% of the total cost while studies will continue to be supported up to 50% of the total cost.

²⁵ In the period 2014-2020 the facility will allocate € 31.7 billion to transport, out of which €10 billion dedicated to transport infrastructure investments in the Member States eligible under the Cohesion Fund.

Commission has also adopted the terms for the Europe 2020 Project Bond Initiative which will be one of a number of risk-sharing instruments upon which the facility may draw in order to attract private finance in priority projects in all transport sectors.

26. In addition, airport projects can benefit from other EU-funded financial engineering instruments. Airport projects can benefit from the "Loan Guarantee for TEN-T projects" (LGTT) which is a product specifically designed and administered by the European Investment Bank for the TEN-T. Another product called the Marguerite Fund is a pan-European equity fund which aims to act as a catalyst for infrastructure investments implementing key EU policies including in the airport sector. Overall, EU support will facilitate access to the capital market.
27. Moreover, given the competitive nature of the aviation market, attention must be paid to the risk that public funding of airport infrastructure might distort competition. The Community Guidelines on the financing of airports and start-up aid to airlines departing from regional airports, which were adopted in 1994 and 2005, are currently being reviewed²⁶. In this respect, the consistency of public financing of airports with State aid rules should be considered. Whilst certain categories of aid may be justified, such aid should not lead to undue distortions of competition.

3. THE AIRPORT QUALITY CHALLENGE

28. Airports are a key interface between passengers and airlines, and the quality of service provided at airports is a key determinant of the passenger and airlines experience. For passengers, the most-valued aspects of their experience of the airport are likely to include ease of access to the airport, getting reliable information quickly, simple processes for checking-in and for baggage, short waiting times and having staff on hand to offer advice if something unexpected happens. For larger airports it is a question of delivering a passenger-friendly experience whilst at the same time processing thousands of passengers per day in a congested infrastructure environment.
29. As far as their relationship with their airline clients is concerned, the significant changes in the air transport sector over the past 15 years thanks to the European aviation market and a number of air services agreements with key global partners, have resulted in airports evolving from mere infrastructure providers to fully fledged and diversified business models serving a variety of market needs. Freight carriers in particular have specific needs for logistics infrastructure to support their operations based upon 'just-in-time' deliveries of critical items to businesses around the world.
30. Regulatory intervention in this field should, of course, help to improve the quality of service provided at airports while also ensuring that airports remain the thriving and competitive environments they are today. In addition, passengers in Europe now take for granted a high level of aviation safety and security and core standards in this respect are paramount.

²⁶ The Commission launched a public consultation of stakeholders which ran from April to June 2011 as a first step in the review process. The replies were published on 18 October 2011 and are available on the Europa website.

3.1. Promoting airport accessibility and efficiency through rail links

31. A key requirement for an efficient airport is to be easily accessible. While small sized airports can rationalise airport access through a well organised network of bus services, rail is an additional, sustainable option for airports of a certain size or which already have rail tracks in the vicinity of the terminal. There are basically three kinds of rail links to airports. The so-called ‘Airport Express’ services provide a safe and direct connection between the city centre and the airport, avoiding traffic jams, freeing up access roads and reducing CO₂ emissions. Medium-sized airports may also operate regional train services. These widen the catchment area (so fewer airports are needed to serve a given area). Large airports with a significant number of long-haul flights can successfully link to high-speed rail lines which act as feeder services and may replace some costly short-haul flights, thus freeing valuable slots that can be used in markets currently not served. This kind of service obviously benefits passengers but when properly implemented it is also a win-win solution for all industry stakeholders: air carriers, train operators and airports.
32. The trend in air-rail intermodality development is clearly positive as more and more agreements between air and rail carriers are signed and passengers get used to these services. It has been estimated that in 2011 about 23 million passengers will have accessed EU airports by rail systems from beyond their metropolitan area. However, many obstacles remain, from IT fragmentation inside the rail mode, to issues concerning legal and operational responsibilities, schedule coordination, common ticketing, revenue allocation, etc.
33. The Commission will continue to promote the development of air-rail services from various perspectives, ranging from financial support for intermodal infrastructures (main EU airports to be linked to the TEN-T rail and road network by 2050), to working groups aimed at bringing all stakeholders together at one table, and to the development of interoperable standards for information and ticketing through the TAP-TSI²⁷ rules being developed by the European Rail Agency.

