



## EUROCONTROL revised forecast of total service units for 2009 and 2010

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### Summary:

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This document presents the EUROCONTROL revised forecast of total service units for 2009 and 2010 based on information available as of 29 May 2009.

The total service units in the EUROCONTROL 2002 region (ESRA02) are forecast to decline by 4.4% in 2009 (vs. 2008 actual). This forecast revises upwards (+1.9%) the previous 2009 forecast issued in April 2009. This forecast is -7.1% below the States' forecast used for establishing the 2009 unit rates in November 2008.

The total service units in the EUROCONTROL 2002 region (ESRA02) are forecasted to grow by +3.1% in 2010 (vs. revised 2009 forecast)

The next service units forecasts will be issued on 30 September 2009.

## 1. INTRODUCTION

This report presents a forecast of future service units within EUROCONTROL States participating in the Multilateral Route Charges System. It provides an update of the EUROCONTROL 2009 and 2010 service units forecast down to individual charging area level. This report is based on information available as of 29 May 2009.

The raison d'être of the EUROCONTROL forecast of service units is to provide ATM stakeholders with an independent view of future changes in service units within EUROCONTROL charging areas. This is aimed at helping States to establish unit rates for route charges and informing consultations of stakeholders.

Section 2 describes the forecasting methodology. Section 3 presents the evolution of the situation to date. Section 4 highlights the main forecast results. Two tables attached at Annex present the forecasts for all States participating in the Multilateral Route Charges System.

## 2. EUROCONTROL FORECASTING METHODOLOGY

The forecasting methodology is based largely on time series analysis. For this update, for the first time, the time series analysis included the EUROCONTROL flight forecast.<sup>1</sup> The revised 2009 and 2010 forecasts have been computed using monthly data of **total** actual service units recorded in the route charges system from January 1990 (or first month of operation in the route charges system) up to and including **April 2009**. It is therefore a 20-month ahead forecast.

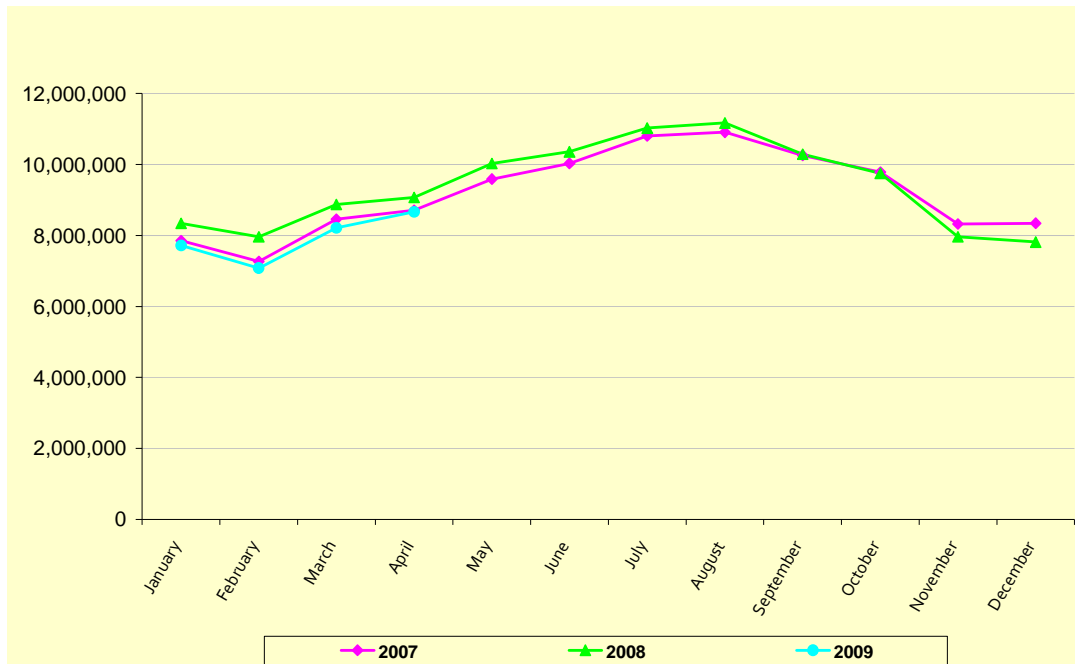
## 3. MONITORING THE SITUATION TO DATE (2008 AND APRIL 2009)

The total service units recorded in the ESRA02 Area<sup>2</sup> during the full year 2008 were some **+2.1%** higher than in 2007. The first four months of 2009 had 7.5% fewer service units than the same period of 2008. **Figure 1** presents the monthly total service units in the ESRA02 Area from 2007 to latest available month.

