



EUROCONTROL

Medium-Term Forecast Update

Flight Movements
2009 – 2015



EXECUTIVE SUMMARY

This report presents an update of the EUROCONTROL Medium-Term Forecast of flights published in February 2009 (MTF09). The forecast considers the development of air traffic in Europe over the next 7 years.

The forecast update (MTF09b) is that there will be 11.6 million IFR movements in the EUROCONTROL Statistical Reference Area (ESRA) in 2015, 15% more than in 2008. By 2015, the high-growth scenario has an extra 1.2 million flights compared to the base-scenario (+10%); the low-growth scenario has 1.1 million fewer movements (-11%). This forecast shows volumes of traffic that are still around four years behind those forecast in 2008, i.e. it reaches the same traffic volumes up to four years later.

The main influences on this forecast are: traffic growth in 2009, which has been running about 1 percentage point below the central forecast; the economic situation, in which some States are emerging from recession with continuing questions about short-term growth prospects; and the weak state of the airline industry, with some carriers planning further cuts in the coming Winter timetable.

As a result, updating the forecast with latest economic data and traffic trends has reduced uncertainty about 2009 (which was identified as a risk in MTF09), although to some extent that uncertainty has shifted to the 2010 growth. Compared to MTF09:

- MTF09b is a downward revision (-1.4 percentage points), with traffic forecast to decline by 6% in 2009 in the base case.
- MTF09b presents an upward revision to 2010 growth (+0.5 percentage point) with traffic forecast to increase by 2% in 2010 in the base case.
- Overall, slower-than-expected growth in 2009 shifts the 2015 base forecast down by only 0.7 percentage points compared to the February forecast.

Details of growth per State are provided in annexes and summarised below in Figure 1 and Figure 2.

Figure 1. Average annual growth (AAGR) 2009-2015 for each State.

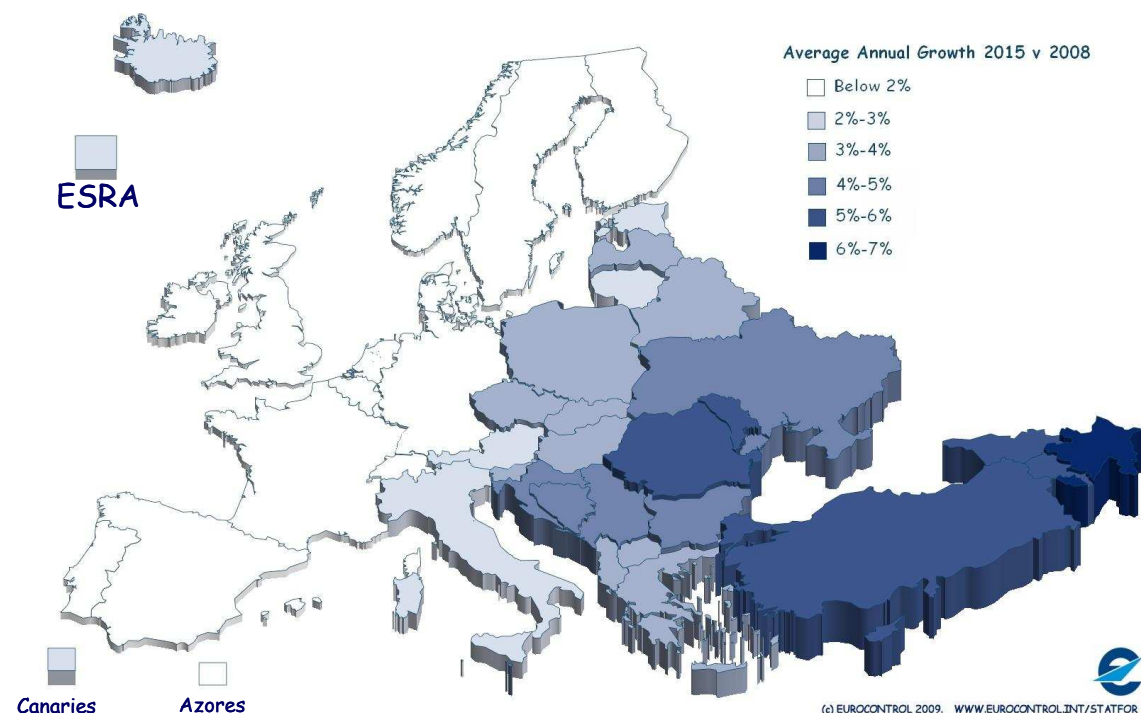


Figure 2. Summary of the forecast for the ESRA08¹.

		2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	AAGR 2015/ 2008
IFR Flight Movements (Thousands)	H	.	.	.	.	.	9,564	10,085	10,613	11,195	11,679	12,219	12,783	3.4%
	B	8,876	9,218	9,561	10,043	10,083	9,446	9,634	9,979	10,454	10,837	11,219	11,596	2.0%
	L	.	.	.	.	.	9,303	9,094	9,282	9,620	9,883	10,168	10,438	0.5%
Annual Growth (Compared to previous year)	H	.	.	.	.	.	-5.1%	5.4%	5.2%	5.5%	4.3%	4.6%	4.6%	3.4%
	B	.	3.9%	3.7%	5.0%	0.4%	-6.3%	2.0%	3.6%	4.8%	3.7%	3.5%	3.4%	2.0%
	L	.	.	.	.	.	-7.7%	-2.2%	2.1%	3.6%	2.7%	2.9%	2.7%	0.5%

Apart from economic data (GDP growth rates) and latest traffic trends (alignment with short-term traffic results) which have been updated, this Medium-Term Forecast update uses the same inputs as the ones used for the February publication.

Any user of the forecast is strongly advised to use the forecast range (low-growth to high-growth) as an indicator of risk. There are also a number of other important risks that this forecast has not included. In particular, the delicate economic situation on both sides of the Atlantic and the possibility of a future return to high oil prices present further down-side risks.

The EUROCONTROL Medium-Term Forecast will be fully updated in February 2010. The EUROCONTROL short-term forecast will also be published in parallel with this update (see Ref. 1). It will also be reviewed in December 2009.

¹ Eurocontrol Statistical Reference Area in the extended 2008 definition used in the MTF09 (Annex A).

**EUROCONTROL Medium-Term
Forecast update: IFR Flight
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1. INTRODUCTION

1.1 General

This report presents an update of the medium-term flight forecast that EUROCONTROL published in February (Ref. 2). After requests by stakeholders, and in particular to allow the capacity-planning process to use the most up-to-date information, the EUROCONTROL Statistics and Forecast Service (STATFOR) now refreshes the main inputs in September in addition to its original full medium-term forecast published in February.

The forecast describes annual numbers of instrument flight rules (IFR) flight movements for 2009 to 2015. The forecast presented here replaces the forecast issued in February 2009.

For this update, two changes have been made: the assumptions on economic growth have been updated using economic forecasts available in mid-September; and the traffic baseline has been re-aligned to take into account traffic to the end of August. For all other input assumptions see the description in Annex D of Ref. 2.

The forecast method is similar to the one used in the EUROCONTROL Medium-Term Forecast published in February 2009. More details on the method are given in Annex A of Ref. 2.

This report contains a summary and discussion of the forecast, including geographical definitions (Annex A, Annex B), economic assumptions (Annex C), forecast details for Europe as a whole (Annex D) and annual total forecasts per State (Annex E). Further forecast details at States are available through the STATFOR Interactive Dashboard.

STATFOR also prepares a short-term forecast (looking 2 years ahead) and a long-term forecast (20 years). Both are available in summary on the STATFOR web pages (Ref. 3). The September short- (Ref. 1) and medium-term forecasts are aligned, except for overflights where different methods are used.

2. TRAFFIC TRENDS IN 2009

Traffic in 2009 is still strongly influenced by the World economic downturn which started in 2008. The traffic decline has been affecting nearly all States in Europe since the beginning of the year. This Summer the decline has stabilised at -6%, which is above the average decrease for the first half of the year (-9%). Nevertheless, growth has been slightly below forecast, so the outlook for 2009 is now -6% rather than the -5% forecast in February.

Since Summer 2008, the global economic recession has settled, having a severe impact on the aviation sector. With fewer goods to ship and lower demand for air travel, aircraft operators had to cut capacities and to implement cost-reduction measures to survive. Load factors have recently recovered, but yields remain low because load factors in business class remain low.

For the first half of 2009, the number of IFR flights in Europe (ESRA08²) dropped to 4.6 million, a decrease of 9% compared to the same period last year. Traffic has stabilised over the third quarter, declining less (-6% compared to the third quarter of 2008) than during the first two quarters of the year.

Over the first eight months of 2009, the volume of traffic remained consistently below 2008 levels, corresponding to a reduction of approximately 2,200 flights a day between the two periods. The traffic volumes are aligned with the ones experienced in 2006.

Between January and August 2009, the traffic decline was generalised and strong in States with biggest flows: -12% for Spain, -10% for UK, -8% for Germany, Belgium&Luxembourg and Italy and, -7% for France (compared to the same period 2008, Figure 3). Very few States saw growth in local³ traffic, but a weak growth was observed in Turkey (+2.5%) driven by both domestic and international demand. Some States located in the Adriatic region have also shown a positive growth due to an increase in overflights.

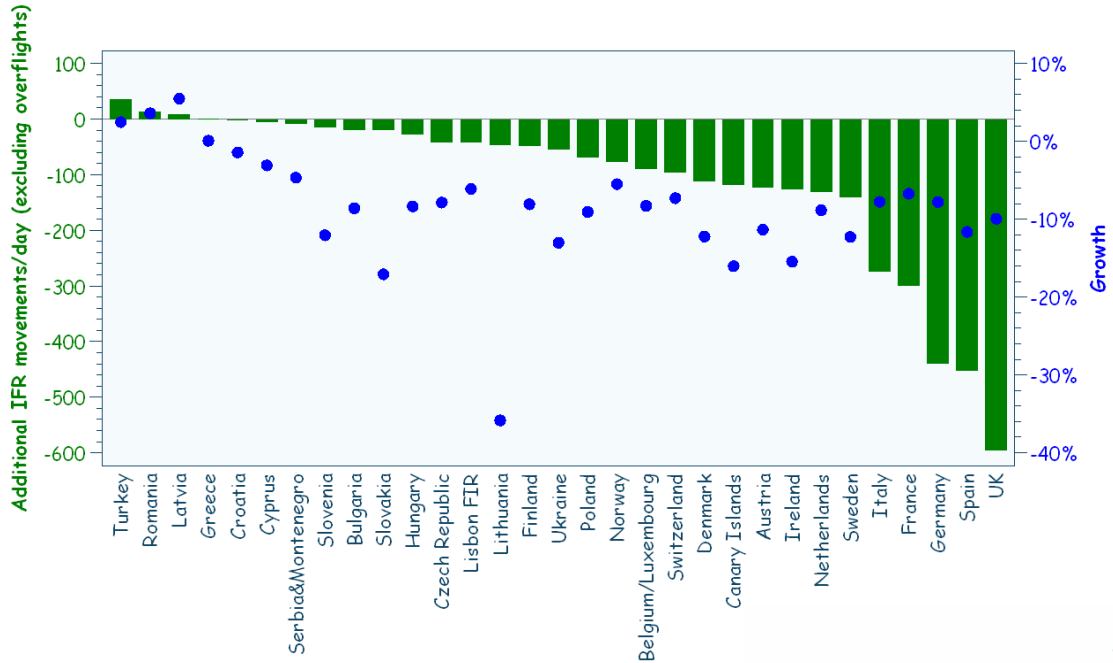
² See Annex A for definition.

³ Local traffic movements refer to arrivals, departures and internals.

Figure 3. Nearly all States in Europe saw a decrease in their local traffic during the first eight months of 2009.

Units: Additional IFR movements/day compared to January to August 2008 period, overflights excluded.

Note: Shows only States with more than 100 movements/day.



