

Brexit and capacity constraints worry ACI Europe

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Olivier Jankovec, ACI Europe Director General, comments on major issues confronting European airports. Kevin Rozario reports

While there is still no clarity on a Brexit aviation deal, European airports face ever-tighter capacity pressure before the UK leaves the European Union on 29 March 2019.

The 'Challenges of Growth' report from Eurocontrol suggests that the European aviation network will be saturated by 2040, with demand for 1.5 million more flights above capacity, or 160 million passengers unable to fly.

"Eurocontrol has been sounding the alarm on airport capacity for a while," said ACI Europe Director General Olivier Jankovec, "and we are deeply concerned their warnings are not being heeded."



Airports in Europe face the twin challenges of capacity saturation and probable disruption from Brexit in March 2019. (Getty Images)

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The Eurocontrol study comes at a time when traffic growth in Europe is surpassing all expectations. "Europe's airports have welcomed more than 500 million additional passengers since 2012 – this is phenomenal growth, especially for a mature market," Jankovec told *Jane's*. "But more of our members are feeling the pressure of stretched operating peaks."

Eurocontrol predicts a 53% increase in flights to 16.2 million a year by 2040. Its forecast is based on modest annual growth of 1.9%. "Even with the additional airport capacity currently planned ... at least 16 airports will be highly congested, operating with regular delays. That is up from six today," noted Jankovec.

Unmet demand creates severe financial consequences, with a potential EUR88.1 billion (USD102.9 billion) loss of economic activity by 2040. In this landscape, it is unclear what the ACI Europe strategy would be to ensure there is the political will to increase runway capacity in the face of increasing resistance from environmentalists, and whether changing slot rules would offer a partial answer.

“Capacity and slots are undeniably linked,” Jankovec explained. “A capacity-constrained airport will always be advantageous to incumbent airlines who hold slots – giving them significant market and pricing power, but also financial opportunity if they wish to sell their slots. There is no benefit to the airport or the passenger whatsoever.

“We’re calling for reform of the current slot regulation because it’s outdated, too airline-centric and doesn’t give us a say in how our infrastructure is being used. But reforming slots is not the panacea to the capacity problem. Slot allocation is about managing congestion – not solving it.”

Efficiency can be gained in places through better slot rules, technology, and improved operational processes, but ultimately the network needs more physical capacity. “This of course means getting the licence to grow, which is a complex and increasingly highly politicised issue,” said Jankovec.

Noise and the environment are two crucial issues in the public eye. ACI Europe has pushed hard for environmental management and noise strategy, as well as addressing wider climate change impacts through its Airport Carbon Accreditation scheme, which is now a global standard for airports.

“More than 130 airports in Europe are now certified, with 33 of them having reached the [highest] carbon neutrality level,” noted Jankovec. “We are on our way to deliver on our commitment to have 100 carbon-neutral airports in Europe by 2030.” Beyond the environment, ACI Europe is also looking at developing a comprehensive sustainability strategy by June 2019, which should help ease the path to capacity expansion.

However, the European airport community is hard-pressed to add new infrastructure, as shown by the third runway project at Vienna (mired in a seemingly endless round of legal appeals) and sluggish progress towards a third runway at Heathrow.

“The time it takes to get approvals for new runways and airports has become longer, but Heathrow is without a doubt the most extreme example,” Jankovec remarked. “Airport expansion has been debated in various forms in the UK for 40 years as successive governments kicked the issue into the long grass. At the opposite end of the spectrum you have IGA’s Istanbul New Airport, which will open towards the end of the year [29 October]. That project was first put out to tender in 2013.”

Airports also need to address terminal capacity issues and ACI Europe’s Facilitation Committee is working on developing new operational concepts to leverage technology – notably digital solutions and artificial intelligence.

[Continued in full version...]

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