



DGCA MEETING

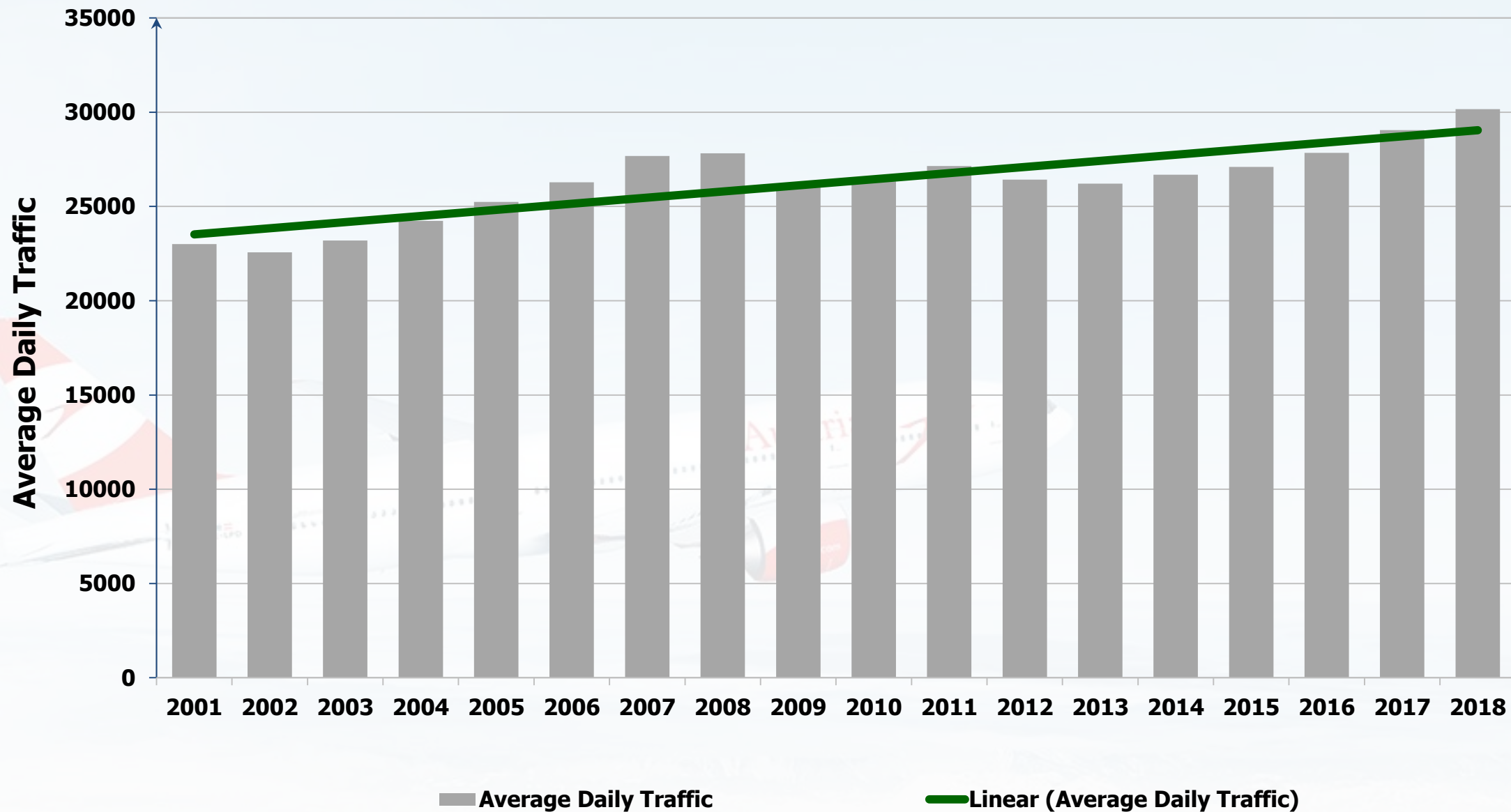
**ICAO EURNAT
DGCA/2019**



**Eamonn Brennan
Director General
20 March 2019**



European Air traffic 2001-18 (Avg. Daily Traffic)