(c) EUROCONTROL 2009. WWW.EUROCONTROL.INT/STATFOR

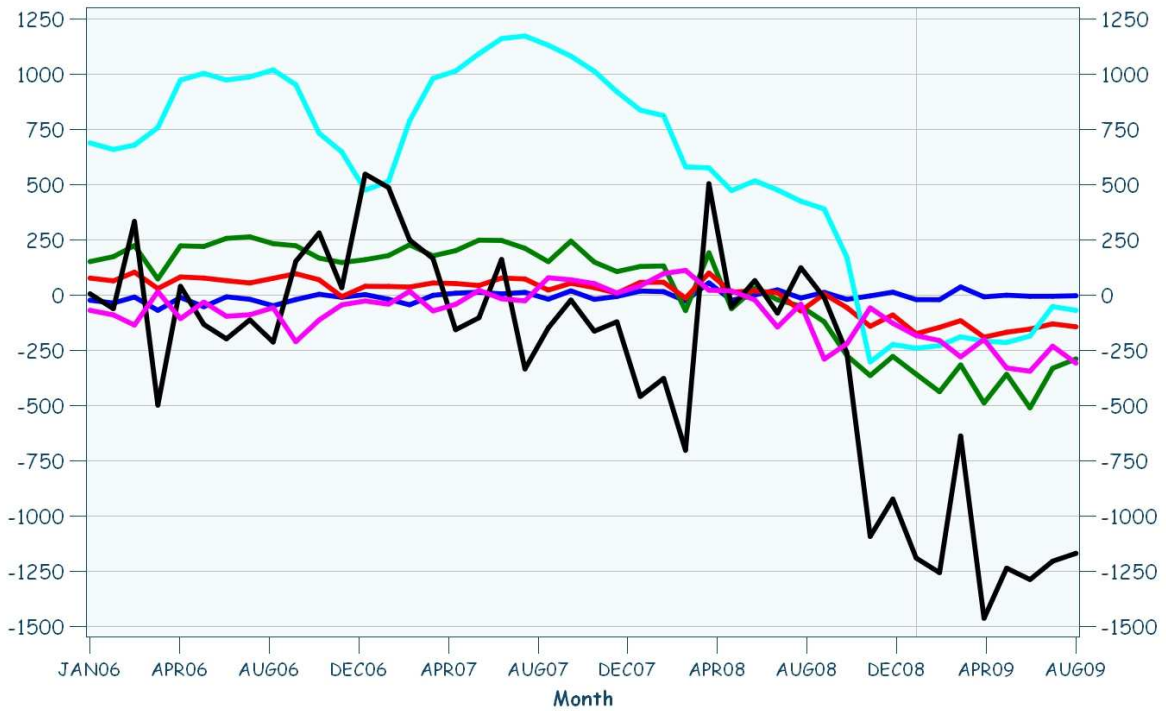
Figure 4 shows the growth per market segment for the last few years. All of the main market segments shrank from Summer 2008. Since the beginning of the year, strongest declines in growth have been observed for business aviation traffic (-18%), cargo (-16%) and charter traffic (-15%). Low-cost traffic showed more limited decline (-3%) with an average reduction of 200 flights a day⁴ compared to the first eight-month period of 2008. Scheduled traffic declined by 7% since the beginning of the year (compared to the same period in 2008).

For further discussion of the current situation, see the short-term forecast (Ref. 1). In brief, while the situation remains uncertain, growth has been slightly weaker than forecast in February, so the forecast for 2009 as a whole is now lower: nearer -6% than -5%.

⁴ For information, low-cost traffic share accounts for 20% of the total traffic in the European airspace.

Figure 4. All market segments have contracted since Summer 2008.

Additional Flights/Day since 12 Months before



Segment - Military - Business - All-Cargo
 - Low-Cost - Traditional - Non-Scheduled

(c) EUROCONTROL 2009. WWW.EUROCONTROL.INT/STATFOR



3. GROWTH IN IFR MOVEMENTS TO 2015

3.1 Summary of growth

The forecast is for 11.6 million IFR movements in the ESRA in 2015, 15% more than in 2008. The traffic will decline by more than 6% in 2009 and grow only slowly in 2010 (growth of 2%). In the later years, the growth recovers to more typical rates of 3.5%-5% per year

Figure 5 summarises the forecast results for Europe⁵. The forecast is for 11.6 million IFR movements in 2015, 15% more than in 2008. The high-growth scenario adds further 1.2 million movements (+10%) while the low-growth scenario deducts 1.2 million movements (-11%).

The traffic is forecast to decline by more than 6% in 2009 and to grow only slowly in 2010 (growth of 2%). In the later years, the growth recovers to more typical rates of 3.5%-5% per year, and averages at 2.0% annually for the whole forecast period 2009-2015.

The traffic is forecast to grow at a faster rate in 2012 (+4.8%) than in any other year. Leap year effect and, to a lesser extent, events (e.g. London Olympics, Euro12 football cup) partly explain this high rate. The events in this forecast are detailed in Annex D of Ref. 2.

The range between high- and low-growth scenarios in 2009 is quite narrow because two-thirds of the traffic is already known. In 2010 traffic forecast shows a large forecast range, due to the uncertainty around the time the traffic will take to recover. Even if a weak return to growth at the end of 2009 is implicit in the short-term forecast, the recovery could take longer, notably due to further capacity cuts during Winter 2009/2010 (see Ref. 1).

Figure 5. Summary of the forecast for the ESRA08⁶.

		2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	AAGR 2015/ 2008
IFR Flight Movements (Thousands)	H	9,564	10,085	10,613	11,195	11,679	12,219	12,783	3.4%
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	L	9,303	9,094	9,282	9,620	9,883	10,168	10,438	0.5%
Annual Growth (Compared to previous year)	H	-5.1%	5.4%	5.2%	5.5%	4.3%	4.6%	4.6%	3.4%
	B	.	3.9%	3.7%	5.0%	0.4%	-6.3%	2.0%	3.6%	4.8%	3.7%	3.5%	3.4%	2.0%
	L	.	.	.	.	.	-7.7%	-2.2%	2.1%	3.6%	2.7%	2.9%	2.7%	0.5%

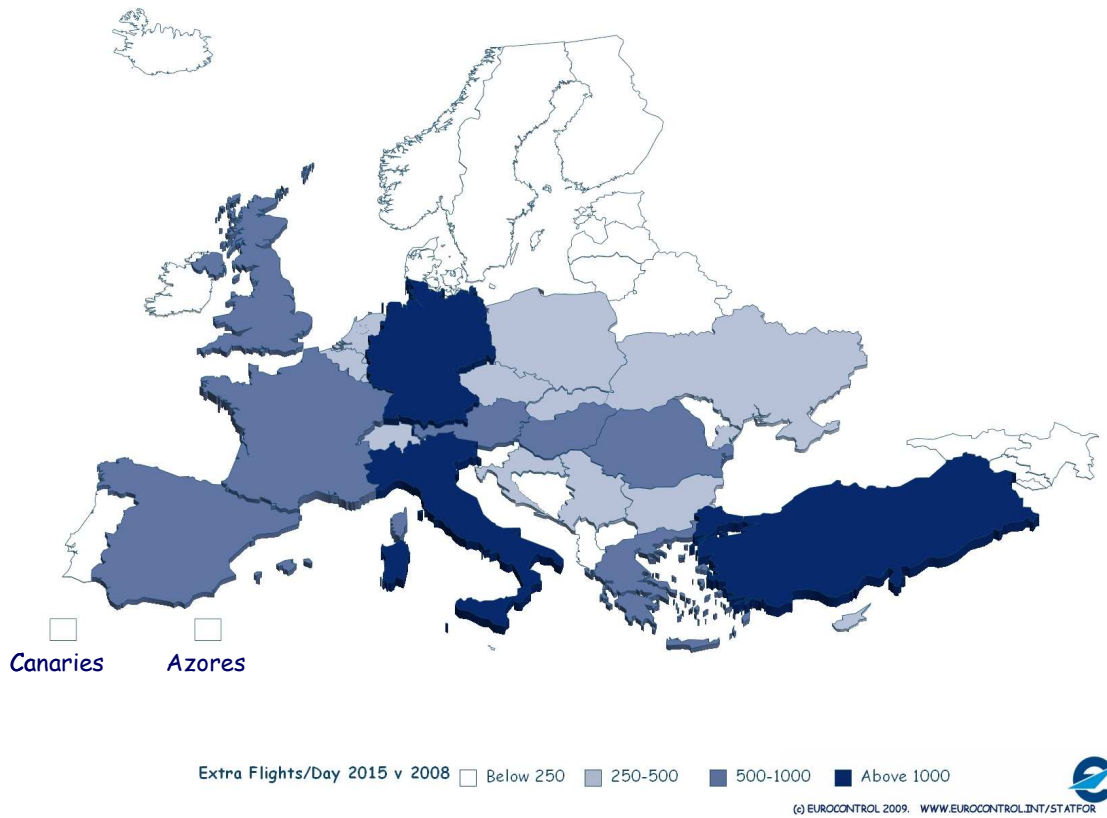
The traffic development is not uniform across the region. The growth (in percentage terms) remains, as in recent years, relatively stronger in the East (see Figure 1). In contrast, in terms of the number of additional movements per day, the traffic will increase the most in the big economies in the West (eg. Germany and Italy) but also

⁵ Figure 5 gives the forecast for ESRA08, Eurocontrol Statistical Reference Area in the 2008 composition which was used for the first time in the MTF09.

⁶ Eurocontrol Statistical Reference Area in the 2008 composition is now used in the STATFOR Medium-Term forecasts (see Annex A).

in Turkey, which is forecast to see one of the strongest traffic growth in Europe (see Figure 6).

Figure 6. Number of additional movements per day for each State (2015 v 2008)



3.2 Risks to the Forecast

Users of the forecast are strongly advised to use the forecast range (low-growth to high-growth) as an indicator of risk. This forecast is prepared in the conditions of an uncertain exit from a serious economic downturn which has a major effect on forecast traffic growth.

The main sources of uncertainty in the forecast are:

- This forecast is prepared during a serious economic downturn. Its ending and speed of recovery are the major prerequisites of future forecast growth in air traffic. The economic forecasts (Figure 12) were updated in September 2009 as their contribution in the MTF model is important. Nevertheless, the situation remains uncertain and the low- and high-growth scenarios may not entirely capture the risks in the economies on both side of the Atlantic.
- Network and route changes. The forecast is sensitive to changing overflight patterns. These are discussed in Section 3 of Ref. 2, and have often been the source of errors in the forecast.
- Tourism trends are quite variable. The medium-term forecast aims to be accurate over the seven-year period, rather than identifying which will be the new holiday “destination of preference” in a given year.
- Oil prices remain changeable with oil being increasingly an item of speculation and investment. Fuel accounting for 25-35% or even more of costs of the airlines, this can have an effect on fares and cost of travel for customer. In this forecast, changes in price of oil are not factored in.
- Participation of aviation in the Emission Trading Scheme has become much clearer. But possible other regulatory measures such as new tax regimes or further environmental limits contribute to the uncertainty of air transport growth.
- Terrorist attacks, wars and natural disasters. The last seven years have not been quiet ones for aviation. There is no reason to believe the next seven years will be uneventful, with the effects of an H1N1 flu pandemic one of the most obvious risks. The impact on air traffic could be a temporary one, or more significant.
- Local effects. Many local changes are significant to particular airports, but less so at the annual, State level. Some effects, such as the transfer of DHL operations from Brussels to Leipzig have been modelled, but there could be others which have not.

3.3 Comparison with latest forecast (February publication)

The updated medium-term forecast starts below the MTF09. At the approach of the end of the year, the forecast range for 2009 has narrowed. Overall, the new forecast ends, in 2015, just 0.7% below the February forecast.

Figure 7 shows the updated forecast (MTF09b) for the ESRA08⁷ compared with the forecast from February (MTF09). While the actual traffic in 2008 is still used as the baseline for the MTF09b, this September re-alignment with the short-term forecast brings much more certainty about the out-turn for 2009.

As traffic declined more strongly than planned at the beginning of the year, the first year of the forecast (2009) is 1.5% lower than in the MTF09. The 2009 forecast growth is now 6.3% below the 2008 baseline (0.6 million fewer movements).

MTF09b forecasts a traffic growth of 2.0% in 2010 (+0.5 percentage point compared to MTF09). The recovery in traffic growth seems to have slowed and according to latest short-term forecast (Ref. 1), the time to the recovery is therefore more uncertain which makes the forecast range larger than what it was (3 percentage points wider).

In the following years, the traffic growth is expected to come back to growth rates comparable to those forecast in MTF09. However, in 2012, the accumulation of events, coupled with an overall positive difference⁸ in GDP growth rates has increased the forecast traffic growth to 4.8% (compared to 4.3% in the February forecast). Nevertheless, the growth in the final periods (from 2013) of the forecast horizon is similar to the February ones (around 3.5%).

