World ATM Congress

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Madrid

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EU GDP Growth

2012

2017 (forecast)

Source: European Commission, Autumn Economic Forecast, November 2016
The EU is taking action

Positive results in the European Union:

- **Economic growth:** all EU economies are growing. EU GDP higher than before the crisis.
- **More disposable income:** +2% in 2016.
- **More jobs:** 8 million new jobs since 2013.
- **More investments:** +2.0% in 2016.
- **Less unemployment:** lowest levels since 2009.
A Challenging Political Climate

- Greece.
- Terror Threats.
- Migration crisis.
- Global repositioning of power.
- Climate change.
Transport delivers

- **Connectivity:**
  - Mobility and prosperity.
  - Open an inclusive markets.
  - Global partnerships.

- **Efficiency:**
  - Lower costs for EU companies.
  - Europe is better able to compete globally.
  - New technologies.

**GROWTH AND JOBS**
Importance of Aviation

- 10% increase in air connectivity = 1% increase in GDP.

- EU aviation sector = 2 million direct jobs adding €510bn to EU GDP; €7.5bn of this is from ATM.

- ATM = 56,300 employees (17,370 controllers & 38,930 others).
HOW TO LEAD?
A Transport Union for global leadership

Principles and Drivers
- Decarbonisation
- Digitalisation
- Globalisation
- People-focused solutions

Implementation Tools
- Investment plan for Europe
- TEN-T / Connecting Europe Facility
- H2020

Platforms

Single transport area for global leadership
How to lead?

1. Digitalisation
   - Operations (ATM).
   - New business models (block chains, platforms).
   - Emerging technologies (artificial intelligence, big data).

2. Decarbonisation
   - Moving from Airspace to Trajectory Management.
   - End to End Traffic Synchronisation.
   - Efficient and Green Terminal Airspace Operations.
   - Electrification of operators (docking).
How to lead?

3. People (consumers and workers)
   - Passenger Rights.
   - Social dialogue.
   - Equal opportunities.
   - Quality of life (noise, pollution).

4. Global leadership
   - Continue to be global leaders.
   - Export SESAR concepts and technologies:
     - EU standard - international standard.
     - EU competitive advantage.
     - Better interoperability (harmonisation).
How to lead?

• 4. Investment

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How to lead?

5. Innovation

- Technological innovation - greater cost and flight efficiency.

- Technology enables all of these mechanisms and allows us to leverage investments to modernise ATM.

- 1st work programme of SESAR JU = 63 solutions that will:
  - Increase airspace capacity by 33%.
  - Reduce aircraft fuel burn by 2.3%.
  - 30% less delays and
  - 11% more airport capacity.

- By end of 2017: EUR 2.8 billion in investments to modernise Europe's ATM infrastructure + over 300 projects = jobs for thousands of citizens.
Delivering on the Aviation Strategy

- **Compete and be competitive**

- **Challenges:**
  - New competitors.
  - Regulatory environment must be improved.
  - Safety and environmental concerns.
Aviation Strategy is delivering

- Deliverables:
  - **Connectivity**: Tapping into growing markets (aviation agreements – ASEAN, Qatar, Turkey).
  - **Efficiency**: Tackling limits to growth on the ground and in the sky (SES, SESAR, Connectivity Package).
  - **Standards**: (Safety – EASA Regulation; Environment – ICAO deal).
Delivering on the Aviation Strategy

New Connectivity Package – spring 2017:

1. **Maintain the EU as a leader in international aviation**, by safeguarding connectivity and competition, and facilitating foreign investment into EU airlines.

2. **Tackle limits to growth in European skies**, by addressing connectivity gaps. Enhancing airspace efficiency through recommended practices for ATM Service Continuity in the event of traffic disruptions.
Conclusion

• **Growth of aviation** – EU must collaborate with international partners.

• **Our focus:** Digitalisation, People, Decarbonisation, Global leadership - driven by Innovation and Investment.

• **Europe must adapt to remain a leader in aviation** – open and connected is key.
Thank you for your attention

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