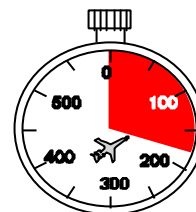
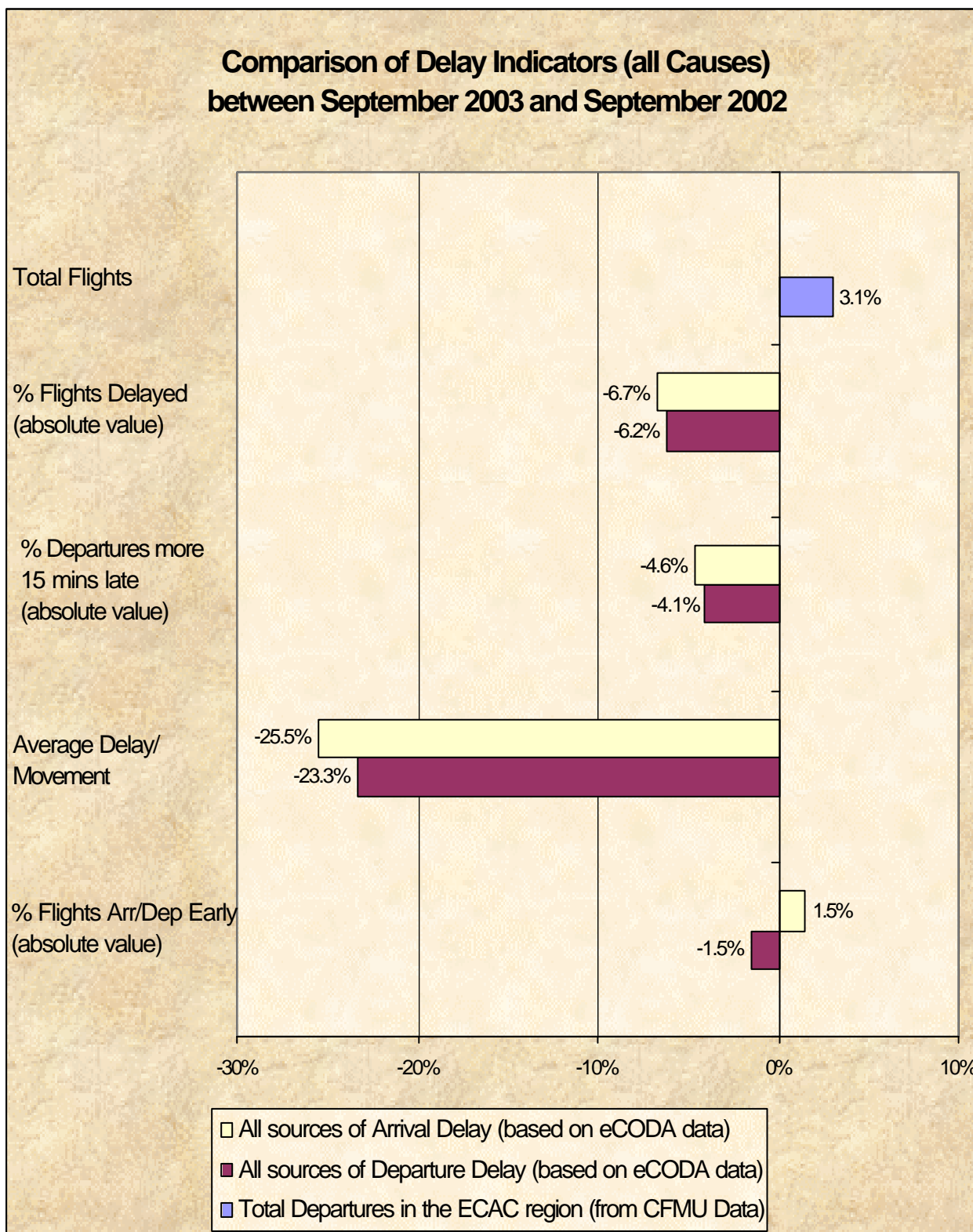


Delays to Air Transport in Europe September 2003



September 2003



FOREWORD

This report represents an overview of the delay situation in the European Civil Aviation Conference Area. It is based on delay data supplied by the CFMU, and has been prepared by the Central Office for Delay Analysis (CODA), a service of the European Air Traffic Management Programme (EATMP).