The average annual growth rates for the whole forecast period in MTF09b are comparable to the MTF09 ones (2.0%). As a result, by 2015 the updated forecast is only 0.7% below the February version.

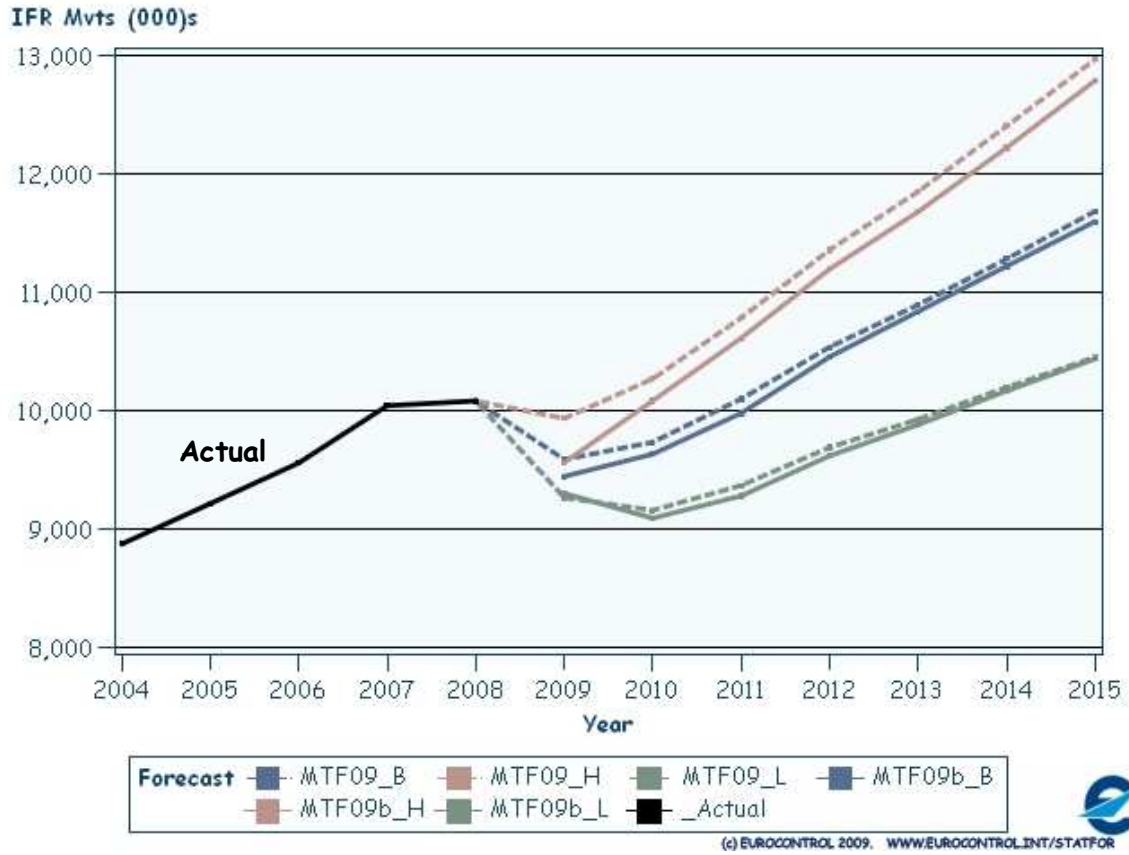
Even though the growth in traffic is expected to recover, a rapid 'bounce-back' to pre-2008 levels of traffic in terms of numbers of movements is not forecast. The period of lost growth will result in putting the traffic levels back by about 4 years as already stated in the last forecast, or even longer for a few States.

⁷ This comparison is done for ESRA08.

⁸ The average difference between September and February GDP figures for all States is positive as from 2012.

Figure 7. Forecast for the ESRA08 is slightly lower than last February one.

Note: MTF09 dashed lines, MTF09b solid lines.



4. GLOSSARY

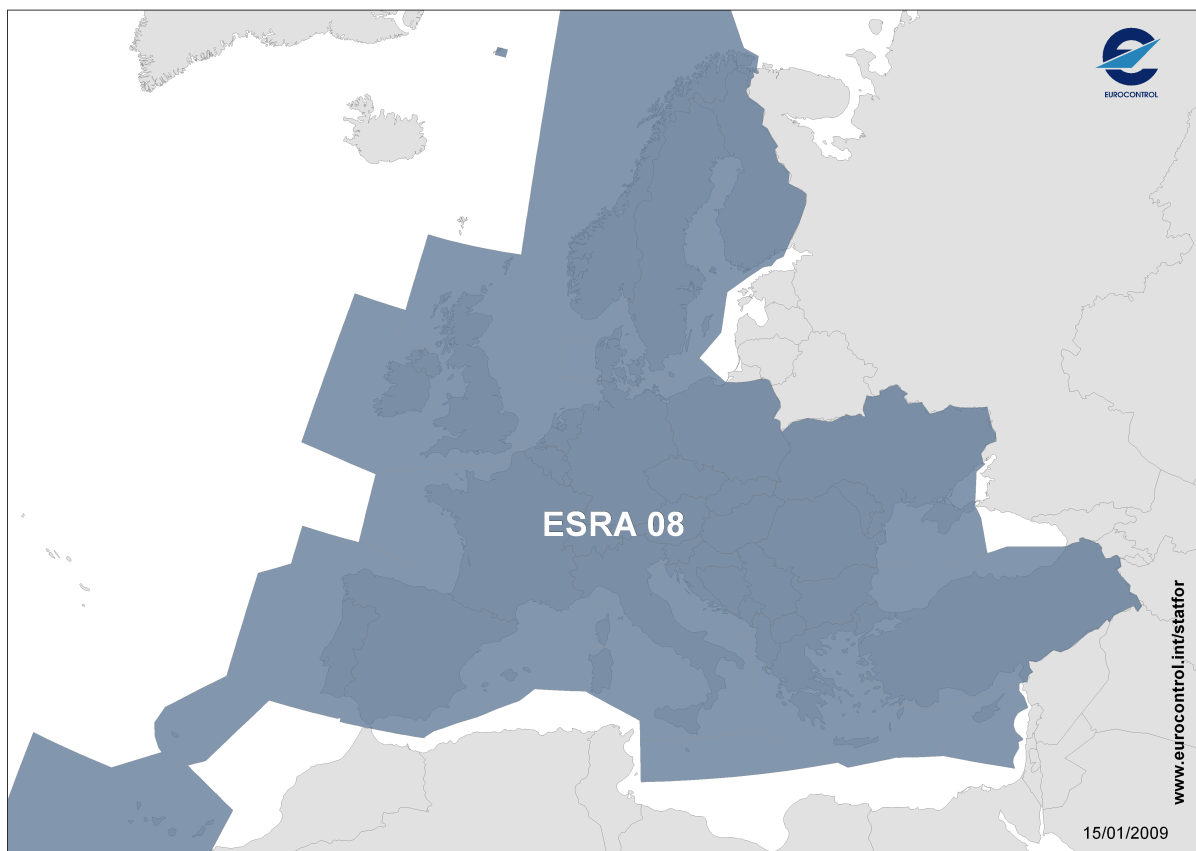
AAGR	Average annual growth
AEA	Association of European Airlines
B	(in tables) Baseline Scenario
CFMU	Eurocontrol Central Flow Management Unit
CRCO	Eurocontrol Central Route Charges Office
ESRA	Eurocontrol Statistical Reference Area (see Annex A)
EU27	European Union (27 States)
FIR	Flight Information Region
GDP	Gross Domestic Product
H	(in tables) High-Growth Scenario
IFR	Instrument Flight Rules
L	(in tables) Low-Growth Scenario
MTF	Medium-Term Forecast
MTF09	February 2009 publication of the MTF
MTF09b	September 2009 publication of the MTF
SES	Single European Sky
STATFOR	Eurocontrol Statistics and Forecast Service
STF	Short-Term Forecast
TR	Traffic Region (a grouping of TZs)
TZ	Traffic Zone (≈State, except for Spain, Portugal, Belgium and Luxembourg, Serbia and Montenegro)
UIR	Upper Flight Information Region

Detailed explanations of the above terms are available in EUROCONTROL Glossary for Flight Statistics & Forecasts (Ref. 4).

ANNEX A. EUROCONTROL STATISTICAL REFERENCE AREA

The EUROCONTROL Statistical Reference Area (ESRA) is designed to include as much as possible of the ECAC area for which data are available from a range of sources within the Agency (CRCO, CFMU and STATFOR) sources. It is used for high-level reports from the Agency, when referring to 'total Europe'. The ESRA changes only slowly with time; a region is added to the ESRA only when there is a full year's data from all sources, so that growth calculations are possible. In this report, the new 'ESRA08' definition illustrated in the map below is used for the first time (see Ref. 5 for more detail). Note that the EUROCONTROL forecast includes also regions outside of the ESRA (eg. Armenia or Georgia).

Figure 8. The EUROCONTROL Statistical Reference Area.



The regions may be taken as referring to FIRs and UIRs or the airspace volumes of ACCs and other control centres. In the medium-term forecast, traffic zones are represented by an aggregate of FIRs & UIR of States. These do not take delegation of airspace into account. The differences between charging areas and ACCs can have a big impact on overflight counts (and thus on total counts where the total is dominated by overflights). For the ESRA as a whole, there is only a small proportion of overflights, so that the difference between an FIR and an ACC definition is small.

ANNEX B. TRAFFIC REGION DEFINITIONS

For this forecast, traffic flows are described as being to or from one of a number of traffic regions listed in Figure 9 (for example in Figure 15). Each region is made up of a number of traffic zones. Traffic zones are indicated in the table for brevity by the first letters of the ICAO location codes.

The traffic regions are defined for statistical convenience and do not reflect an official position of the EUROCONTROL Agency.

The ESRA was defined in the previous section. For flow purposes, this is split into a “North-West” region mostly of mature air traffic markets, a “Mediterranean” region stretching from the Canaries to Turkey and with a significant tourist element, and an Eastern region.

The ‘Other region’ includes the Baltic States and Oceanic. The Former CIS Region includes Ukraine (a member of EUROCONTROL and part of ESRA08) and Armenia and Azerbaijan (members of ECAC). In time these will join the ESRA.

More details are available in STATFOR Geographical Hierarchy document (Ref. 5).

Figure 9. Regions used in flow statistics.

ICAO region/country		
ESRA		
ESRA1	ESRA North-West	LO EB EL EK EF LF ED ET EI EH EN ES LS EG LN
ESRA2	ESRA Mediterranean	GC LC LG LI LP LM GE LT
ESRA3	ESRA East	EP LA LB LD LH LJ LK LQ LR LU LW LY LZ
World 1	North Atlantic	K, C, B + PA, PO, PF, PP
World 2	Middle-East	O+LL+LV
World 3	North-Africa	DA, HE, HL, GM, HS, DT
World 4	Southern Africa	G; D; H; F (except DA, HE, HL, GM, GE, HS, DT and ESRA (GC))
World 5	Far-East	V, Z, R, W (except ZZZZ)
World 6	Oceania	A, P, Y, N (except AFIL, PA, PO, PF, PP)
World 7	Mid-Atlantic	M; T
World 8	South-Atlantic	S
World 9	Former CIS Region	U (including Ukraine which is now part of ESRA08)
Other	Other	EE EV EY GE, Shanwick Oc., Bodo Oc., Santa Maria FIR

ANNEX C. SUMMARY OF FORECAST ASSUMPTIONS

The only changes to the assumptions since February are in the economic forecasts. For all other assumptions see Annex D of the February forecast (Ref. 2).

C.1 Economic Growth

For reference, the economic growth inputs are summarised in Figure 12. These all come from a single coherent source, Oxford Economics Ltd., and were last updated in September 2009. The low- and high-growth scenarios are developed as variations around these forecasts.

GDP growth is one of the major factors of the air traffic growth in the MTF model. Figure 10 illustrates how the economic outlook has changed since the MTF09 produced seven months ago. The forecast economic growth for EU27 is now lower by some 1.1 percentage points for 2009 and about the same (0.1 percentage points lower) for 2010. It also remains slightly lower for 2011 and gets slightly higher in the later years.