3.2. Improving groundhandling services

34. Even though groundhandling services are not always visible, the passenger experience both in airports and in the air relies on quality groundhandling services. Whether it concerns the proper reception of passengers at the airport, correct preparation of the aircraft (for example, cleaning the cabin) or vital functions for the safe operation of a flight (for example, de-icing the aircraft), comfortable, reliable, safe and value-for-money flights cannot be operated without them.
35. The original 1996 Directive on groundhandling focused primarily on opening access to the groundhandling market and led to increasingly dynamic groundhandling markets. However, the degree of competition in restricted services and the access regime still vary significantly across Member States. In addition, what currently requires attention is ensuring that all parts of the aviation chain perform adequately for the benefit of the aviation system as a whole (the ‘gate-to-gate’ approach to aviation).

²⁷ Technical Specifications for Interoperability for Telematic Applications for Passenger.

36. The 1996 legal framework is no longer sufficient. Groundhandling services are not efficient enough due to barriers to entry and expansion. Moreover, the overall quality of groundhandling services has not kept up with evolving needs in terms of reliability, resilience, safety, security and environmental performance. As a consequence, the benefits of liberalisation are not sufficiently exploited and passed on fully to end users (i.e. businesses and citizens).
37. Although further steps are needed to ensure equal access to the market, the provision of quality services also depends upon other factors. In a labour-intensive sector such as groundhandling, there are important social issues to be considered. The system of tenders affects staff working conditions and encourages turnover of staff. However, the legal framework in the groundhandling sector does not allow at present to take mitigating measures as regards the transfer of staff from a previous groundhandling operator to a new one, beyond the safeguards already provided in Council Directive 2001/23/EC²⁸. Continuous staff development and training have a strong impact on service quality but the current legal framework does not address the question of training of personnel. Moreover, the current difficult economic situation results in cost-saving practices which may translate into reduced investment in people leading to poorly-trained staff. The use of poorly-trained staff in turn increases the risk of low-quality services and downgrades the safety and security of groundhandling services.
38. Important events leading to critical flight disruptions such as the volcanic ash crisis and heavy snowfalls paralysing key hub airports have shown the need for increased coordination of ground operations for European airports and the network as a whole (dealing with the knock-on effects) and effectively assisting stranded passengers. At large airports, which are particularly important for the network, the airport managing body should ensure that the ground operations are coordinated notably through contingency plans and minimum quality standards. Besides, in order for passengers to be able to exercise their rights, experience has shown that the carrier needs to be present or represented at the airport. This is not always the case and, as a result, airports have been faced with difficult situations. The Commission will consider this in the context of a revision of Regulation 261/2004²⁹, which will also provide an opportunity to consider whether the financial burden of providing care and assistance should be borne by the air carrier alone when other parties are responsible for the delay or cancellation.
- 3.3. Airport charges: enhancing the transparency and cost-relatedness of airport and security charges for airlines and passengers**
39. Fair access to airport infrastructure at a fair price to airlines makes an important contribution to an efficient overall aviation system. An important step was taken in the European Union in 2009 with the adoption of the Airport Charges Directive on

²⁸ Council Directive 2001/23/EC of 12 March 2001 on the approximation of the laws of the Member States relating to the safeguarding of employees' rights in the event of transfers of undertakings, businesses or parts of undertakings or businesses (OJ L 82, 22.3.2001).

²⁹ Regulation (EC) No 261/2004 of the European Parliament and of the Council of 11 February 2004 establishing common rules on compensation and assistance to passengers in the event of denied boarding and of cancellation or long delay of flights, and repealing Regulation (EEC) No 295/91 (OJ L 46, 17.2.2004).

common minimum standards for the setting of charges levied on airlines for the usage of the necessary aeronautical infrastructure for operating flights.

40. Two objectives remain. One is implementation of the 2009 Directive, due to be transposed by the Member States by 15 March 2011. The Commission has started scrutinising the national measures taken and will report to the Council and European Parliament in 2013.
41. The second objective relates to security charges. Since 2002, EU law has imposed stricter security requirements on Member States and airports. At present, the recovery of aviation security costs is regulated at national level. However, information to passengers on these costs can be inadequate and airlines are not systematically consulted at all EU airports. Information and consultation are essential to guarantee that prices paid by passengers and citizens are established in a transparent and fair manner. In addition, this situation hinders the existence of a true level playing field for airports and air carriers. Non-discriminatory and strictly cost related security charges are thus essential to ensure fair and undistorted competition between airlines and between airports. A proposal on security charges, based on the approach chosen for the Airport Charges Directive, was made in 2009 with a view to ensuring that security charges are cost-related.

