



EUROCONTROL Service Unit Forecast: December '09 Revision

Summary:

This document presents the EUROCONTROL revised forecast of total service units for 2009 and 2010 based on information available as of 18 December 2009.

The total service units in the EUROCONTROL 2002 region (ESRA02) are forecast to decline by 5.3% in 2009 (vs. 2008 actual). This forecast revises downwards (-0.4%) the previous 2009 forecast issued in September 2009. This forecast is in total 8% 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 forecast to grow by +2.6% in 2010 (vs. revised 2009 forecast)

The next forecast of service units, covering 2010 and 2011, will be issued on 24 February 2010.

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 18 December 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

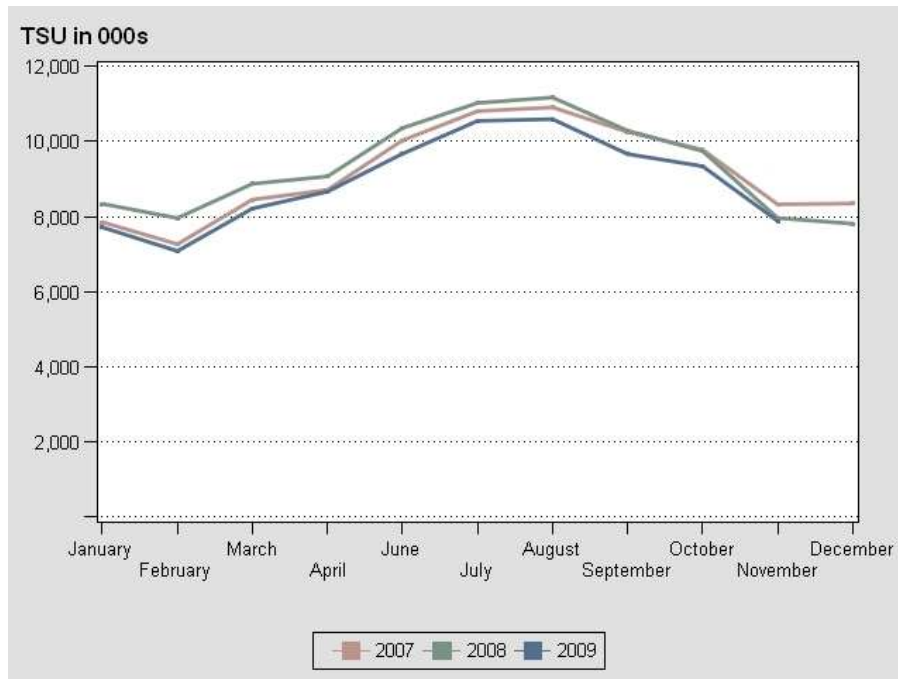
The forecasting methodology is based largely on time series analysis. From May 2009 onwards, the time series analysis included the EUROCONTROL flight and overflight forecast¹. The revised 2009 and 2010 forecasts have been computed using monthly data of **total** actual service units recorded in the route charges system from January 1990 (or first month of operation in the route charges system) up to and including **November 2009**. It is therefore a 13-month ahead forecast.

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

The total service units recorded in the ESRA02 Area² during the full year 2008 were some **+2.1%** higher than in 2007. The first eleven months of 2009 had 5.8% 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. It shows how the total service units in November 2009 were close to those of 2008, after being below 2008 for most of the year.

¹ 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.

² 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, and Finland. It is also referred to as the ESRA02 (EUROCONTROL Statistical Reference Area 2002).

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

4. FORECAST RESULTS

Figure 2 presents the 2009 and 2010 forecasts of total service units prepared by STATFOR on behalf of CRCO. These are forecast to decline by 5.3% in 2009 (vs. 2008 actual) and to grow by 2.6% in 2010 in the EUROCONTROL 2002 Charging Area or ESRA02.

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

Overall, this updated forecast for 2009 (106.7 million service units – ESRA02) is 8% 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 Committee³). This new forecast is 0.4% below the previous one prepared by STATFOR in September 2009 (107.2 million service units – ESRA02). This new forecast is also 3.3% below the 2007 actual figure (110.3 million service units – ESRA02).

There is significant uncertainty, particularly in the 2010 forecast. In one hand, the traffic recovery for busiest States (e.g France, UK) is happening at a slower pace than expected. Furthermore the economic forecast for these States remains weak for next year. So the risks for 2010 are mostly downside for these States. On the other hand, some smaller States like Greece and FYROM show recovery in flights late in December. As this is not included in the forecast input yet, a further upward revision could be possible for these States next year.

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.

³ Available on OneSky Teams, see 85th Enlarged Committee document CER-85-2008-3211/FIN.