Figure 10. GDP forecast for EU27 has been revised downwards in 2009.

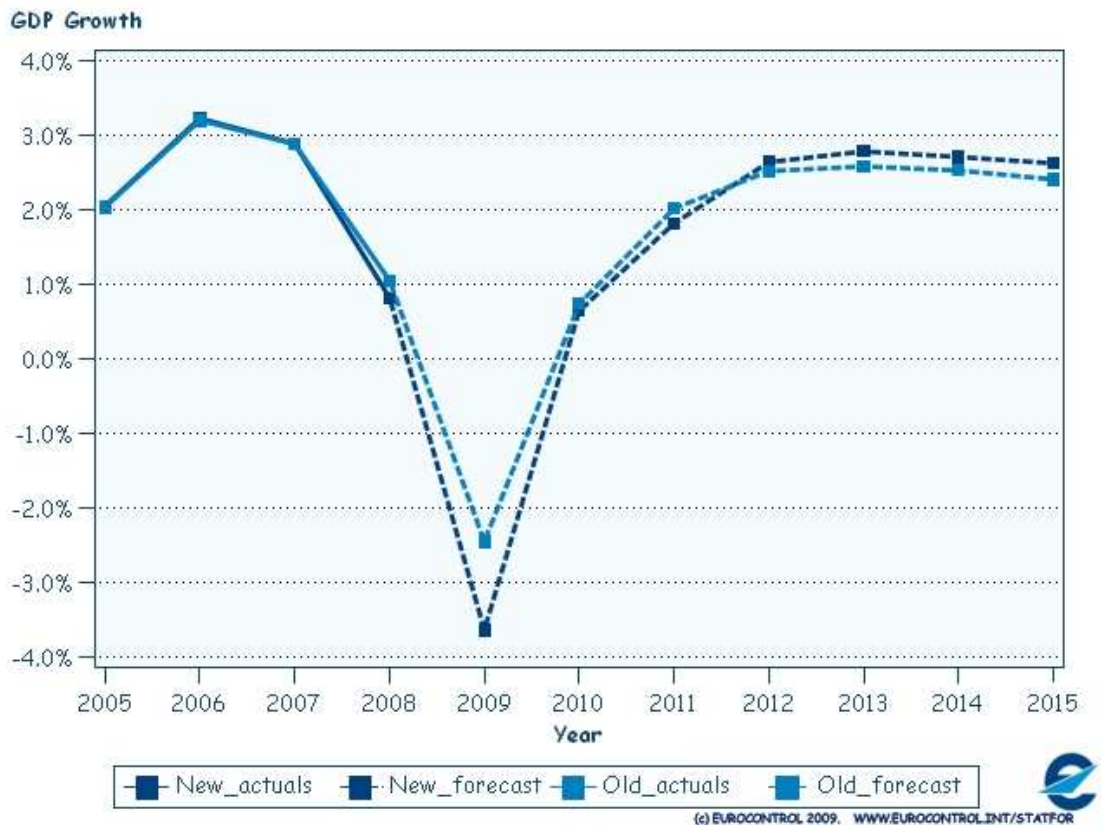


Figure 11 shows the changes between February and September OEF forecasts at States level. In 2009, all States have seen their growth revised downwards except Greece, Norway, Poland and France. Some States will see stronger growth in the late years (eg Turkey, Romania, Finland, Ireland and Ukraine), some will stay below the MTF09 GDP figures (eg Poland, Spain and Italy).

Figure 11. GDP forecast for ESRA States has been strongly reduced, especially in 2009.

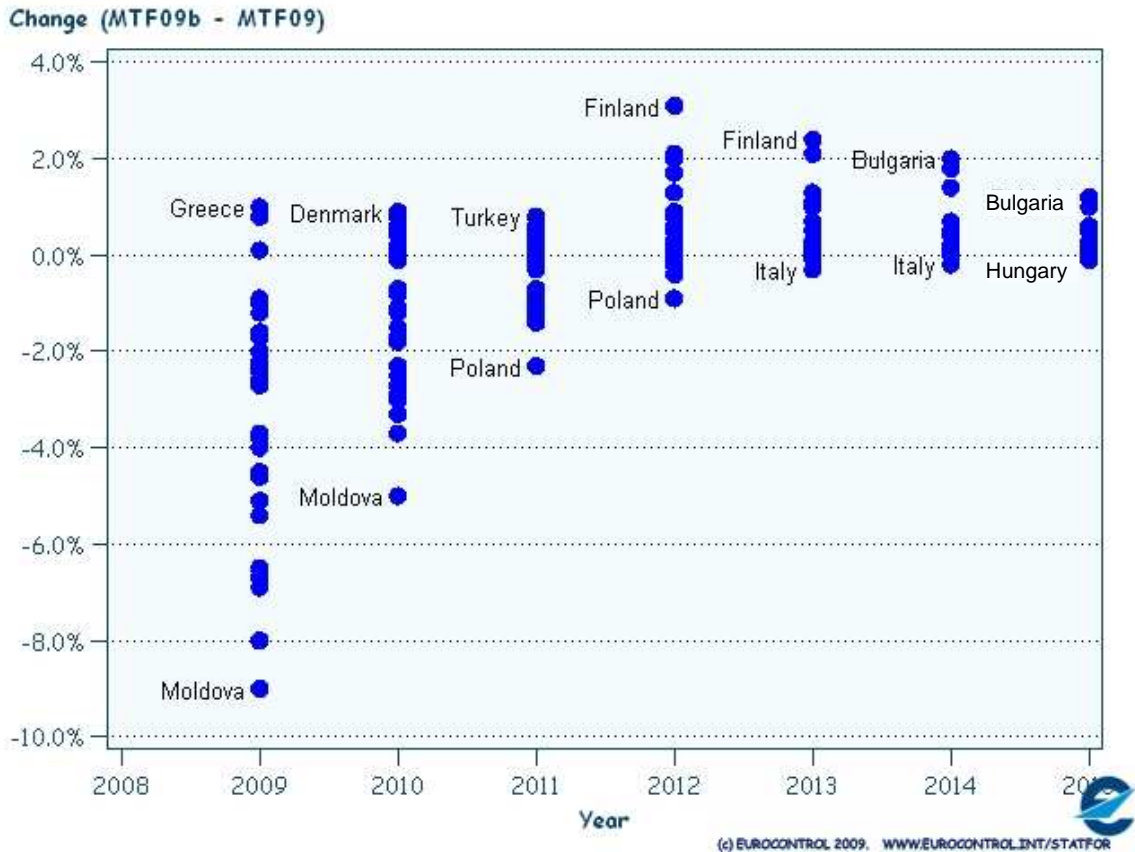


Figure 12. GDP Growth by Traffic Zone.

Source: 1993-2004 from STATFOR records. 2005 onwards from Oxford Economics Ltd, Sep09

Comments: Real GDP Growth in local currency.

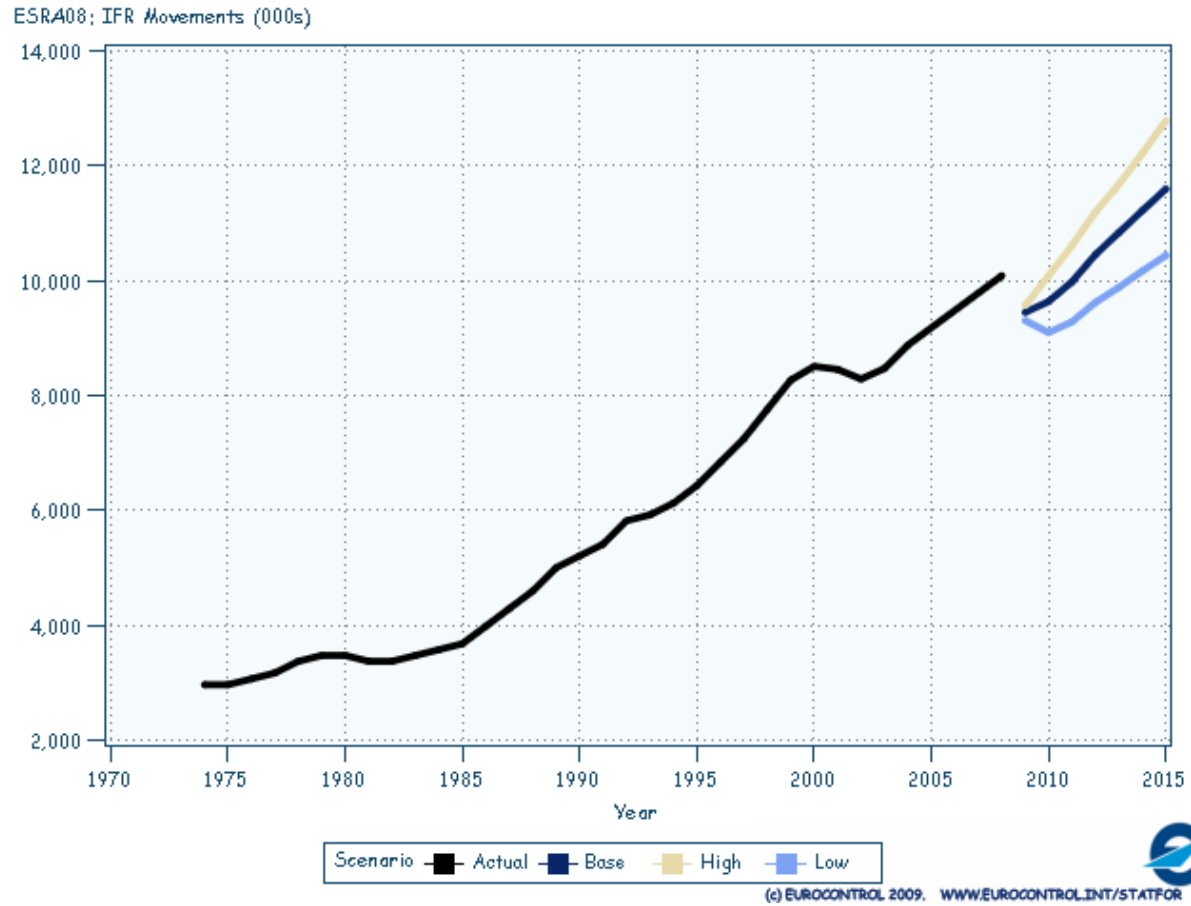
Units: Growth per year. Data last updated: 14/09/2009