2018 Results – Air Traffic

CO₂
Emissions
+5.2%



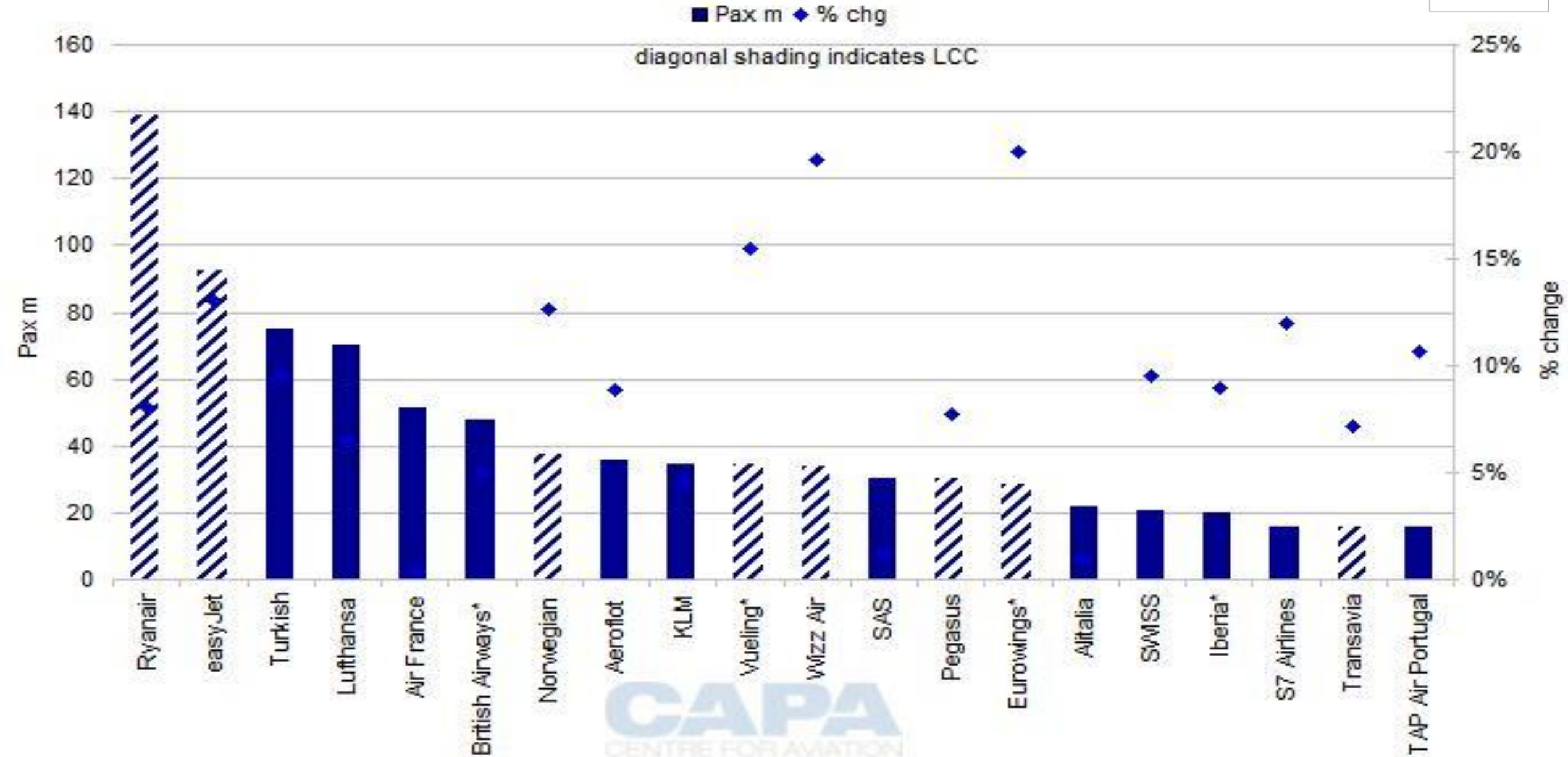
11 Million
Flights