A. Forecast of total service units in 2009 and 2010

Figure 2. 2009-2010 Forecast of total service units (SUF – December 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 Dec. 2009 / States Nov. 2008
EB Belgique/Belgium-Luxembourg	2,220,106	2,082,552	-6.2%	2,156,470	3.5%	2,292,700	-9.2%
ED Allemagne/Germany	12,749,260	11,918,557	-6.5%	12,467,434	4.6%	12,650,000	-5.8%
LF France	18,034,193	16,824,355	-6.7%	17,061,567	1.4%	18,469,073	-8.9%
EG R.U./U.K.	11,043,630	9,946,525	-9.9%	10,101,759	1.6%	10,814,780	-8.0%
EH Pays-Bas/Netherlands	2,621,275	2,424,854	-7.5%	2,437,964	0.5%	2,682,000	-9.6%
EI Irlande/Ireland	3,823,471	3,550,862	-7.1%	3,541,525	-0.3%	3,982,400	-10.8%
LS Suisse/Switzerland	1,471,851	1,399,923	-4.9%	1,423,295	1.7%	1,521,347	-8.0%
LP Portugal Lisboa	2,676,891	2,504,275	-6.4%	2,575,858	2.9%	2,771,686	-9.6%
LO Autriche/Austria	2,565,596	2,423,019	-5.6%	2,473,602	2.1%	2,610,000	-7.2%
LE Espagne/Spain - Continental	9,128,844	8,369,939	-8.3%	8,627,935	3.1%	10,287,276	-18.6%
GC Espagne/Spain - Canarias	1,713,085	1,497,735	-12.6%	1,551,178	3.6%	1,957,211	-23.5%
AZ Portugal Santa Maria	3,483,618	3,497,297	0.4%	3,628,605	3.8%	3,480,229	0.5%
LG Grèce/Greece	4,258,001	4,138,559	-2.8%	4,410,925	6.6%	4,257,305	-2.8%
LT Turquie/Turkey	7,628,625	8,074,787	5.8%	8,490,232	5.1%	8,102,500	-0.3%
LM Malte/Malta	421,760	414,063	-1.8%	431,990	4.3%	426,700	-3.0%
LI Italie/Italy	8,660,349	8,156,562	-5.8%	8,344,076	2.3%	9,066,971	-10.0%
LC Chypre/Cyprus	1,310,890	1,273,594	-2.8%	1,335,547	4.9%	1,357,700	-6.2%
LH Hongrie/Hungary	2,092,142	2,039,075	-2.5%	2,014,941	-1.2%	2,133,000	-4.4%
EN Norvège/Norway	1,537,052	1,496,813	-2.6%	1,497,016	0.0%	1,562,000	-4.2%
EK Danemark/Denmark	1,474,287	1,359,176	-7.8%	1,395,124	2.6%	1,557,800	-12.8%
LJ Slovénie/Slovenia	341,546	328,851	-3.7%	330,691	0.6%	345,148	-4.7%
LR Roumanie/Romania	3,240,107	3,137,287	-3.2%	3,147,103	0.3%	3,200,300	-2.0%
LK Rép. Tchèque/Czech Rep.	2,019,121	2,021,433	0.1%	2,065,766	2.2%	2,100,000	-3.7%
ES Suède/Sweden	3,271,474	2,908,597	-11.1%	2,845,387	-2.2%	3,433,052	-15.3%
LZ Slovaquie/Slovak Republic	762,261	769,509	1.0%	794,629	3.3%	803,000	-4.2%
LD Croatie/Croatia	1,270,788	1,300,515	2.3%	1,378,228	6.0%	1,272,000	2.2%
LB Bulgarie/Bulgaria	1,746,648	1,795,357	2.8%	1,858,017	3.5%	1,669,815	7.5%
LW ARYM/FYROM	182,055	179,805	-1.2%	180,928	0.6%	196,000	-8.3%
LU Moldavie/Moldova	115,284	138,506	20.1%	156,554	13.0%	131,414	5.4%
EF Finlande/Finland	790,805	729,970	-7.7%	743,663	1.9%	787,800	-7.3%
LA Albanie/Albania	324,951	355,468	9.4%	371,310	4.5%	321,000	10.7%
LQ Bosnie-Herz./Bosnia and Herzegovina	524,687	579,855	10.5%	625,157	7.8%	539,400	7.5%
LY Serbie-Mont./Serbia-Montenegro	1,747,513	1,784,459	2.1%	1,859,041	4.2%	1,883,210	-5.2%
EP Pologne/Poland	3,229,758	3,078,717	-4.7%	3,218,937	4.6%	3,807,875	-19.1%
EY Lituanie/Lithuania	383,561	341,868	-10.9%	360,911	5.6%	412,200	-17.1%
CRCO 88	71,531,820	66,439,893	-7.1%	68,047,192	2.4%	73,518,702	-9.6%
ESRA 02	112,655,015	106,702,352	-5.3%	109,468,009	2.6%	115,921,207	-8.0%
TOTAL	118,865,485	112,842,719	-5.1%	115,903,365	2.7%	122,884,892	-8.2%

* Total Service Units as presented in Table 3: "Cost - Base and National Unit Rate: 2009 Forecast Account" extracted from Enlarged Committee document CER-85-2008-3211.