	Actual			Base							
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	
Albania	5.5%	6.0%	6.8%	0.5%	2.3%	5.0%	4.5%	4.5%	4.5%	4.5%	
Armenia	13%	14%	6.8%	(19%)	-1.5%	3.3%	8.0%	7.5%	6.9%	5.0%	
Austria	3.4%	3.4%	2.1%	-3.6%	0.6%	1.9%	2.5%	2.0%	1.9%	1.9%	
Azerbaijan	35%	25%	11%	3.8%	11%	12%	9.0%	6.8%	6.3%	6.2%	
Belarus	10%	8.2%	10%	-4.0%	2.3%	5.4%	5.6%	3.6%	3.3%	3.3%	
Belgium/Luxembourg	3.0%	2.6%	1.0%	-3.4%	0.1%	1.4%	1.9%	2.0%	2.0%	2.0%	
Bosnia-Herzegovina	6.8%	5.9%	5.4%	-2.9%	0.3%	3.7%	5.0%	5.0%	5.0%	5.0%	
Bulgaria	6.3%	6.2%	6.1%	-5.0%	-0.5%	3.5%	5.9%	6.9%	6.8%	5.9%	
Canary Islands	4.0%	3.6%	0.9%	-3.6%	-0.4%	0.9%	2.2%	2.8%	2.9%	2.9%	
Croatia	4.8%	5.5%	2.4%	-5.4%	0.0%	3.4%	4.8%	4.8%	4.5%	4.5%	
Cyprus	4.1%	4.4%	3.6%	0.3%	1.7%	3.5%	3.7%	3.7%	3.7%	3.7%	
Czech Republic	7.0%	6.1%	2.8%	-4.1%	1.3%	4.1%	4.7%	4.5%	4.5%	4.4%	
Denmark	3.4%	1.7%	-1.2%	-2.8%	1.9%	2.5%	3.1%	2.9%	2.9%	2.8%	
Estonia	10%	6.3%	-3.6%	(14%)	-2.0%	3.0%	7.2%	6.7%	5.0%	5.0%	
FYROM	4.0%	5.9%	5.0%	-3.1%	0.8%	3.2%	4.5%	4.5%	4.5%	4.5%	
Finland	4.9%	3.1%	1.9%	-7.0%	0.8%	2.7%	5.7%	5.1%	3.4%	2.9%	
France	2.4%	2.3%	0.3%	-2.1%	0.9%	1.5%	2.2%	2.2%	2.0%	2.0%	
Georgia	9.4%	12%	2.2%	-1.0%	2.5%	4.8%	7.0%	6.0%	6.0%	6.0%	
Germany	3.4%	2.6%	1.0%	-5.0%	1.0%	1.6%	2.3%	2.6%	2.5%	2.3%	
Greece	4.5%	4.0%	2.9%	0.0%	0.7%	2.2%	3.5%	3.2%	3.1%	3.2%	
Hungary	4.1%	1.3%	0.4%	-6.6%	-1.6%	4.0%	6.0%	6.4%	5.2%	4.7%	
Iceland	4.5%	5.5%	0.3%	(11%)	-2.0%	1.0%	3.6%	3.5%	3.2%	3.0%	
Ireland	5.4%	6.0%	-3.0%	-7.9%	-1.0%	3.0%	3.0%	3.4%	3.5%	3.6%	
Israel	5.2%	5.4%	4.0%	-0.5%	1.5%	3.8%	4.8%	4.5%	3.7%	3.5%	
Italy	2.1%	1.5%	-1.0%	-5.1%	0.3%	1.5%	1.6%	1.6%	1.6%	1.6%	
Kazakhstan	11%	8.2%	3.0%	-2.4%	2.5%	7.0%	6.8%	6.5%	6.2%	6.0%	
Latvia	12%	10%	-4.6%	(19%)	-3.5%	2.7%	4.5%	7.2%	8.2%	6.6%	
Lisbon FIR	1.4%	1.9%	0.0%	-3.1%	0.7%	1.9%	2.4%	2.5%	2.4%	2.3%	
Lithuania	7.8%	8.9%	3.0%	(20%)	-3.0%	3.9%	7.7%	11%	9.2%	7.5%	
Malta	3.3%	3.9%	2.7%	-1.6%	0.5%	1.6%	3.0%	3.0%	3.0%	3.0%	
Moldova	4.8%	3.0%	7.2%	-2.5%	1.0%	4.5%	7.2%	6.5%	5.5%	5.5%	
Netherlands	3.4%	3.6%	2.0%	-4.4%	-0.2%	1.7%	2.5%	2.6%	2.3%	2.2%	
Norway	1.5%	3.2%	2.1%	-1.5%	0.8%	2.0%	2.2%	2.3%	2.3%	2.3%	
Poland	6.2%	6.8%	4.9%	1.2%	1.1%	2.9%	4.7%	5.6%	5.5%	5.5%	

	Actual			Base							
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	
Romania	7.8%	6.2%	7.4%	-7.3%	0.8%	4.8%	6.5%	6.5%	6.1%	5.3%	
Russian Federation	7.6%	8.0%	5.8%	-9.5%	3.4%	4.0%	5.8%	6.4%	5.2%	5.0%	
Santa Maria FIR	1.4%	1.9%	0.0%	-3.1%	0.7%	1.9%	2.4%	2.5%	2.4%	2.3%	
Serbia&Montenegro	5.2%	6.9%	5.4%	-4.8%	0.2%	4.3%	5.4%	5.0%	5.0%	5.0%	
Slovakia	8.5%	10%	6.6%	-5.3%	1.1%	4.3%	5.2%	5.1%	4.9%	4.7%	
Slovenia	6.1%	6.8%	3.4%	-3.5%	0.4%	3.5%	3.7%	3.8%	3.8%	3.8%	
Spain	4.0%	3.6%	0.9%	-3.6%	-0.4%	0.9%	2.2%	2.8%	2.9%	2.9%	
Sweden	4.5%	2.7%	-0.4%	-4.6%	1.4%	2.2%	2.9%	2.5%	2.4%	2.4%	
Switzerland	3.6%	3.6%	1.8%	-1.9%	0.5%	1.6%	2.0%	1.9%	1.9%	1.8%	
Turkey	6.9%	4.8%	1.3%	-7.4%	4.8%	7.4%	8.6%	7.8%	7.0%	6.3%	
UK	2.9%	2.6%	0.8%	-4.4%	0.7%	2.2%	3.1%	3.4%	3.4%	3.4%	
Ukraine	7.4%	7.6%	2.3%	(16%)	2.0%	5.4%	8.5%	8.5%	6.5%	5.3%	
Uzbekistan	7.3%	9.5%	9.0%	5.2%	7.0%	6.5%	6.5%	4.5%	3.5%	3.2%	

ANNEX D. SUMMARY OF THE FORECAST FOR THE ESRA⁹

Figure 13. Growth in the ESRA.



Source: Airport Pair Forecast dated: 23Sep09.

⁹ Eurocontrol Statistical Reference Area in the new 2008 composition used for the first time in the MTF09 (Annex A).

Figure 14. Traffic on the main flow categories for the ESRA08.

		IFR Movements(000s)											Annual Growth											AAGR 2015/ 2008		
		2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013		2014	2015
Total: Internal	H	.	.	.	.	.	7,717	8,103	8,492	8,923	9,266	9,656	10,065	.	.	.	.	.	-5.7%	5.0%	4.8%	5.1%	3.9%	4.2%	4.2%	3.0%
	B	7,407	7,640	7,903	8,241	8,182	7,624	7,744	7,987	8,332	8,605	8,875	9,141	.	3.2%	3.4%	4.3%	-0.7%	-6.8%	1.6%	3.1%	4.3%	3.3%	3.1%	3.0%	1.6%
	L	.	.	.	.	.	7,509	7,308	7,425	7,664	7,842	8,040	8,224	.	.	.	.	.	-8.2%	-2.7%	1.6%	3.2%	2.3%	2.5%	2.3%	0.1%
Total: Arr/Dep	H	.	.	.	.	.	1,744	1,875	2,008	2,150	2,283	2,424	2,571	.	.	.	.	.	-3.5%	7.5%	7.1%	7.1%	6.2%	6.2%	6.1%	5.2%
	B	1,418	1,519	1,590	1,721	1,807	1,722	1,787	1,883	2,005	2,109	2,214	2,318	.	7.1%	4.7%	8.2%	5.0%	-4.7%	3.8%	5.4%	6.5%	5.2%	5.0%	4.7%	3.6%
	L	.	.	.	.	.	1,695	1,685	1,751	1,843	1,922	2,004	2,085	.	.	.	.	.	-6.2%	-0.6%	3.9%	5.3%	4.3%	4.3%	4.0%	2.1%
Total: Overflight	H	.	.	.	.	.	102	106	114	122	130	139	148	.	.	.	.	.	8.9%	4.2%	6.8%	7.3%	6.8%	6.6%	6.4%	6.7%
	B	51	59	67	81	94	100	103	109	116	123	130	137	.	15%	14%	20%	16%	7.1%	2.8%	5.8%	6.6%	5.9%	5.6%	5.4%	5.6%
	L	.	.	.	.	.	99	101	106	113	118	124	130	.	.	.	.	.	5.4%	2.2%	5.1%	6.0%	5.1%	4.9%	4.7%	4.8%
Grand Total	H	.	.	.	.	.	9,564	10,085	10,613	11,195	11,679	12,219	12,783	.	.	.	.	.	-5.1%	5.4%	5.2%	5.5%	4.3%	4.6%	4.6%	3.4%
	B	8,876	9,218	9,561	10,043	10,083	9,446	9,634	9,979	10,454	10,837	11,219	11,596	.	3.9%	3.7%	5.0%	0.4%	-6.3%	2.0%	3.6%	4.8%	3.7%	3.5%	3.4%	2.0%
	L	.	.	.	.	.	9,303	9,094	9,282	9,620	9,883	10,168	10,438	.	.	.	.	.	-7.7%	-2.2%	2.1%	3.6%	2.7%	2.9%	2.7%	0.5%

Source: Airport Pair Forecast dated: 23Sep09.

Figure 15. Traffic and growth on the biggest region-to-region flows through the ESRA.

			IFR Movements(000s)											Annual Growth											AAGR 2015/ 2008			
			2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013		2014	2015	
1	ESRA North-W	ESRA North-W	H	.	.	.	.	.	3697.8	3829.9	3969.6	4117.3	4227.5	4352.8	4483.3	.	.	.	.	.	-6.9%	3.6%	3.6%	3.7%	2.7%	3.0%	3.0%	1.7%
			B	3868.4	3878.2	3934.1	3995.6	3973.1	3644.5	3648.6	3731.8	3857.8	3939.7	4019.1	4102.3	.	0.3%	1.4%	1.6%	-0.6%	-8.3%	0.1%	2.3%	3.4%	2.1%	2.0%	2.1%	0.5%
			L	.	.	.	.	.	3601.2	3476.3	3507.2	3591.3	3639.1	3697.0	3746.1	.	.	.	.	.	-9.4%	-3.5%	0.9%	2.4%	1.3%	1.6%	1.3%	-0.8%
2	ESRA Mediter	ESRA North-W	H	.	.	.	.	.	1588.7	1690.9	1774.8	1861.5	1930.7	2006.6	2086.8	.	.	.	.	.	-5.7%	6.4%	5.0%	4.9%	3.7%	3.9%	4.0%	3.1%
			B	1509.9	1569.7	1606.0	1709.5	1684.3	1571.3	1618.8	1671.5	1745.6	1803.5	1858.1	1911.4	.	4.0%	2.3%	6.4%	-1.5%	-6.7%	3.0%	3.3%	4.4%	3.3%	3.0%	2.9%	1.8%
			L	.	.	.	.	.	1537.6	1501.1	1525.2	1577.8	1618.3	1662.1	1701.8	.	.	.	.	.	-8.7%	-2.4%	1.6%	3.4%	2.6%	2.7%	2.4%	0.1%
3	ESRA Mediter	ESRA Mediter	H	.	.	.	.	.	1461.8	1536.1	1620.6	1712.4	1789.0	1874.5	1964.7	.	.	.	.	.	-3.7%	5.1%	5.5%	5.7%	4.5%	4.8%	4.8%	3.8%
			B	1310.4	1375.1	1471.4	1573.3	1518.2	1456.8	1499.3	1550.0	1614.7	1680.7	1745.8	1801.7	.	4.9%	7.0%	6.9%	-3.5%	-4.0%	2.9%	3.4%	4.2%	4.1%	3.9%	3.2%	2.5%
			L	.	.	.	.	.	1433.9	1409.9	1436.5	1480.9	1521.6	1565.2	1610.5	.	.	.	.	.	-5.6%	-1.7%	1.9%	3.1%	2.7%	2.9%	2.9%	0.8%
4	ESRA East	ESRA North-W	H	.	.	.	.	.	495.9	534.5	570.8	617.4	655.5	701.4	749.6	.	.	.	.	.	-6.7%	7.8%	6.8%	8.2%	6.2%	7.0%	6.9%	5.0%
			B	372.2	436.1	471.7	502.7	531.4	485.3	495.0	519.4	555.5	583.8	614.6	646.6	.	17%	8.2%	6.6%	5.7%	-8.7%	2.0%	4.9%	6.9%	5.1%	5.3%	5.2%	2.8%
			L	.	.	.	.	.	477.9	465.7	479.7	504.4	525.4	547.4	568.2	.	.	.	.	.	(10%)	-2.6%	3.0%	5.1%	4.2%	4.2%	3.8%	1.0%
5	ESRA North-W	North Atlant	H	.	.	.	.	.	315.7	330.3	349.5	365.0	379.3	394.6	411.4	.	.	.	.	.	-7.5%	4.6%	5.8%	4.4%	3.9%	4.0%	4.2%	2.7%
			B	298.6	312.3	321.2	339.6	341.4	312.5	317.9	331.8	347.1	356.4	365.6	375.1	.	4.6%	2.8%	5.7%	0.5%	-8.5%	1.7%	4.4%	4.6%	2.7%	2.6%	2.6%	1.4%
			L	.	.	.	.	.	309.5	303.1	311.8	323.1	330.4	337.5	344.5	.	.	.	.	.	-9.4%	-2.0%	2.9%	3.6%	2.3%	2.2%	2.1%	0.1%
6	ESRA North-W	North-Africa	H	.	.	.	.	.	214.4	229.2	244.9	260.9	276.1	292.8	310.5	.	.	.	.	.	1.7%	6.9%	6.9%	6.5%	5.8%	6.0%	6.1%	5.7%
			B	161.7	176.9	185.6	202.5	210.9	212.4	222.0	234.0	248.6	262.0	275.1	288.6	.	9.4%	5.0%	9.1%	4.1%	0.7%	4.5%	5.4%	6.3%	5.4%	5.0%	4.9%	4.6%
			L	.	.	.	.	.	210.1	213.3	222.5	234.0	244.8	256.3	268.1	.	.	.	.	.	-0.4%	1.5%	4.3%	5.2%	4.6%	4.7%	4.6%	3.5%
7	ESRA East	ESRA East	H	.	.	.	.	.	199.4	216.6	233.7	255.5	276.1	300.0	325.4	.	.	.	.	.	2.1%	8.6%	7.9%	9.3%	8.1%	8.7%	8.5%	7.6%
			B	158.2	166.6	179.2	188.6	195.2	196.0	203.6	215.3	231.2	245.4	261.0	277.2	.	5.3%	7.6%	5.2%	3.5%	0.4%	3.9%	5.7%	7.4%	6.2%	6.3%	6.2%	5.1%
			L	.	.	.	.	.	193.6	193.1	200.5	211.0	221.0	231.3	241.2	.	.	.	.	.	-0.8%	-0.3%	3.9%	5.2%	4.7%	4.7%	4.3%	3.1%
8	ESRA East	ESRA Mediter	H	.	.	.	.	.	179.9	197.9	216.1	237.1	256.4	277.8	301.0	.	.	.	.	.	0.9%	7.5%	10%	10%	9.2%	8.9%	8.4%	7.9%
			B	107.6	131.9	151.3	173.8	175.3	177.9	187.6	200.3	216.5	231.6	247.4	263.2	.	23%	15%	15%	0.8%	-4.8%	5.4%	8.0%	8.4%	7.4%	7.7%	7.4%	5.6%
			L	.	.	.	.	.	173.5	174.8	183.3	195.3	206.3	218.1	229.7	.	.	.	.	.	-8.7%	2.8%	6.0%	6.6%	5.7%	6.1%	5.8%	3.3%