The report consists of an overview of the reporting period, a summary of the main delay effects, and a series of charts and graphics, which illustrate the main characteristics of the reporting period. However, as a result of the current form of the database, *the graphics and charts refer only to departure delays*. A glossary of terms and abbreviations used throughout the report is given in Annex 2.

In this report the definition of the CFMU ATFM departure delay is based on the difference between the scheduled off-block time and the calculated off-block time, taking into account slot time and estimated taxi time.

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SUMMARY OVERVIEW

Air traffic in September, in the ECAC region, increased by three percent on that of the same month of 2002 and was the highest September figure ever recorded. Delays, due to all causes, on the other hand, continued the decrease seen in July and August, with the Average Delay per Movement for departure traffic falling by twenty three percent and for arrivals by twenty six percent. ATFM delay also had a large decrease going down by over thirty percent.

For the first nine months of the year, traffic increased by three percent, with delayed flights, due to all causes of delay, falling by ten percent and the number of flights delayed by more than fifteen minutes falling by twelve percent. The percentage of flights arriving/departing before their scheduled time decreased slightly, with twelve percent of departures leaving early and thirty four percent of arrivals landing early. As far as the delays were concerned, the Average Delay per Movement for departures was nine minutes and for arrivals it was eleven minutes. This was a decrease of five percent for departures but a five percent increase for arrivals. Total ATFM delay fell by nineteen percent with the Average Delay per Movement falling by twenty two percent to one and three quarters minutes. A lack of ATC capacity was the main cause of delay, followed by weather, airport capacity considerations and ATC staff issues.

TRAFFIC SITUATION FOR SEPTEMBER 2003¹

Departures in the ECAC region increased by three percent to the highest ever September figure. Domestic traffic increased by just under two percent and International traffic increased by four percent. Three quarters of the busier countries (those with more than one thousand two hundred and fifty flights per month) had rises in traffic levels, with Italy, Norway and the United Kingdom having the largest real overall increase. France and the Netherlands, on the other hand, had the largest decreases. Turning to the domestic traffic, there was a large increase in Norway and decreases in Germany and France which led to both France and Germany having an overall drop in traffic.

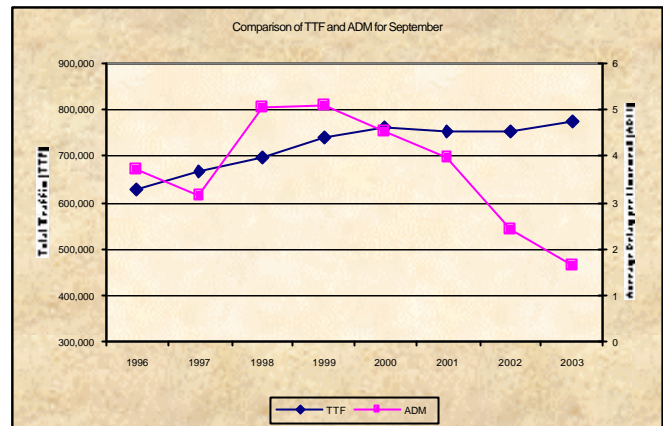
Two thirds of the busier airports (those with more than two thousand five hundred flights per month) had rises in traffic levels. The largest real increases were at Paris/Charles de Gaulle and Rome. Basle/Mulhouse, and Zurich, on the other hand, had the largest real decreases.

The busiest city pair in September was Madrid-Barcelona with over eighteen hundred flights in each direction. Milan/Linate-Rome, was the only other pair with more than one thousand flights in each direction. More than sixty percent of the busier pairs had an increase in flights, with almost a quarter of them increasing by ten percent or more. Fuerteventura-Las Palmas and Tenerife-Palma had the largest real increases, whereas London/Heathrow-Brussels had the largest decrease.

¹ The analysis was based on the CFMU database which contains details on all IFR flights in the ECAC region.