+3.8%

30,168
Average
Traffic
p/day

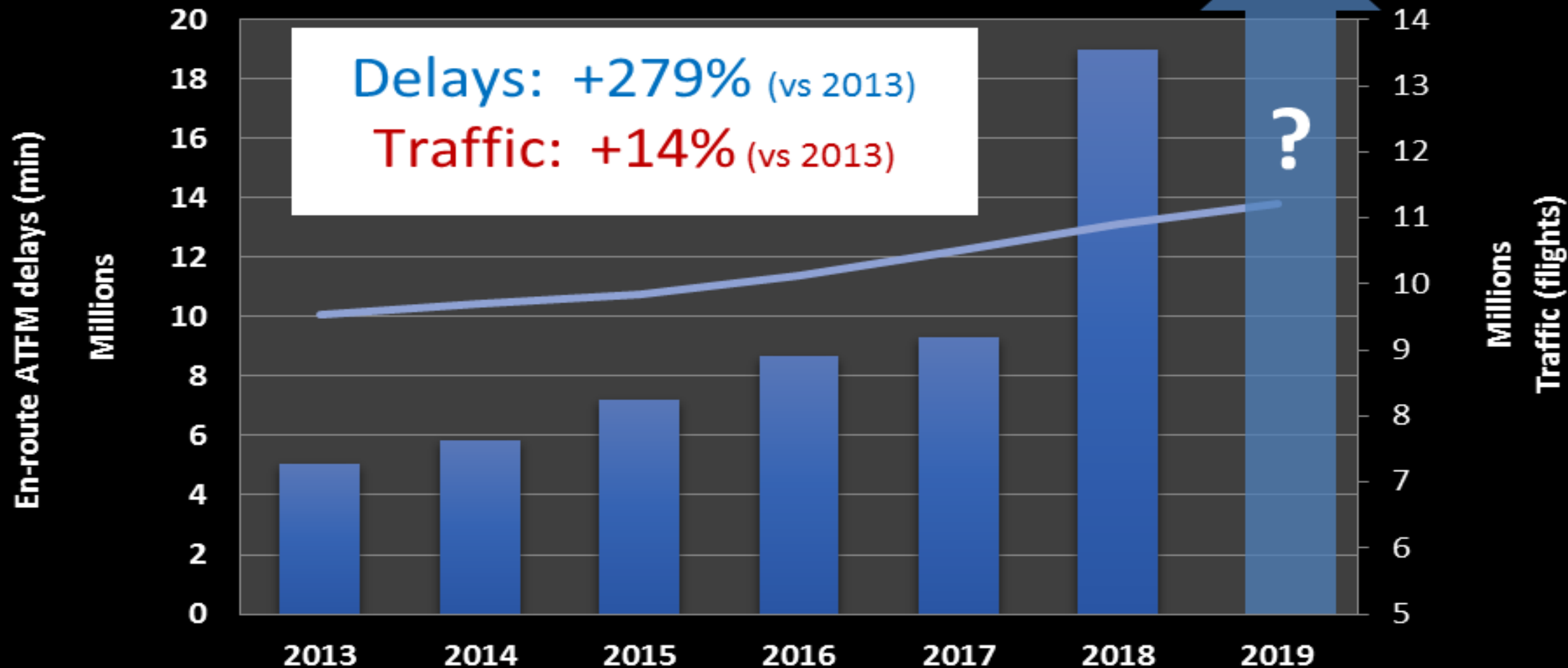
Busiest Day
37,101
Flights on 7
Sept.