Source: Airport Pair Forecast dated: 23Sep09.

ANNEX E. FUTURE TRAFFIC AND GROWTH

E.1 Summary of the Forecast. Annual IFR Movements 2004-2015.

Figure 16. Annual traffic per traffic zone and 2008-2015 average annual growth.

		2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	AAGR 2015/ 2008
Albania	H	.	.	.	.	.	153	166	175	185	193	201	211	5.1%
	B	105	116	119	142	148	150	156	163	171	178	184	191	3.7%
	L	.	.	.	.	.	147	146	150	156	161	167	172	2.2%
Armenia	H	.	.	.	.	.	55	60	64	70	75	80	85	7.3%
	B	39	42	43	48	52	54	56	59	64	68	72	76	5.6%
	L	.	.	.	.	.	53	52	54	58	61	65	68	4.0%
Austria	H	.	.	.	.	.	1,150	1,228	1,298	1,378	1,445	1,518	1,594	4.1%
	B	954	1,049	1,092	1,180	1,204	1,135	1,169	1,216	1,279	1,330	1,382	1,432	2.5%
	L	.	.	.	.	.	1,114	1,096	1,122	1,166	1,202	1,239	1,274	0.8%
Azerbaijan	H	.	.	.	.	.	108	120	132	145	157	169	183	7.8%
	B	.	.	92	96	108	106	112	122	133	143	153	163	6.1%
	L	.	.	.	.	.	104	103	111	121	129	137	146	4.4%
Belarus	H	.	.	.	.	.	184	203	218	236	254	272	290	5.5%
	B	119	130	146	173	199	181	188	199	214	228	242	256	3.6%
	L	.	.	.	.	.	178	176	183	195	205	216	226	1.8%
Belgium/Luxembourg	H	.	.	.	.	.	1,046	1,106	1,157	1,209	1,252	1,301	1,352	2.9%
	B	982	1,007	1,056	1,100	1,108	1,032	1,052	1,085	1,131	1,165	1,199	1,234	1.6%
	L	.	.	.	.	.	1,014	988	1,004	1,036	1,062	1,089	1,114	0.1%
Bosnia-Herzegovina	H	.	.	.	.	.	223	244	260	279	295	312	331	6.2%
	B	126	159	168	201	218	219	229	241	256	268	280	293	4.3%
	L	.	.	.	.	.	214	213	220	231	241	250	259	2.5%
Bulgaria	H	.	.	.	.	.	475	514	558	607	649	693	739	6.4%
	B	358	395	402	444	478	465	480	512	552	588	623	655	4.6%
	L	.	.	.	.	.	457	452	473	504	530	559	586	2.9%
Canary Islands	H	.	.	.	.	.	270	282	295	312	328	346	366	2.5%
	B	278	291	303	308	307	266	270	276	288	299	311	323	0.7%
	L	.	.	.	.	.	262	252	253	260	266	273	280	-1.4%
Croatia	H	.	.	.	.	.	426	464	493	530	560	594	627	5.8%
	B	282	331	339	398	422	419	438	459	488	511	534	557	4.1%
	L	.	.	.	.	.	410	409	422	441	460	479	496	2.3%

		2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	AAGR 2015/ 2008
Cyprus	H	.	.	.	.	.	279	303	327	354	379	406	435	6.9%
	B	206	209	217	242	272	274	287	305	326	346	366	386	5.1%
	L	.	.	.	.	.	270	272	284	300	315	330	345	3.4%
Czech Republic	H	.	.	.	.	.	647	694	740	794	840	893	949	4.8%
	B	552	597	612	646	682	638	658	689	732	767	803	841	3.0%
	L	.	.	.	.	.	627	618	636	669	693	719	745	1.3%
Denmark	H	.	.	.	.	.	566	600	630	661	688	718	748	2.5%
	B	586	585	602	631	629	557	569	588	615	635	656	677	1.0%
	L	.	.	.	.	.	548	535	544	564	578	594	607	-0.5%
Estonia	H	.	.	.	.	.	155	169	180	194	209	223	236	4.5%
	B	.	145	137	153	174	152	155	163	175	186	196	207	2.5%
	L	.	.	.	.	.	149	146	151	160	169	177	185	0.9%
FYROM	H	.	.	.	.	.	127	138	147	156	164	174	184	5.6%
	B	105	111	118	123	125	123	127	133	141	147	154	161	3.7%
	L	.	.	.	.	.	121	119	123	129	133	139	144	2.0%
Finland	H	.	.	.	.	.	244	255	266	282	295	308	320	3.0%
	B	243	242	246	245	261	241	240	247	260	271	280	288	1.5%
	L	.	.	.	.	.	237	229	233	243	251	257	263	0.1%
France	H	.	.	.	.	.	2,867	3,037	3,176	3,316	3,431	3,561	3,697	2.9%
	B	2,665	2,747	2,854	3,025	3,020	2,829	2,881	2,968	3,088	3,183	3,270	3,361	1.5%
	L	.	.	.	.	.	2,782	2,714	2,754	2,835	2,898	2,969	3,034	0.1%
Georgia	H	.	.	.	.	.	79	88	96	104	112	120	128	6.9%
	B	65	74	73	80	80	78	82	88	95	102	109	115	5.3%
	L	.	.	.	.	.	76	76	80	87	92	98	103	3.7%
Germany	H	.	.	.	.	.	2,977	3,161	3,313	3,488	3,630	3,788	3,950	3.3%
	B	2,712	2,852	2,971	3,108	3,151	2,931	3,002	3,101	3,248	3,356	3,468	3,579	1.8%
	L	.	.	.	.	.	2,879	2,811	2,863	2,973	3,050	3,134	3,209	0.3%
Greece	H	.	.	.	.	.	667	719	759	803	842	886	932	5.5%
	B	534	548	566	621	643	655	683	712	748	778	809	842	3.9%
	L	.	.	.	.	.	646	647	666	694	715	738	760	2.4%
Hungary	H	.	.	.	.	.	614	663	712	766	813	865	919	5.7%
	B	524	579	605	615	622	603	624	659	703	741	779	816	4.0%
	L	.	.	.	.	.	593	587	610	644	672	701	729	2.3%
Iceland	H	.	.	.	.	.	106	114	121	128	134	141	148	3.8%
	B	88	96	100	105	114	104	108	113	119	123	128	132	2.2%
	L	.	.	.	.	.	103	102	106	110	114	117	120	0.8%
Ireland	H	.	.	.	.	.	537	561	605	647	687	733	785	3.9%
	B	503	536	565	598	601	531	532	562	597	624	652	683	1.8%
	L	.	.	.	.	.	524	506	523	547	564	583	602	0.0%

		2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	AAGR 2015/ 2008
Italy	H	.	.	.	.	.	1,687	1,799	1,897	1,998	2,084	2,180	2,281	4.0%
	B	1,520	1,577	1,641	1,779	1,736	1,688	1,755	1,822	1,902	1,967	2,035	2,103	2.8%
	L	.	.	.	.	.	1,644	1,625	1,664	1,721	1,767	1,817	1,865	1.0%
Latvia	H	.	.	.	.	.	213	235	249	266	284	303	320	5.2%
	B	142	155	176	202	225	208	217	226	241	255	269	283	3.3%
	L	.	.	.	.	.	205	204	210	221	232	243	253	1.7%
Lisbon FIR	H	.	.	.	.	.	414	436	458	482	504	528	549	3.3%
	B	363	380	401	427	438	408	417	430	449	465	477	490	1.6%
	L	.	.	.	.	.	401	391	397	409	416	424	434	-0.1%
Lithuania	H	.	.	.	.	.	192	215	228	246	264	282	296	4.4%
	B	148	163	173	195	219	188	197	206	221	235	249	262	2.6%
	L	.	.	.	.	.	185	184	189	201	212	222	232	0.8%
Malta	H	.	.	.	.	.	86	94	100	107	113	120	128	6.1%
	B	73	75	76	82	84	85	90	94	100	104	109	114	4.4%
	L	.	.	.	.	.	83	84	87	91	94	98	102	2.7%
Moldova	H	.	.	.	.	.	41	46	50	54	59	64	69	7.7%
	B	24	26	28	35	41	40	42	44	48	52	56	59	5.4%
	L	.	.	.	.	.	39	39	41	44	46	49	52	3.5%
Netherlands	H	.	.	.	.	.	1,014	1,067	1,119	1,174	1,218	1,268	1,320	2.8%
	B	968	996	1,056	1,108	1,090	1,001	1,020	1,054	1,102	1,137	1,172	1,207	1.5%
	L	.	.	.	.	.	986	960	978	1,013	1,039	1,067	1,093	0.0%
Norway	H	.	.	.	.	.	527	546	568	591	612	635	659	2.6%
	B	467	484	513	536	550	521	529	542	559	573	588	603	1.3%
	L	.	.	.	.	.	516	506	511	522	530	539	547	-0.1%
Poland	H	.	.	.	.	.	570	611	652	707	752	807	863	5.0%
	B	364	423	491	556	612	561	578	606	649	684	723	764	3.2%
	L	.	.	.	.	.	553	547	565	597	623	651	679	1.5%
Romania	H	.	.	.	.	.	449	490	533	579	622	670	720	7.1%
	B	372	411	416	432	444	442	462	492	530	563	598	632	5.2%
	L	.	.	.	.	.	435	435	456	484	508	534	559	3.3%
Santa Maria FIR	H	.	.	.	.	.	114	120	127	134	140	147	154	4.1%
	B	102	106	107	109	116	112	114	119	125	129	134	138	2.5%
	L	.	.	.	.	.	110	108	111	115	118	121	124	1.0%
Serbia&Montenegro	H	.	.	.	.	.	503	545	582	622	657	693	733	5.7%
	B	315	361	393	458	497	493	512	538	571	599	627	654	4.0%
	L	.	.	.	.	.	485	480	497	522	542	564	585	2.4%
Slovakia	H	.	.	.	.	.	333	364	391	422	450	481	514	5.9%
	B	284	318	330	324	345	326	341	360	385	406	428	451	3.9%
	L	.	.	.	.	.	320	319	331	350	365	381	397	2.0%