3.4. Reviewing current security checks at European airports and developing an agenda for the future

42. The current EU legal framework on aviation security³⁰ provides the EU with a robust security system. But security checks are often perceived as burdensome by passengers, aviation industry and airports. A balance is needed between enhancing security and facilitating travel.
43. With this in mind, the current ban on liquids and gels in hand luggage is to be lifted by April 2013: passengers will be allowed to take liquids onboard aircraft provided that they are screened at EU airports³¹. More recently, security scanners which do not use ionising radiations have been allowed in accordance with minimum conditions, as a method for the screening of passengers³². The scanner technology is developing rapidly and has the potential to facilitate security operations for both passengers and airports - for example by reducing hand searches.
44. The Commission is carrying out a broader reflection on how to improve aviation security in the longer term for the benefit of passengers and other stakeholders. Overall, a more 'risk based' approach to establish EU mitigating measures is a concept which may be further developed in order to target security controls where, based on intelligence information, the risk is greatest. A future security system should be a quality system that ensures a high level of security and keeps passenger trust and acceptance.

³⁰ Notably Regulation (EC) No 300/2008 of the European Parliament and the Council of 11 March 2008 establishing common rules in the field of civil aviation security and repealing Regulation (EC) No 2320/2002 of 16 December 2002 and its implementing acts.

³¹ Commission Regulation (EU) No 720/2011 of 22 July 2011, OJ L 193, 23.7.2011, p. 19-21.

³² Commission Regulation (EU) No 1141/2011 of 10 November 2011 and Commission Implementing Regulation (EU) No 1147/2011 of 11 November 2011.

3.5. Enhancing the safety of airport operations

45. As highlighted in the 2007 Action Plan, intensive aerodrome use and higher traffic volumes require improved safety levels.
46. The EU has decisively acted in this field by adopting in 2009 Regulation 1108/2009³³ extending the rule-making, standardisation and safety-analysis activities of the European Safety Agency (EASA) to aerodrome safety. This means that airports will soon be subject to common safety requirements. Work is underway on the detailed safety rules for aerodromes, drafts of which will be published by EASA before the end of 2012 prior to final adoption by the Commission. Better coordination of airport operations will also make a useful contribution to improving safety.

4. THE COMMUNITY OBSERVATORY ON AIRPORT CAPACITY: TIME TO MOVE UP A GEAR

47. As a first step towards implementing the 2007 Action Plan, the Commission set up in 2008 a Community Observatory on airport capacity as a consultative forum to improve awareness and the exchange of data and to advise on the implementation of the Action Plan. Priority was given to issues such as developing an airport capacity assessment methodology, an inventory of European airport infrastructure, airports in the gate-to-gate approach and air-rail intermodality. At the same time, a number of actions were taken within other policy frameworks. The annex to this communication provides an overview of the progress made so far in relation to the five key actions which were identified in the Action Plan.
48. In the coming months, the Commission will review the mandate of the Observatory to cover the quality and performance issues as well. In addition, as it intends to monitor the evolution of airport capacity at EU level more closely, the Commission will task the Observatory with undertaking by the end of 2012 an update of the 2008 *Challenge of Growth* study using the technical capacity and expertise of EUROCONTROL. This update should also contribute to the fulfilment of the operational and strategic role of the newly-established Network Manager. Based on the results, the Commission could ask Member States to develop and provide national strategies on airport capacity, taking into account all network implications and in particular the need to ensure the success of the SES.

5. CONCLUSION

49. Today, the European aviation sector is one of the best performing and dynamic parts of the European economy and European airports play a central role in the aviation chain. With almost 800 million passengers travelling each year by air from and to the EU (a third of the world market, almost three times more than when air traffic was liberalised in the early nineties), the European aviation sector is a world leading industry.

³³ Regulation (EC) No 1108/2009, OJ L 309, 24.11.2009, p. 51.