B. Forecast of chargeable service units in 2009 and 2010

Figure 3: Forecast of chargeable service units (SUF – December 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	2,082,552	2,156,470	1.6%	98.4%	2,048,900	2,121,600
ED	Allemagne/Germany	11,918,557	12,467,434	1.1%	98.9%	11,787,600	12,330,500
LF	France	16,824,355	17,061,567	1.1%	98.9%	16,636,800	16,871,300
EG	R.U./U.K.	9,946,525	10,101,759	1.5%	98.5%	9,800,500	9,953,400
EH	Pays-Bas/Netherlands	2,424,854	2,437,964	1.0%	99.0%	2,400,700	2,413,600
EI	Irlande/Ireland	3,550,862	3,541,525	1.8%	98.2%	3,486,000	3,476,800
LS	Suisse/Switzerland	1,399,923	1,423,295	0.3%	99.7%	1,395,700	1,419,000
LP	Portugal Lisboa	2,504,275	2,575,858	1.7%	98.3%	2,462,300	2,532,700
LO	Autriche/Austria	2,423,019	2,473,602	0.3%	99.7%	2,415,900	2,466,300
LE	Espagne/Spain - Continental	8,369,939	8,627,935	1.3%	98.7%	8,260,600	8,515,200
GC	Espagne/Spain - Canarias	1,497,735	1,551,178	0.9%	99.1%	1,483,800	1,536,800
AZ	Portugal Santa Maria	3,497,297	3,628,605	3.5%	96.5%	3,375,500	3,502,300
LG	Grèce/Greece	4,138,559	4,410,925	2.6%	97.4%	4,030,300	4,295,500
LT	Turquie/Turkey	8,074,787	8,490,232	3.5%	96.5%	7,791,400	8,192,300
LM	Malte/Malta	414,063	431,990	4.5%	95.5%	395,500	412,700
LI	Italie/Italy	8,156,562	8,344,076	2.5%	97.5%	7,948,900	8,131,600
LC	Chypre/Cyprus	1,273,594	1,335,547	1.2%	98.8%	1,258,000	1,319,200
LH	Hongrie/Hungary	2,039,075	2,014,941	2.1%	97.9%	1,997,000	1,973,400
EN	Norvège/Norway	1,496,813	1,497,016	1.0%	99.0%	1,482,000	1,482,200
EK	Danemark/Denmark	1,359,176	1,395,124	0.6%	99.4%	1,350,300	1,386,100
LJ	Slovénie/Slovenia	328,851	330,691	0.6%	99.4%	326,700	328,600
LR	Roumanie/Romania	3,137,287	3,147,103	3.2%	96.8%	3,035,900	3,045,400
LK	Rép. Tchèque/Czech Rep.	2,021,433	2,065,766	3.5%	96.5%	1,950,600	1,993,400
ES	Suède/Sweden	2,908,597	2,845,387	0.3%	99.7%	2,900,400	2,837,300
LZ	Slovaquie/Slovak Republic	769,509	794,629	1.9%	98.1%	754,800	779,400
LD	Croatie/Croatia	1,300,515	1,378,228	0.5%	99.5%	1,293,900	1,371,300
LB	Bulgarie/Bulgaria	1,795,357	1,858,017	0.8%	99.2%	1,780,600	1,842,800
LW	ARYM/FYROM	179,805	180,928	0.3%	99.7%	179,200	180,400
LU	Moldavie/Moldova	138,506	156,554	0.2%	99.8%	138,200	156,200
EF	Finlande/Finland	729,970	743,663	1.0%	99.0%	723,000	736,600
LA	Albanie/Albania	355,468	371,310	1.0%	99.0%	352,000	367,700
LQ	Bosnie-Herz./Bosnia and Herzegovina	579,855	625,157	0.1%	99.9%	579,000	624,300
LY	Serbie-Mont./Serbia-Montenegro	1,784,459	1,859,041	0.1%	99.9%	1,782,800	1,857,300
EP	Pologne/Poland	3,078,717	3,218,937	0.6%	99.4%	3,061,100	3,200,500
EY	Lituanie/Lithuania	341,868	360,911	0.4%	99.6%	340,400	359,400
	CRCO 88	66,439,893	68,047,192	1.3%	98.7%	65,554,300	67,139,500
	ESRA 02	106,702,352	109,468,009	1.7%	98.3%	104,891,000	107,603,900
	TOTAL	112,842,719	115,903,365	1.6%	98.4%	111,006,300	114,013,100

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

© European Organisation for the Safety of Air Navigation (EUROCONTROL) 2009

This document is published by EUROCONTROL in the interests of exchange of information. It may be copied in whole or in part, providing that the copyright notice and disclaimer are included. The information contained in this document may not be modified without prior written permission from EUROCONTROL.

EUROCONTROL makes no warranty, either implied or express, for the information contained in this document, neither does it assume any legal liability or responsibility for the accuracy, completeness or usefulness of this information.

For further information please contact,

STATFOR, the EUROCONTROL Statistics and Forecast Service

statfor.info@eurocontrol.int

<http://www.eurocontrol.int/statfor>