ATFM DELAY SITUATION FOR SEPTEMBER 2003

Delays due solely to ATFM measures decreased by thirty percent to the lowest September figure since CFMU operations began. Since 1966 traffic in the month of September has increased by almost twenty five percent, whereas delay during the same period has fallen by forty five percent. As in the previous two months the Average Delay per Movement also had a significant decrease, falling by thirty percent to a little over one and a half minutes. Just under half of all ATFM delay was due to a lack of ATC capacity, with ATC staff issues, airport capacity and weather being the other main causes.



Delayed flights fell by twenty percent, with the percentage of flights delayed falling by three percentage points to nine percent. This was the first time that the number of delayed flights, in September, had fallen below ten percent. Flights delayed by more than fifteen minutes decreased by over thirty percent, with flights delayed by more than sixty minutes falling by forty three percent.

Not all ATFM delay was due to ATC; thirty seven percent of all ATFM delay was caused by regulations put in place to protect airports because of lack of capacity, parking problems, low visibility, etc.. While the share of the delay was up on September last year, the actual amount of delay imposed was virtually the same. Lack of airport capacity was the main cause, with weather also making a significant contribution. Frankfurt and the Paris airports were the most affected by airport related regulations.

Based on the locations of the most penalising regulations, traffic (including overflights) using the airspace of the United Kingdom, Germany, France and Italy had the largest share of ATFM delay. Between them they accounted for almost two thirds of the ATFM delay. Compared with September last year, Germany and the Netherlands had the largest real increase, whereas the United Kingdom and Greece had the biggest decrease.

eCODA DATA

The Average Delay per Movement for departures, for all causes of delay, was eight minutes; a decrease of twenty three percent on September last year. Thirty eight percent of flights were delayed on departure, with fourteen percent of them delayed by more than fifteen minutes. This was a reduction of six percentage points in the percentage of flights delayed and four percentage points in the percentage of flights delayed by more than fifteen minutes. On the other side, twelve percent of flights departed before their scheduled time.

Arrivals also had significant decreases with the Average Delay per Movement, again for all causes, falling by twenty six percent to eight minutes, Thirty five percent of flights had an arrival delay, with fourteen percent of them delayed by more than fifteen minutes; seven percentage points down for delayed flights and five percentage points down for delays of

more than fifteen minutes. With thirty four percent of flights arriving before their scheduled time , almost as many flights arrived early as arrived late.

Of the busier airports, East Midlands, Rome and Larnaca, with an Average Delay per Movement of over sixteen minutes, due to all causes of delay, had the most affected departures². Compared with September last year, only eight airports had an increase in average delay of more than one minute, with the largest rise at East Midlands with eleven minutes. These increases were offset by large decreases at Santiago, Madrid and Malaga which all fell by over twelve minutes. In all over sixty percent of the busier airport had a decrease of one minute or more. All of the airports had a proportion of their traffic departing before their scheduled time, with over one third of departures at Mahon, Santiago, Bilbao and Leeds/Bradford leaving early.

Looking at airports as destinations shows that traffic arriving at Larnaca and East Midlands, with an Average Delay per Movement of twenty two minutes, for all causes of delay, were the most affected. Compared with September last year, eighteen percent of the busier airports had an increase in average delay, with only eight of them having an increase of one minute or more. The largest increase was at East Midlands with a rise of ten minutes. At the other end of the scale, almost seventy percent of the airports had a decrease of one minute or more, with Aberdeen falling by twenty minutes and both Alicante and Santiago falling by thirteen minutes. As with the departures all the airports had a proportion of their flights arriving before their scheduled time, with forty percent having more than a third of flights arriving early.

The most affected city pairs, due to all causes of delay, were Paris/Charles de Gaulle-Prague and Rome-Milan/Linate, with an Average Delay per Movement of twenty two minutes and twenty minutes respectively. Compared with September last year, thirty five percent of the city pairs had an increase in average delay, with twenty two percent having an increase of more than one minute. The largest increases were between London/Heathrow-Brussels, London/Heathrow-Dusseldorf, Rome-Milan/Linate and Zurich-Dusseldorf; all with a rise of more than five minutes. At the other end of the scale, over fifty percent of the pairs had a decrease of more than one minute, with the largest fall between Madrid-Alicante, down by 30 minutes, followed by Alicante-Madrid, Malaga-Melilla and Madrid-Bilbao all with a fall of twenty minutes.