50. It is therefore of the utmost importance to update this model, where necessary, and ensure its continued success. Airlines, airports, air traffic management, groundhandling and other transport services are inseparably interconnected and need to cooperate in the most optimised manner to continue to perform in terms of mobility, quality and resilience. Airports themselves are heavily interdependent from an operational point of view and should not be viewed in isolation but rather as part of a European airport network. A modernised European airport network is essential to the EU's strategy for growth and to ensure connectivity within the EU and beyond as well as for sustainable mobility. The Commission accordingly proposes to:
- Revise Regulation 95/93 on common rules for slot allocation at EU airports;
 - Repeal Directive 96/67/EC and replace it by a Regulation on groundhandling services at EU airports;
 - Repeal Directive 2002/30/EC and replace it by a Regulation on noise-related operating restrictions at EU airports within a Balanced Approach.

ANNEX ON THE IMPLEMENTATION OF THE ACTION PLAN

2007 ACTION PLAN	TIMELINE	ACTION
Setting up of an Observatory		Setting up of a Community Observatory on airport capacity in November 2008.
1) MAKING BETTER USE OF EXISTING AIRPORT CAPACITY		
Mandate to EUROCONTROL to develop harmonised airport capacity and assessment methodology tools.	Early 2007	Working Group 1 'Capacity' produced a check-list of 'functional requirements' that can be taken into account for any capacity assessment methodology.
EU-wide capacity assessment inventory to improve awareness and information on regional capacity needs.	2007	Working Group 1 'Capacity' developed a draft questionnaire to inventory airport capacity, which was then validated against a sample of airports. Responses were received from 24 Member States covering 62 airports.
Consistency between airport slots and flight plans.	2007 – 2008	Commission Regulation 255/2010 on ATFM.
Potential impact of the 2007 implementation of the Single European Sky report on airport operations.	From mid 2007 onwards	Working Group 2 'gate-to-gate approach' contributed to the Commission's proposal for a Regulation on common rules for the allocation of slots at Community airports (recast of Regulation 95/93).
Mandate to EUROCONTROL to develop implementing rules on the introduction of Airport-CDM at European airports.	2008	ACI-EUROPE/ EUROCONTROL/CANSO joint A-CDM Action Plan: fully implemented at 4 airports, ongoing at a further 25 airports.
2) A CONSISTENT APPROACH TO AIR SAFETY OPERATIONS		
Extension of EASA competence to airport operations.	Early 2008	Regulation 1108/2009 extending the rule-making, standardisation and safety-analysis activities of EASA to the area of aerodrome safety was adopted. Work on its implementation started in 2010. EASA is currently drafting and consulting upon the safety rules for aerodromes.
Certification of the EGNOS/Galileo signal in space and inclusion of GNSS exploitation in the European Radio-Navigation Plan.	From 2008	The EGNOS Service Provider (ESSP) was certified by the French NSA as an Air Navigation Service Provider (under the SES regulations) in July 2010. From 2012 onwards, EASA will take over ESSP's safety oversight. EGNOS Safety of Life (SoL) service has been available since January 2011 and several EGNOS based landing procedures have already been published in France.
Comprehensive inclusion of GNSS in ATM operational processes is expected from SESAR.	2007	EGNOS is referenced in the European ATM Master Plan as a technological enabler to SESAR supporting Operational Improvements (OIs) in relation to enhanced navigation and landing capabilities.

3) PROMOTE CO-MODALITY OF TRANSPORT MODES		
Promotion and funding of inter-modal infrastructures from the TEN-T, European Cohesion Policy's programmes.	From 2007 onwards	Working Group 3 on 'Air-rail intermodality' is drafting a series of recommendations based on practical experience and best practices.
Integrated air-rail ticketing.	Early 2007	A public consultation on integrated air-rail ticketing was launched between 4 July and 30 September 2008. Work on ticketing is carried out by ERA through the TAP-TSI initiative.
4) NEW INFRASTRUCTURE NEEDS CAREFUL CONSIDERATION		
Implementation of the Noise Directive	2007 – 2008	On 15 February 2008 the Commission adopted a report on the implementation of Directive 2002/30/EC.
5) DEVELOP AND IMPLEMENT NEW TECHNOLOGIES		
Early implementation of mature technologies such as A-SMGCS surveillance and control functions.	From 2007 onwards	See above on A-CDM.
SESAR tools and systems that will significantly increase airport capacity.	2007 – 2013	Airport-related activities currently constitute some 30% of SESAR overall activities with over 50 projects rolled out within the two airport-specific work packages.