19 Days
over
36,000
flights
(none in 2017)

Individual Airline Rankings 2018



European Network Traffic and en-route ATFM delays (EUROCONTROL Member States)



2018 All-Causes

Delay and Operational cancellations

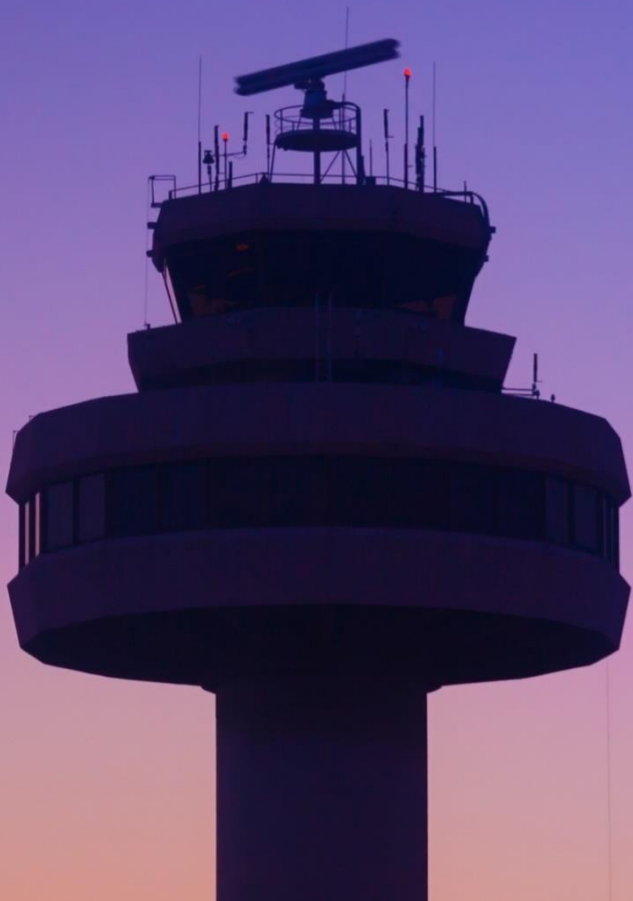
**% of flights
with
departure
delay >15
minutes**