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<sup>1</sup> Growth rates of service units and flights are typically different, but correlated. For States where that correlation contributes statistically to a better forecast, the flight forecast influences future growth in service units. Since the flight forecast is influenced by factors such as economic growth, the service unit forecast will also be influenced by economic growth forecasts.

<sup>2</sup> The "Eurocontrol 2002 Charging Area" is composed of 30 individual charging areas: Belgium-Luxembourg, Germany, France, U.K., the Netherlands, Ireland, Switzerland, Portugal Lisboa, Austria, Spain Continental, Spain-Canaries, Portugal-Santa Maria, Greece, Turkey, Malta, Cyprus, Hungary, Norway, Denmark, Slovenia, Czech Republic, Sweden, Italy, Slovak Republic, Romania, Croatia, Bulgaria, FYROM, Moldova, Finland. It is also referred to as the ESRA 02 (EUROCONTROL Statistical Reference Area 2002).

**Figure 1: Actual total service units recorded in the ESRA02 charging area in 2007-2009**

#### 4. FORECAST RESULTS

Figure 2 presents the 2009 and 2010 forecasts of total service units. These are forecasted to decline by 4.4% in 2009 (vs. 2008 actual) and to grow by 3.1% in 2010 in the EUROCONTROL 2002 Charging Area or ESRA02.

Three charging regions have been added to the forecast: Serbia-Montenegro, Poland and Lithuania. The forecasts for these regions must be treated as less certain than for longer-established regions, because they are based on a very limited set of historical data. These new regions *are not* included in the aggregated zones CRCO88, ESRA02 but *are* included in the TOTAL.

Armenia has been recently integrated in the CRCO system. A service unit forecast will be produced for this state as soon as possible.

Overall, this updated forecast for 2009 (107.7 million SU – ESRA02) is 7.1% lower than those established at the end of 2008 (116 million SU – ESRA02 - States' 2009 total service units forecast presented at the November 2008 session of the enlarged Committee).

This new forecast is 1.9% above the previous one published by the CRCO in April 2009 (105.6 million SU – ESRA02). Nevertheless, this new forecast is 2.3% below the 2007 actual figure (110.3 million SU – ESRA02).

The average medium term growth foreseen in 2007 within the SESAR was at about +4.5% per year until 2020. Assuming a yearly growth of +4.5% since 2007, the traffic in 2009 would have been 120.5 million SU for ESRA02 States. The new forecast for 2009 is 10.6% below this level. This is a smaller downturn than that seen in flights, where about 4 years growth is forecasted to be lost.

There is significant uncertainty, particularly in the 2010 forecast. Although there are now economic indications that the downturn has reached a low point, these are mixed. There have also been announcements of further cuts in capacity by European airlines for the winter 2009/2010 timetable. Implicit in the forecast for many regions is a recovery at the end of 2009, but this recovery may arrive 3-6 months later. At the same time, few economists expect strong or even average growth in 2010. So the risks for 2010 are largely down-side risks.

**Figure 3** presents the breakdown of the 2009 and 2010 forecast into chargeable and exempted service units, estimated on the basis of the proportions observed in 2008.

## A. 2009-2010 Total Service Units' Forecast

Figure 2. 2009-2010 Total service units' forecasts (SUF – May 2009)