		2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	AAGR 2015/ 2008
Slovenia	H	.	.	.	.	.	321	347	368	394	415	438	461	5.0%
	B	222	257	267	306	327	315	326	341	361	377	393	409	3.3%
	L	.	.	.	.	.	309	306	315	329	341	354	365	1.6%
Spain	H	.	.	.	.	.	1,621	1,729	1,815	1,906	1,986	2,082	2,182	3.2%
	B	1,470	1,561	1,641	1,779	1,747	1,599	1,647	1,691	1,760	1,826	1,890	1,950	1.6%
	L	.	.	.	.	.	1,572	1,531	1,546	1,590	1,630	1,673	1,714	-0.3%
Sweden	H	.	.	.	.	.	671	711	749	792	829	869	909	3.1%
	B	665	664	689	708	736	659	667	691	727	756	785	814	1.4%
	L	.	.	.	.	.	649	625	640	666	687	708	729	-0.1%
Switzerland	H	.	.	.	.	.	1,046	1,112	1,162	1,216	1,260	1,308	1,357	3.1%
	B	977	1,008	1,032	1,093	1,096	1,033	1,061	1,094	1,139	1,172	1,205	1,239	1.8%
	L	.	.	.	.	.	1,012	987	1,004	1,035	1,058	1,083	1,107	0.1%
Turkey	H	.	.	.	.	.	853	925	1,009	1,106	1,183	1,257	1,335	7.2%
	B	562	642	693	757	822	840	884	950	1,031	1,106	1,176	1,235	6.0%
	L	.	.	.	.	.	827	837	887	952	1,011	1,073	1,135	4.7%
Ukraine	H	.	.	.	.	.	385	415	450	497	534	576	618	6.2%
	B	312	341	345	373	406	379	390	417	457	488	521	553	4.5%
	L	.	.	.	.	.	372	368	388	421	446	473	499	3.0%
UK	H	.	.	.	.	.	2,320	2,428	2,557	2,668	2,756	2,861	2,974	2.4%
	B	2,266	2,385	2,465	2,550	2,514	2,291	2,318	2,402	2,515	2,583	2,652	2,724	1.1%
	L	.	.	.	.	.	2,265	2,202	2,244	2,321	2,374	2,435	2,490	-0.1%
ESRA02	H	.	.	.	.	.	9,451	9,966	10,485	11,051	11,524	12,050	12,601	3.4%
	B	8,746	9,088	9,439	9,916	9,954	9,335	9,524	9,861	10,323	10,697	11,068	11,434	2.0%
	L	.	.	.	.	.	9,193	8,987	9,171	9,498	9,753	10,030	10,292	0.5%
EU27	H	.	.	.	.	.	8,945	9,438	9,918	10,439	10,877	11,369	11,884	3.3%
	B	8,343	8,638	8,937	9,440	9,470	8,832	9,000	9,307	9,733	10,071	10,412	10,751	1.8%
	L	.	.	.	.	.	8,695	8,487	8,647	8,946	9,175	9,424	9,659	0.3%
ESRA08	H	.	.	.	.	.	9,564	10,085	10,613	11,195	11,679	12,219	12,783	3.4%
	B	8,876	9,218	9,561	10,043	10,083	9,446	9,634	9,979	10,454	10,837	11,219	11,596	2.0%
	L	.	.	.	.	.	9,303	9,094	9,282	9,620	9,883	10,168	10,438	0.5%
SES	H	.	.	.	.	.	9,310	9,815	10,309	10,849	11,302	11,812	12,345	3.3%
	B	8,718	9,016	9,337	9,794	9,833	9,193	9,370	9,687	10,125	10,474	10,827	11,178	1.8%
	L	.	.	.	.	.	9,052	8,841	9,006	9,313	9,549	9,806	10,048	0.3%

Source: Airport Pair Forecast dated: 23Sep09.

E.2 Summary of the Forecast. Growth Rates 2005-2015

Figure 17. Annual growth rates per traffic zone and 2008-2015 average annual growth.

		2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	AAGR 2015/ 2008
Albania	H	.	.	.	.	3.4%	8.6%	5.4%	5.4%	4.3%	4.5%	4.6%	5.1%
	B	11%	2.7%	19%	4.5%	1.3%	4.2%	4.1%	5.0%	3.9%	3.7%	3.5%	3.7%
	L	.	.	.	.	-0.8%	-0.8%	2.9%	4.1%	3.2%	3.3%	3.2%	2.2%
Armenia	H	.	.	.	.	6.4%	9.1%	7.0%	8.2%	7.0%	6.8%	6.4%	7.3%
	B	7.7%	2.7%	11%	8.0%	4.2%	3.8%	5.8%	7.6%	6.5%	6.1%	5.5%	5.6%
	L	.	.	.	.	1.6%	-2.3%	5.0%	6.9%	5.9%	5.8%	5.1%	4.0%
Austria	H	.	.	.	.	-4.4%	6.8%	5.7%	6.2%	4.9%	5.1%	5.0%	4.1%
	B	9.9%	4.1%	8.1%	2.0%	-5.7%	3.1%	4.0%	5.2%	4.0%	3.9%	3.6%	2.5%
	L	.	.	.	.	-7.4%	-1.7%	2.4%	3.9%	3.1%	3.1%	2.8%	0.8%
Azerbaijan	H	.	.	.	.	0.2%	11%	10%	9.9%	8.2%	7.9%	7.8%	7.8%
	B	.	.	4.2%	13%	-1.4%	5.1%	9.0%	9.1%	7.5%	7.1%	6.7%	6.1%
	L	.	.	.	.	-3.8%	-0.5%	8.0%	8.3%	6.8%	6.6%	6.4%	4.4%
Belarus	H	.	.	.	.	-7.5%	9.9%	7.4%	8.5%	7.5%	7.2%	6.7%	5.5%
	B	9.3%	13%	18%	16%	-9.3%	4.1%	5.7%	7.6%	6.5%	6.0%	5.7%	3.6%
	L	.	.	.	.	(11%)	-1.2%	4.1%	6.5%	5.6%	5.1%	4.6%	1.8%
Belgium/Luxembourg	H	.	.	.	.	-5.5%	5.7%	4.7%	4.4%	3.6%	3.9%	3.9%	2.9%
	B	2.5%	4.9%	4.2%	0.7%	-6.9%	2.0%	3.1%	4.2%	3.0%	3.0%	2.9%	1.6%
	L	.	.	.	.	-8.4%	-2.6%	1.7%	3.2%	2.5%	2.6%	2.3%	0.1%
Bosnia-Herzegovina	H	.	.	.	.	2.6%	9.3%	6.6%	7.2%	5.8%	6.0%	5.8%	6.2%
	B	26%	5.5%	19%	8.5%	0.6%	4.7%	4.9%	6.3%	4.9%	4.6%	4.4%	4.3%
	L	.	.	.	.	-1.6%	-0.5%	3.5%	4.9%	4.2%	4.0%	3.6%	2.5%
Bulgaria	H	.	.	.	.	-0.6%	8.2%	8.4%	8.9%	6.9%	6.7%	6.7%	6.4%
	B	10%	1.6%	11%	7.7%	-2.7%	3.1%	6.6%	7.9%	6.6%	5.9%	5.1%	4.6%
	L	.	.	.	.	-4.3%	-1.3%	4.8%	6.5%	5.3%	5.3%	4.9%	2.9%
Canary Islands	H	.	.	.	.	(12%)	4.4%	4.6%	5.8%	5.2%	5.6%	5.6%	2.5%
	B	4.9%	4.0%	1.7%	-0.2%	(13%)	1.3%	2.4%	4.3%	3.8%	3.9%	3.8%	0.7%
	L	.	.	.	.	(15%)	-3.7%	0.4%	2.8%	2.3%	2.7%	2.4%	-1.4%
Croatia	H	.	.	.	.	1.1%	8.8%	6.2%	7.4%	5.8%	6.0%	5.6%	5.8%
	B	18%	2.4%	17%	6.0%	-0.7%	4.6%	4.7%	6.3%	4.8%	4.5%	4.2%	4.1%
	L	.	.	.	.	-2.7%	-0.4%	3.2%	4.6%	4.3%	4.0%	3.6%	2.3%
Cyprus	H	.	.	.	.	2.4%	8.6%	7.9%	8.3%	7.1%	7.1%	7.2%	6.9%
	B	1.3%	4.1%	12%	12%	0.8%	4.6%	6.1%	7.1%	6.0%	5.8%	5.5%	5.1%
	L	.	.	.	.	-1.0%	0.7%	4.6%	5.7%	4.7%	4.8%	4.6%	3.4%

		2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	AAGR 2015/ 2008
Czech Republic	H	.	.	.	.	-5.0%	7.2%	6.6%	7.2%	5.9%	6.3%	6.3%	4.8%
	B	8.2%	2.4%	5.6%	5.5%	-6.5%	3.1%	4.8%	6.3%	4.7%	4.8%	4.7%	3.0%
	L	.	.	.	.	-8.0%	-1.5%	3.0%	5.0%	3.7%	3.8%	3.5%	1.3%
Denmark	H	.	.	.	.	(10%)	6.0%	4.8%	5.0%	4.1%	4.3%	4.2%	2.5%
	B	-0.1%	2.9%	4.8%	-0.3%	(11%)	2.2%	3.3%	4.6%	3.3%	3.3%	3.2%	1.0%
	L	.	.	.	.	(13%)	-2.5%	1.7%	3.6%	2.5%	2.7%	2.3%	-0.5%
Estonia	H	.	.	.	.	(11%)	9.1%	6.6%	7.9%	7.2%	6.7%	6.2%	4.5%
	B	.	-5.7%	12%	13%	(13%)	2.2%	4.9%	7.3%	6.3%	5.6%	5.4%	2.5%
	L	.	.	.	.	(14%)	-2.1%	3.3%	6.0%	5.4%	4.8%	4.4%	0.9%
FYROM	H	.	.	.	.	1.0%	9.3%	6.0%	6.3%	5.5%	5.8%	5.9%	5.6%
	B	5.3%	6.8%	3.9%	2.0%	-1.9%	3.3%	4.8%	5.8%	4.7%	4.7%	4.7%	3.7%
	L	.	.	.	.	-3.7%	-1.7%	3.4%	4.9%	3.8%	3.9%	3.8%	2.0%
Finland	H	.	.	.	.	-6.3%	4.2%	4.5%	6.0%	4.8%	4.3%	4.0%	3.0%
	B	-0.3%	1.4%	-0.3%	6.3%	-7.7%	-0.3%	3.1%	5.4%	4.0%	3.2%	3.1%	1.5%
	L	.	.	.	.	-9.0%	-3.4%	1.7%	4.3%	3.2%	2.5%	2.1%	0.1%
France	H	.	.	.	.	-5.1%	5.9%	4.6%	4.4%	3.5%	3.8%	3.8%	2.9%
	B	3.1%	3.9%	6.0%	-0.2%	-6.3%	1.8%	3.0%	4.1%	3.1%	2.8%	2.8%	1.5%
	L	.	.	.	.	-7.9%	-2.5%	1.5%	3.0%	2.2%	2.4%	2.2%	0.1%
Georgia	H	.	.	.	.	-0.9%	11%	8.6%	9.3%	7.3%	7.1%	6.9%	6.9%
	B	14%	-1.2%	9.7%	-0.0%	-2.9%	4.9%	7.3%	8.6%	6.9%	6.6%	5.9%	5.3%
	L	.	.	.	.	-5.0%	-0.7%	6.2%	7.8%	6.2%	6.3%	5.8%	3.7%
Germany	H	.	.	.	.	-5.5%	6.2%	4.8%	5.3%	4.1%	4.4%	4.3%	3.3%
	B	5.2%	4.2%	4.6%	1.4%	-7.0%	2.4%	3.3%	4.7%	3.3%	3.3%	3.2%	1.8%
	L	.	.	.	.	-8.6%	-2.4%	1.9%	3.8%	2.6%	2.7%	2.4%	0.3%
Greece	H	.	.	.	.	3.7%	7.8%	5.5%	5.8%	4.9%	5.2%	5.3%	5.5%
	B	2.5%	3.2%	9.9%	3.4%	1.9%	4.3%	4.2%	5.0%	4.1%	4.1%	4.0%	3.9%
	L	.	.	.	.	0.5%	0.2%	3.0%	4.1%	3.1%	3.2%	3.1%	2.4%
Hungary	H	.	.	.	.	-1.2%	7.9%	7.4%	7.6%	6.2%	6.3%	6.3%	5.7%
	B	11%	4.4%	1.8%	1.1%	-3.1%	3.5%	5.6%	6.8%	5.4%	5.1%	4.7%	4.0%
	L	.	.	.	.	-4.6%	-1.0%	3.9%	5.5%	4.4%	4.3%	4.0%	2.3%
Iceland	H	.	.	.	.	-6.6%	7.7%	6.0%	5.6%	4.8%	4.9%	4.9%	3.8%
	B	8.4%	4.1%	5.7%	8.0%	-8.3%	3.9%	4.4%	5.3%	3.6%	3.6%	3.5%	2.2%
	L	.	.	.	.	-9.6%	-0.4%	3.2%	4.3%	3.1%	2.9%	2.8%	0.8%
Ireland	H	.	.	.	.	(11%)	4.5%	7.8%	6.9%	6.2%	6.8%	7.1%	3.9%
	B	6.6%	5.4%	5.9%	0.5%	(12%)	0.3%	5.7%	6.2%	4.5%	4.6%	4.6%	1.8%
	L	.	.	.	.	(13%)	-3.5%	3.5%	4.5%	3.2%	3.3%	3.2%	0.0%
Italy	H	.	.	.	.	-2.8%	6.7%	5.4%	5.3%	4.3%	4.6%	4.6%	4.0%
	B	3.8%	4.0%	8.4%	-2.4%	-2.8%	4.0%	3.8%	4.4%	3.4%	3.4%	3.4%	2.8%
	L	.	.	.	.	-5.3%	-1.1%	2.4%	3.4%	2.7%	2.8%	2.7%	1.0%