26%

**Average
Delay Per
Delayed
Flight >15
minutes**

49 mins

Myriad of challenges



Fragmentation of **ATM - Delays**

Capping **emissions**

U-Space integration

Preserving **competition**

Passenger Rights – EU261

Airport/Runway expansion

Social Pillar

Civil-**Military**

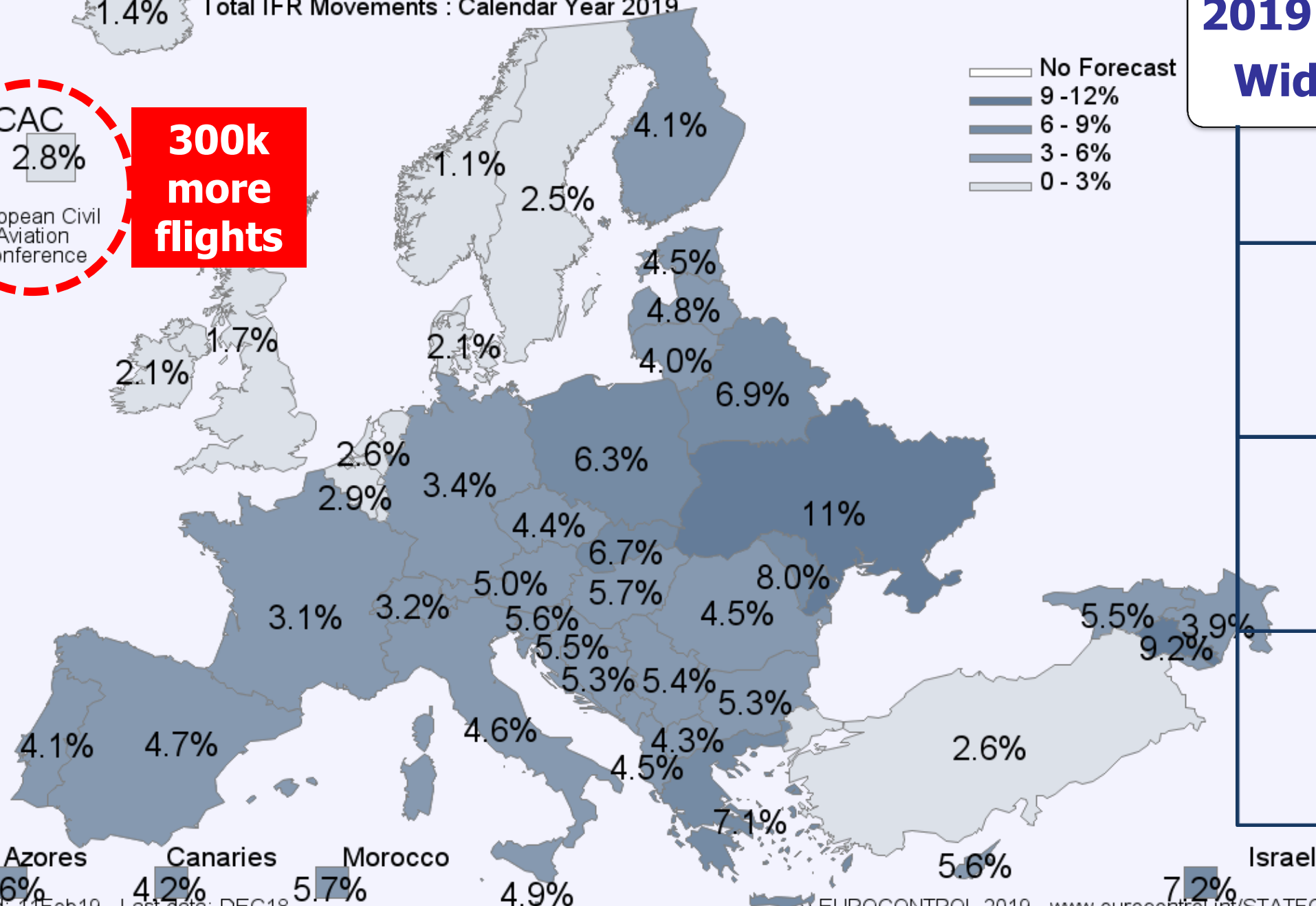
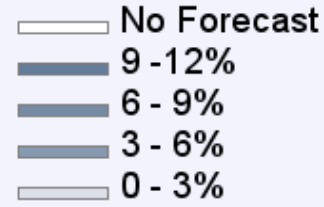
EUROCONTROL Forecast

Total IFR Movements : Calendar Year 2019

2019 Traffic Forecast Wider Uncertainty

ECAC
2.8%
European Civil
Aviation
Conference

**300k
more
flights**



±1.5pp

**Strong
downwards
Risks**

**Worst Case
Brexit?**

**More Airline
failures?**

Network Update (YTD - 17 March 2019)