Charging Areas		2008 Actual Total Service Units	CRCO 2009 Forecast Total Service Units	2009/2008	CRCO 2010 Forecast Total Service Units	2010/2009	States 2009 forecast Total Service units (Nov. 2008)*	CRCO May 2009 / States Nov. 2008
EB	Belgique/Belgium-Luxembourg	2,220,106	2,087,285	-6.0%	2,174,817	4.2%	2,292,700	-9.0%
ED	Allemagne/Germany	12,749,260	12,042,626	-5.5%	12,457,785	3.4%	12,650,000	-4.8%
LF	France	18,034,193	16,998,079	-5.7%	17,760,760	4.5%	18,469,073	-8.0%
EG	R.U./U.K.	11,043,630	10,159,929	-8.0%	10,451,957	2.9%	10,814,780	-6.1%
EH	Pays-Bas/Netherlands	2,621,275	2,466,126	-5.9%	2,531,953	2.7%	2,682,000	-8.0%
EI	Irlande/Ireland	3,823,471	3,550,700	-7.1%	3,587,685	1.0%	3,982,400	-10.8%
LS	Suisse/Switzerland	1,471,851	1,390,200	-5.5%	1,436,674	3.3%	1,521,347	-8.6%
LP	Portugal Lisboa	2,676,891	2,490,801	-7.0%	2,500,510	0.4%	2,771,686	-10.1%
LO	Autriche/Austria	2,565,596	2,445,115	-4.7%	2,477,039	1.3%	2,610,000	-6.3%
LE	Espagne/Spain - Continental	9,128,844	8,395,985	-8.0%	8,721,806	3.9%	10,287,276	-18.4%
GC	Espagne/Spain - Canarias	1,713,085	1,507,126	-12.0%	1,543,059	2.4%	1,957,211	-23.0%
AZ	Portugal Santa Maria	3,483,618	3,542,211	1.7%	3,673,221	3.7%	3,480,229	1.8%
LG	Grèce/Greece	4,258,001	4,290,468	0.8%	4,557,895	6.2%	4,257,305	0.8%
LT	Turquie/Turkey	7,628,625	7,962,017	4.4%	8,175,844	2.7%	8,102,500	-1.7%
LM	Malte/Malta	421,760	401,164	-4.9%	423,237	5.5%	426,700	-6.0%
LI	Italie/Italy	8,660,349	8,273,853	-4.5%	8,450,157	2.1%	9,066,971	-8.7%
LC	Chypre/Cyprus	1,310,890	1,271,449	-3.0%	1,309,980	3.0%	1,357,700	-6.4%
LH	Hongrie/Hungary	2,092,142	2,067,649	-1.2%	2,073,082	0.3%	2,133,000	-3.1%
EN	Norvège/Norway	1,537,052	1,482,250	-3.6%	1,521,151	2.6%	1,562,000	-5.1%
EK	Danemark/Denmark	1,474,287	1,372,114	-6.9%	1,389,827	1.3%	1,557,800	-11.9%
LJ	Slovénie/Slovenia	341,546	332,606	-2.6%	337,883	1.6%	345,148	-3.6%
LR	Roumanie/Romania	3,240,107	3,178,324	-1.9%	3,260,664	2.6%	3,200,300	-0.7%
LK	Rép. Tchèqe/Czech Rep.	2,019,121	2,018,695	0.0%	2,045,437	1.3%	2,100,000	-3.9%
ES	Suède/Sweden	3,271,474	2,914,101	-10.9%	2,876,250	-1.3%	3,433,052	-15.1%
LZ	Slovaquie/Slovak Republic	762,261	763,147	0.1%	789,301	3.4%	803,000	-5.0%
LD	Croatie/Croatia	1,270,788	1,321,885	4.0%	1,395,714	5.6%	1,272,000	3.9%
LB	Bulgarie/Bulgaria	1,746,648	1,861,501	6.6%	1,939,349	4.2%	1,669,815	11.5%
LW	ARYM/FYROM	182,055	185,542	1.9%	194,685	4.9%	196,000	-5.3%
LU	Moldavie/Moldova	115,284	125,623	9.0%	137,917	9.8%	131,414	-4.4%
EF	Finlande/Finland	790,805	750,275	-5.1%	767,648	2.3%	787,800	-4.8%
LA	Albanie/Albania	324,951	336,809	3.6%	363,498	7.9%	321,000	4.9%
LQ	Bosnie-Herz./Bosnia and Herzegovina	524,687	536,389	2.2%	578,308	7.8%	539,400	-0.6%
LY	Serbie&Mont./Serbia&Montenegro	1,747,513	1,829,655	4.7%	1,949,759	6.6%	1,883,210	-2.8%
EP	Pologne/Poland	3,229,758	3,045,886	-5.7%	3,096,806	1.7%	3,807,875	-20.0%
EY	Lituanie/Lithuania	383,561	343,809	-10.4%	363,650	5.8%	412,200	-16.6%
<b>CRCO 88</b>		<b>71,531,820</b>	<b>67,076,183</b>	<b>-6.2%</b>	<b>69,317,266</b>	<b>3.3%</b>	<b>73,518,702</b>	<b>-8.8%</b>
<b>ESRA 02</b>		<b>112,655,015</b>	<b>107,648,846</b>	<b>-4.4%</b>	<b>110,963,287</b>	<b>3.1%</b>	<b>115,921,207</b>	<b>-7.1%</b>
<b>TOTAL</b>		<b>118,865,485</b>	<b>113,741,394</b>	<b>-4.3%</b>	<b>117,315,308</b>	<b>3.1%</b>	<b>122,884,892</b>	<b>-7.4%</b>

\* Total Service Units as presented in Table 1 : "Cost - Base and National Unit Rate : 2009 Forecast Account" presented at the November 2008 session of the enlarged Committee

## B. 2009-2010 Chargeable Service Units' forecasts

Figure 3: Chargeable service units' forecasts (SUF – May 2009)