		2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	AAGR 2015/ 2008
Latvia	H	.	.	.	.	-5.5%	10%	6.1%	7.0%	6.7%	6.6%	5.8%	5.2%
	B	9.1%	13%	15%	11%	-7.4%	4.0%	4.4%	6.4%	5.8%	5.6%	5.2%	3.3%
	L	.	.	.	.	-9.0%	-0.6%	2.9%	5.2%	5.0%	4.8%	4.3%	1.7%
Lisbon FIR	H	.	.	.	.	-5.6%	5.4%	5.0%	5.3%	4.5%	4.8%	4.0%	3.3%
	B	4.5%	5.7%	6.3%	2.7%	-6.9%	2.2%	3.2%	4.4%	3.6%	2.7%	2.6%	1.6%
	L	.	.	.	.	-8.4%	-2.5%	1.4%	3.2%	1.7%	1.8%	2.3%	-0.1%
Lithuania	H	.	.	.	.	( 12%)	11%	6.4%	7.8%	7.3%	6.8%	5.1%	4.4%
	B	10%	6.0%	13%	12%	(14%)	4.6%	4.7%	7.1%	6.4%	5.9%	5.4%	2.6%
	L	.	.	.	.	( 16%)	-0.5%	3.1%	5.9%	5.5%	5.1%	4.4%	0.8%
Malta	H	.	.	.	.	2.0%	8.9%	6.6%	6.7%	5.9%	6.2%	6.3%	6.1%
	B	3.0%	0.2%	8.1%	3.4%	0.7%	5.4%	4.9%	5.8%	4.8%	4.8%	4.7%	4.4%
	L	.	.	.	.	-1.5%	0.9%	3.5%	4.6%	3.8%	4.0%	3.8%	2.7%
Moldova	H	.	.	.	.	-0.2%	12%	8.5%	9.8%	8.2%	8.2%	8.1%	7.7%
	B	8.9%	7.8%	25%	18%	-2.8%	4.3%	7.0%	8.8%	7.3%	7.1%	6.7%	5.4%
	L	.	.	.	.	-4.6%	-1.5%	5.6%	7.6%	6.1%	6.1%	5.7%	3.5%
Netherlands	H	.	.	.	.	-7.0%	5.3%	4.9%	4.9%	3.8%	4.1%	4.1%	2.8%
	B	2.9%	6.0%	4.9%	-1.6%	-8.2%	1.9%	3.3%	4.6%	3.1%	3.1%	3.0%	1.5%
	L	.	.	.	.	-9.5%	-2.6%	1.9%	3.6%	2.6%	2.7%	2.5%	0.0%
Norway	H	.	.	.	.	-4.3%	3.7%	3.9%	4.1%	3.4%	3.8%	3.8%	2.6%
	B	3.6%	6.1%	4.5%	2.6%	-5.4%	1.6%	2.5%	3.2%	2.5%	2.6%	2.6%	1.3%
	L	.	.	.	.	-6.3%	-1.9%	1.1%	2.2%	1.5%	1.7%	1.6%	-0.1%
Poland	H	.	.	.	.	-7.0%	7.3%	6.7%	8.4%	6.4%	7.2%	6.9%	5.0%
	B	16%	16%	13%	10%	-8.3%	2.9%	4.9%	7.1%	5.3%	5.7%	5.6%	3.2%
	L	.	.	.	.	-9.7%	-1.0%	3.2%	5.7%	4.3%	4.6%	4.3%	1.5%
Romania	H	.	.	.	.	1.1%	9.1%	8.7%	8.8%	7.5%	7.6%	7.5%	7.1%
	B	10%	1.3%	4.0%	2.7%	-0.6%	4.6%	6.5%	7.6%	6.3%	6.1%	5.7%	5.2%
	L	.	.	.	.	-2.2%	0.1%	4.7%	6.2%	5.0%	5.1%	4.7%	3.3%
Santa Maria FIR	H	.	.	.	.	-1.9%	6.1%	5.4%	5.4%	4.6%	4.7%	4.7%	4.1%
	B	3.5%	0.9%	1.7%	6.5%	-3.6%	2.3%	4.3%	4.8%	3.7%	3.4%	3.3%	2.5%
	L	.	.	.	.	-5.0%	-2.2%	2.9%	3.9%	2.7%	2.6%	2.4%	1.0%
Serbia&Montenegro	H	.	.	.	.	1.3%	8.4%	6.7%	6.9%	5.6%	5.6%	5.7%	5.7%
	B	15%	8.7%	16%	8.6%	-0.7%	3.8%	5.1%	6.1%	5.0%	4.6%	4.3%	4.0%
	L	.	.	.	.	-2.5%	-0.9%	3.5%	4.9%	3.9%	4.0%	3.7%	2.4%
Slovakia	H	.	.	.	.	-3.5%	9.2%	7.4%	8.1%	6.5%	6.9%	7.0%	5.9%
	B	12%	3.8%	-1.6%	6.4%	-5.4%	4.4%	5.6%	7.1%	5.5%	5.4%	5.2%	3.9%
	L	.	.	.	.	-7.3%	-0.4%	3.8%	5.7%	4.4%	4.4%	4.0%	2.0%
Slovenia	H	.	.	.	.	-1.8%	8.2%	5.9%	7.0%	5.4%	5.5%	5.3%	5.0%
	B	16%	3.7%	15%	6.8%	-3.7%	3.6%	4.5%	5.9%	4.5%	4.3%	4.0%	3.3%
	L	.	.	.	.	-5.4%	-1.1%	3.0%	4.4%	3.8%	3.6%	3.3%	1.6%

		2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	AAGR 2015/ 2008
Spain	H	.	.	.	.	-7.2%	6.6%	5.0%	5.0%	4.2%	4.8%	4.8%	3.2%
	B	6.2%	5.1%	8.4%	-1.8%	-8.5%	3.0%	2.7%	4.1%	3.7%	3.5%	3.2%	1.6%
	L	.	.	.	.	(10%)	-2.6%	0.9%	2.9%	2.5%	2.6%	2.5%	-0.3%
Sweden	H	.	.	.	.	-8.8%	6.0%	5.2%	5.8%	4.7%	4.8%	4.6%	3.1%
	B	-0.1%	3.8%	2.8%	3.9%	(10%)	1.1%	3.7%	5.2%	3.9%	3.8%	3.7%	1.4%
	L	.	.	.	.	(12%)	-3.6%	2.3%	4.2%	3.1%	3.2%	2.9%	-0.1%
Switzerland	H	.	.	.	.	-4.6%	6.3%	4.5%	4.6%	3.6%	3.8%	3.8%	3.1%
	B	3.1%	2.4%	5.9%	0.3%	-5.7%	2.6%	3.1%	4.1%	2.9%	2.8%	2.8%	1.8%
	L	.	.	.	.	-7.7%	-2.5%	1.7%	3.1%	2.2%	2.4%	2.1%	0.1%
Turkey	H	.	.	.	.	3.7%	8.5%	9.0%	9.6%	7.0%	6.2%	6.2%	7.2%
	B	14%	8.0%	9.2%	8.6%	2.2%	5.2%	7.4%	8.6%	7.3%	6.3%	5.1%	6.0%
	L	.	.	.	.	0.6%	1.2%	6.0%	7.4%	6.2%	6.1%	5.7%	4.7%
Ukraine	H	.	.	.	.	-5.1%	7.7%	8.6%	10%	7.5%	7.8%	7.4%	6.2%
	B	9.3%	1.3%	8.2%	8.7%	-6.7%	3.0%	7.0%	9.5%	6.8%	6.7%	6.2%	4.5%
	L	.	.	.	.	-8.2%	-1.3%	5.6%	8.3%	6.0%	6.1%	5.4%	3.0%
UK	H	.	.	.	.	-7.7%	4.6%	5.3%	4.4%	3.3%	3.8%	3.9%	2.4%
	B	5.3%	3.4%	3.5%	-1.4%	-8.9%	1.2%	3.6%	4.7%	2.7%	2.7%	2.7%	1.1%
	L	.	.	.	.	-9.9%	-2.8%	1.9%	3.4%	2.3%	2.5%	2.3%	-0.1%
ESRA02	H	.	.	.	.	-5.1%	5.5%	5.2%	5.4%	4.3%	4.6%	4.6%	3.4%
	B	3.9%	3.9%	5.1%	0.4%	-6.2%	2.0%	3.5%	4.7%	3.6%	3.5%	3.3%	2.0%
	L	.	.	.	.	-7.6%	-2.2%	2.0%	3.6%	2.7%	2.8%	2.6%	0.5%
EU27	H	.	.	.	.	-5.5%	5.5%	5.1%	5.3%	4.2%	4.5%	4.5%	3.3%
	B	3.5%	3.5%	5.6%	0.3%	-6.7%	1.9%	3.4%	4.6%	3.5%	3.4%	3.3%	1.8%
	L	.	.	.	.	-8.2%	-2.4%	1.9%	3.5%	2.6%	2.7%	2.5%	0.3%
ESRA08	H	.	.	.	.	-5.1%	5.4%	5.2%	5.5%	4.3%	4.6%	4.6%	3.4%
	B	3.9%	3.7%	5.0%	0.4%	-6.3%	2.0%	3.6%	4.8%	3.7%	3.5%	3.4%	2.0%
	L	.	.	.	.	-7.7%	-2.2%	2.1%	3.6%	2.7%	2.9%	2.7%	0.5%
SES	H	.	.	.	.	-5.3%	5.4%	5.0%	5.2%	4.2%	4.5%	4.5%	3.3%
	B	3.4%	3.6%	4.9%	0.4%	-6.5%	1.9%	3.4%	4.5%	3.5%	3.4%	3.2%	1.8%
	L	.	.	.	.	-7.9%	-2.3%	1.9%	3.4%	2.5%	2.7%	2.5%	0.3%

Source: Airport Pair Forecast dated: 23Sep09.

ANNEX F. REFERENCES

Electronic versions of Refs 1 and 2, are available on www.eurocontrol.int/statfor.

- 1 *EUROCONTROL Short-Term Forecast: IFR Flight Movements 2009-2010*, September 2009.
- 2 *EUROCONTROL Medium-Term Forecast: IFR Flight Movements 2009-2015*, February 2009.
- 3 <http://www.eurocontrol.int/statfor>
- 4 *EUROCONTROL Glossary for Flight Statistics & Forecasts*, January 2005
- 5 *STATFOR Geographical Hierarchy*, STATFOR Doc172, February 2009

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