An analysis of the delay causes and categories, grouped by IATA codes, shows that half of them had an increase in delay share, with the largest rises on Restrictions at Departure Airport, Damage to Aircraft & EDP Automated Equipment Failure and Technical & Aircraft Equipment categories. However, all the increases were less than one percentage point, whereas the ATFM en-Route Demand Capacity category fell by two percentage points.

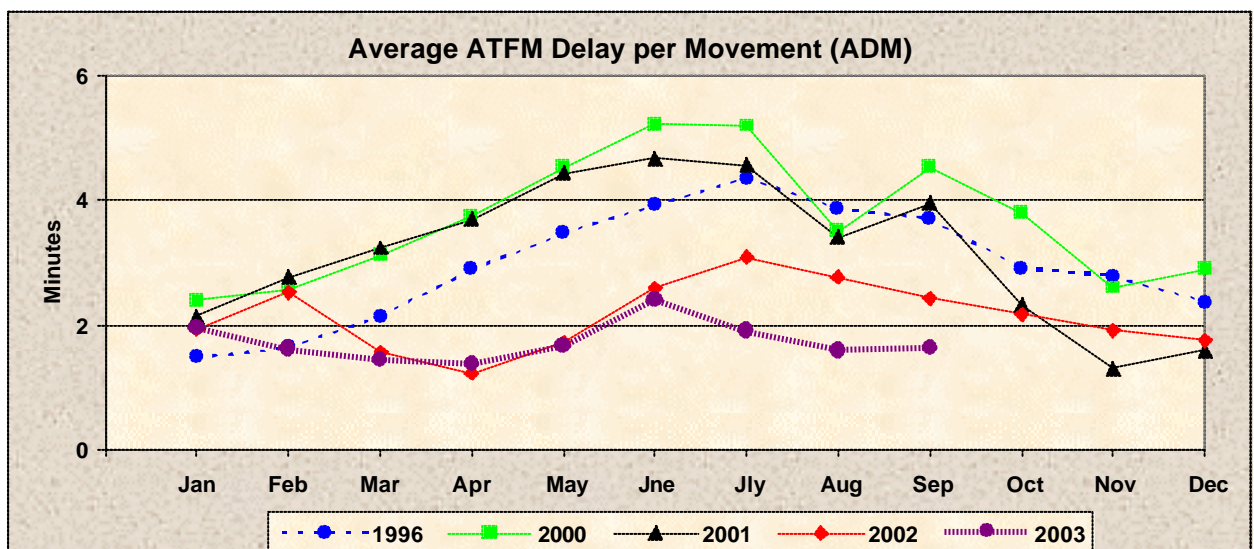
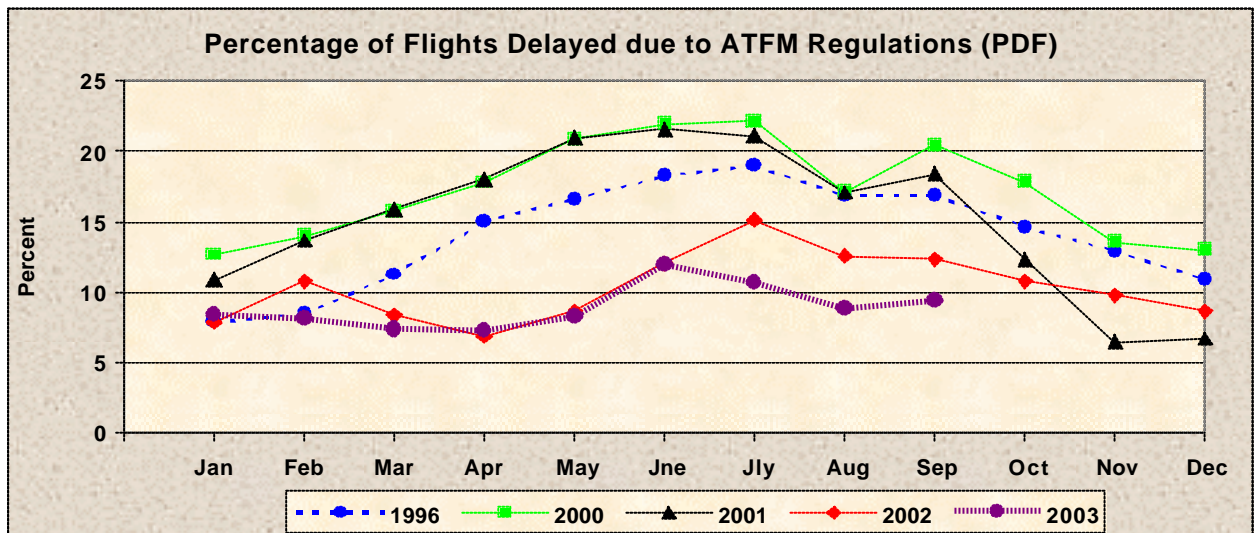
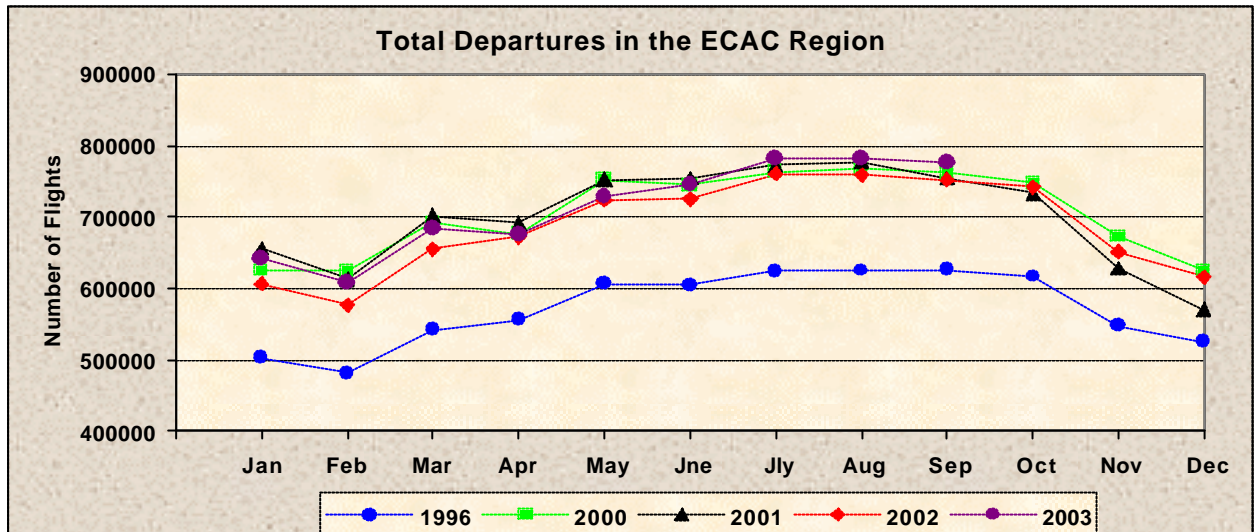
Technical and Aircraft Equipment was again the most penalising direct delay category, with eleven percent, followed by ATFM En-Route Demand/Capacity with nine percent and restrictions at Departure Airport with eight percent.