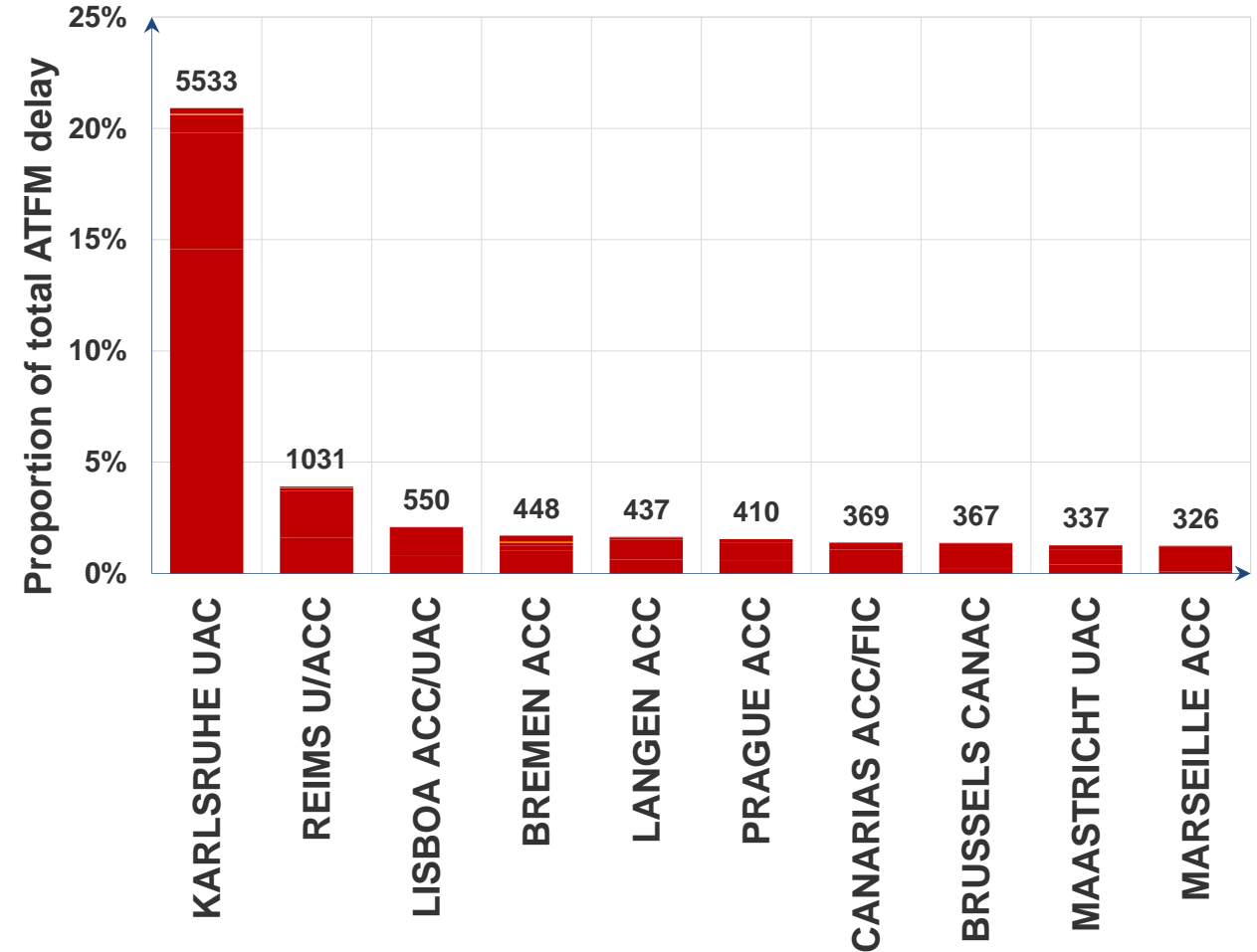
Traffic

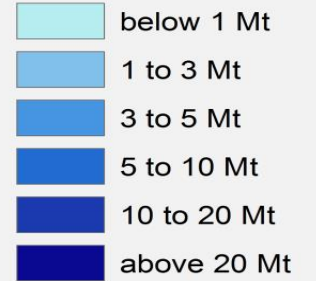
• **+1.7%**
(2 million flights)

Avg. En
Route
Delay
per
Flight

• **+55%**
(0.47 mins)