Charging Areas		CRCO 2009 Forecast Total Service Units	CRCO 2010 Forecast Total Service Units	2008 Actual Exempted SU in %	2008 Actual Chargeable SU in %	2009 Chargeable SU Estimate*	2010 Chargeable SU Estimate*
EB	Belgique/Belgium-Luxembourg	2,087,285	2,174,817	1.6%	98.4%	2,053,600	2,139,700
ED	Allemagne/Germany	12,042,626	12,457,785	1.1%	98.9%	11,910,300	12,320,900
LF	France	16,998,079	17,760,760	1.1%	98.9%	16,808,600	17,562,700
EG	R.U./U.K.	10,159,929	10,451,957	1.5%	98.5%	10,010,700	10,298,500
EH	Pays-Bas/Netherlands	2,466,126	2,531,953	1.0%	99.0%	2,441,500	2,506,700
EI	Irlande/Ireland	3,550,700	3,587,685	1.8%	98.2%	3,485,800	3,522,100
LS	Suisse/Switzerland	1,390,200	1,436,674	0.3%	99.7%	1,386,000	1,432,400
LP	Portugal Lisboa	2,490,801	2,500,510	1.7%	98.3%	2,449,100	2,458,600
LO	Autriche/Austria	2,445,115	2,477,039	0.3%	99.7%	2,437,900	2,469,800
LE	Espagne/Spain - Continental	8,395,985	8,721,806	1.3%	98.7%	8,286,300	8,607,800
GC	Espagne/Spain - Canarias	1,507,126	1,543,059	0.9%	99.1%	1,493,100	1,528,700
AZ	Portugal Santa Maria	3,542,211	3,673,221	3.5%	96.5%	3,418,900	3,545,300
LG	Grèce/Greece	4,290,468	4,557,895	2.6%	97.4%	4,178,200	4,438,600
LT	Turquie/Turkey	7,962,017	8,175,844	3.5%	96.5%	7,682,600	7,888,900
LM	Malte/Malta	401,164	423,237	4.5%	95.5%	383,200	404,300
LI	Italie/Italy	8,273,853	8,450,157	2.5%	97.5%	8,063,200	8,235,000
LC	Chypre/Cyprus	1,271,449	1,309,980	1.2%	98.8%	1,255,900	1,294,000
LH	Hongrie/Hungary	2,067,649	2,073,082	2.1%	97.9%	2,025,000	2,030,300
EN	Norvège/Norway	1,482,250	1,521,151	1.0%	99.0%	1,467,600	1,506,100
EK	Danemark/Denmark	1,372,114	1,389,827	0.6%	99.4%	1,363,200	1,380,800
LJ	Slovénie/Slovenia	332,606	337,883	0.6%	99.4%	330,500	335,700
LR	Roumanie/Romania	3,178,324	3,260,664	3.2%	96.8%	3,075,600	3,155,300
LK	Rép. Tchèque/Czech Rep.	2,018,695	2,045,437	3.5%	96.5%	1,947,900	1,973,700
ES	Suède/Sweden	2,914,101	2,876,250	0.3%	99.7%	2,905,900	2,868,100
LZ	Slovaquie/Slovak Republic	763,147	789,301	1.9%	98.1%	748,500	774,200
LD	Croatie/Croatia	1,321,885	1,395,714	0.5%	99.5%	1,315,200	1,388,700
LB	Bulgarie/Bulgaria	1,861,501	1,939,349	0.8%	99.2%	1,846,200	1,923,400
LW	ARYM/FYROM	185,542	194,685	0.3%	99.7%	185,000	194,100
LU	Moldavie/Moldova	125,623	137,917	0.2%	99.8%	125,400	137,600
EF	Finlande/Finland	750,275	767,648	1.0%	99.0%	743,100	760,300
LA	Albanie/Albania	336,809	363,498	1.0%	99.0%	333,600	360,000
LQ	Bosnie-Herz./Bosnia and Herzegovina	536,389	578,308	0.1%	99.9%	535,600	577,500
LY	Serbie&Mont./Serbia&Montenegro	1,829,655	1,949,759	0.1%	99.9%	1,827,900	1,947,900
EP	Pologne/Poland	3,045,886	3,096,806	0.6%	99.4%	3,028,400	3,079,100
EY	Lituanie/Lithuania	343,809	363,650	0.4%	99.6%	342,400	362,100
<b>CRCO 88</b>		<b>67,076,183</b>	<b>69,317,266</b>	<b>1.3%</b>	<b>98.7%</b>	<b>66,181,800</b>	<b>68,393,200</b>
<b>ESRA 02</b>		<b>107,648,846</b>	<b>110,963,287</b>	<b>1.7%</b>	<b>98.3%</b>	<b>105,824,000</b>	<b>109,082,300</b>
<b>TOTAL</b>		<b>113,741,394</b>	<b>117,315,308</b>	<b>1.6%</b>	<b>98.4%</b>	<b>111,891,900</b>	<b>115,408,900</b>

\* Estimate based on the proportions of chargeable and exempted service units observed in 2008

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