² It must be remembered that these are total delays due to flights departing/arriving at these airports and does not necessarily imply that these delays are due to action at these airports.

SUMMARY OF SIGNIFICANT EVENTS

- ✈ Weather conditions including low visibility, high winds and fog.
- ✈ Technical problems including computer problems at Bordeaux ACC; radar problems at Brest ACC and Lyon airport; power failure at Copenhagen ACC and Malmo; reduced rate at Padoua ACC due to poisonous gas in the operations room; general power failure in Italy.
- ✈ Staff issues at London ACC;
- ✈ Ibiza closed due to flooded runway; lack of runway availability at Amsterdam; bird activity at London/Heathrow; Catania closed due to a damaged runway; WIP at Kirkira/Ioannis.
- ✈ Military activity in Warsaw.
- ✈ Other items included an air show at Rome; regulations at Zurich due to environmental issues.

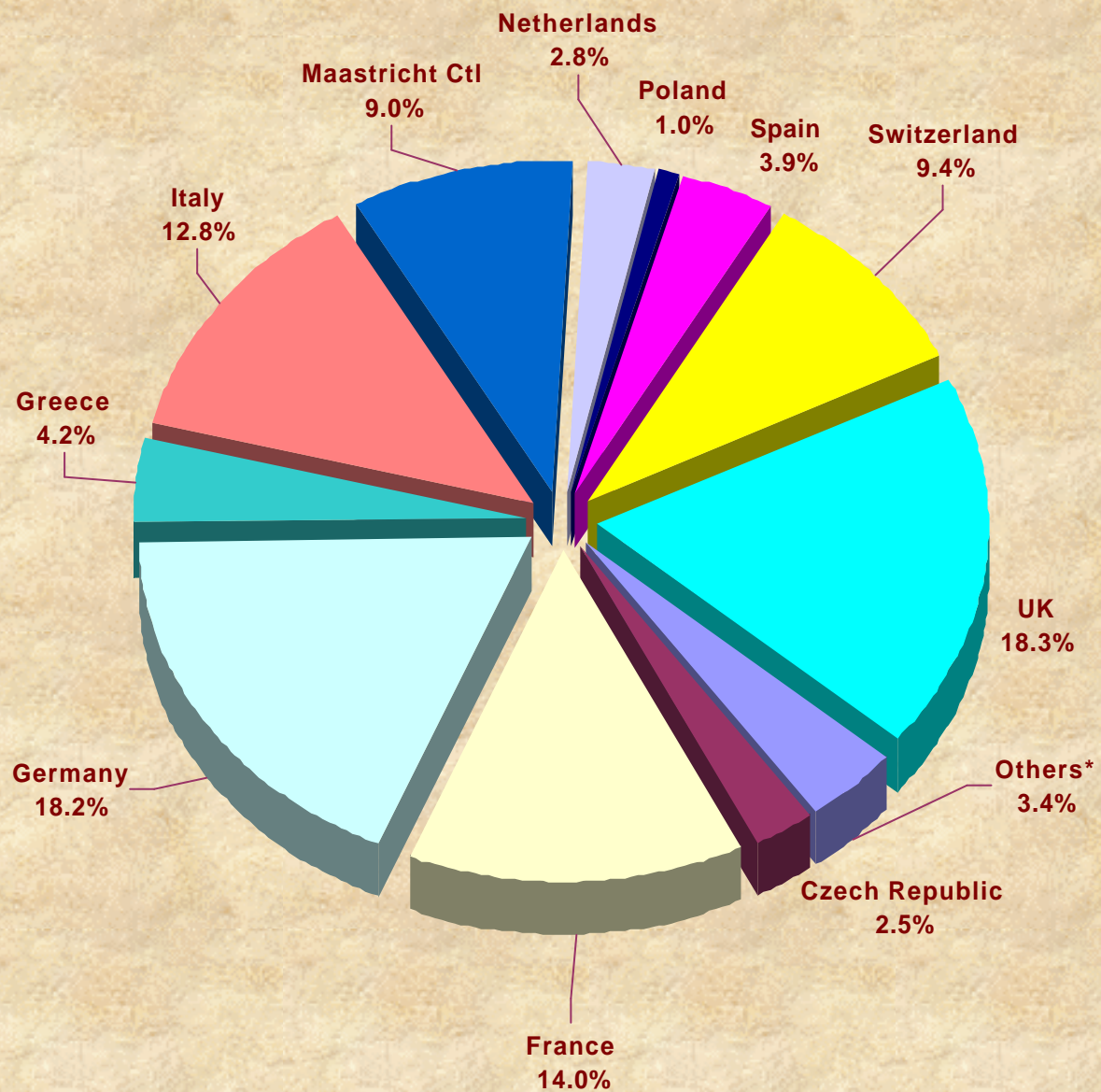
Year on Year Trends in Main Indicators



Source : CFMU ATFM Data

ATFM Delay Share as Imposed by Country based on the most penalising regulation

(Source : CFMU)



*Others = Austria, Belgium, Canary Islands, Cyprus, Denmark, Egypt, Finland, Ireland, Norway, Slovakia, Slovenia and Sweden
(The remaining countries did not cause delay)