Top 10 delay locations for year-to-date en-route ATFM delays





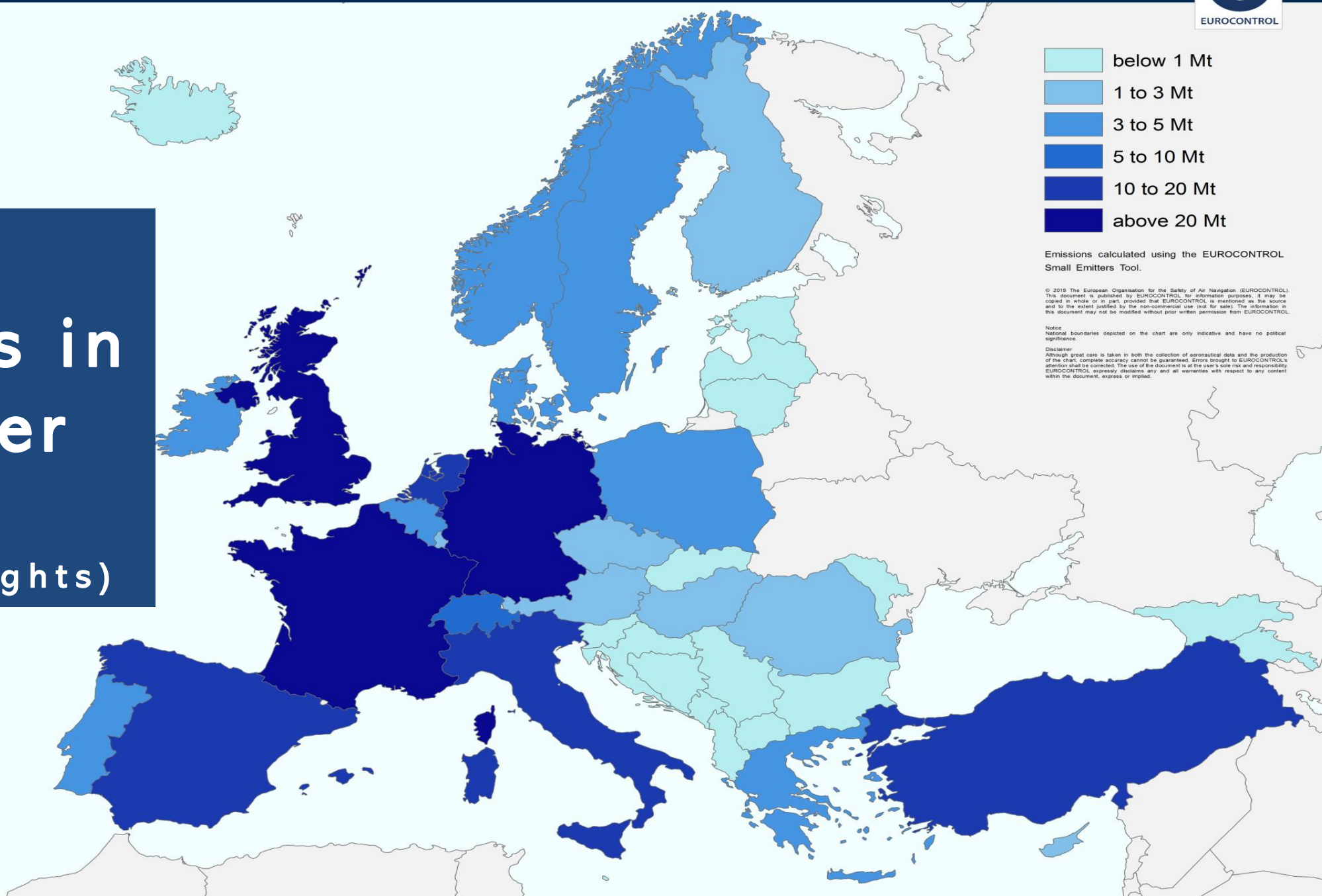
Emissions calculated using the EUROCONTROL Small Emitters Tool.

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Notice: National boundaries depicted on the chart are only indicative and have no political significance.

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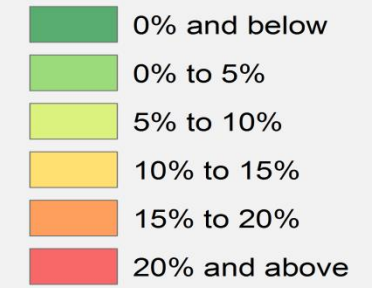
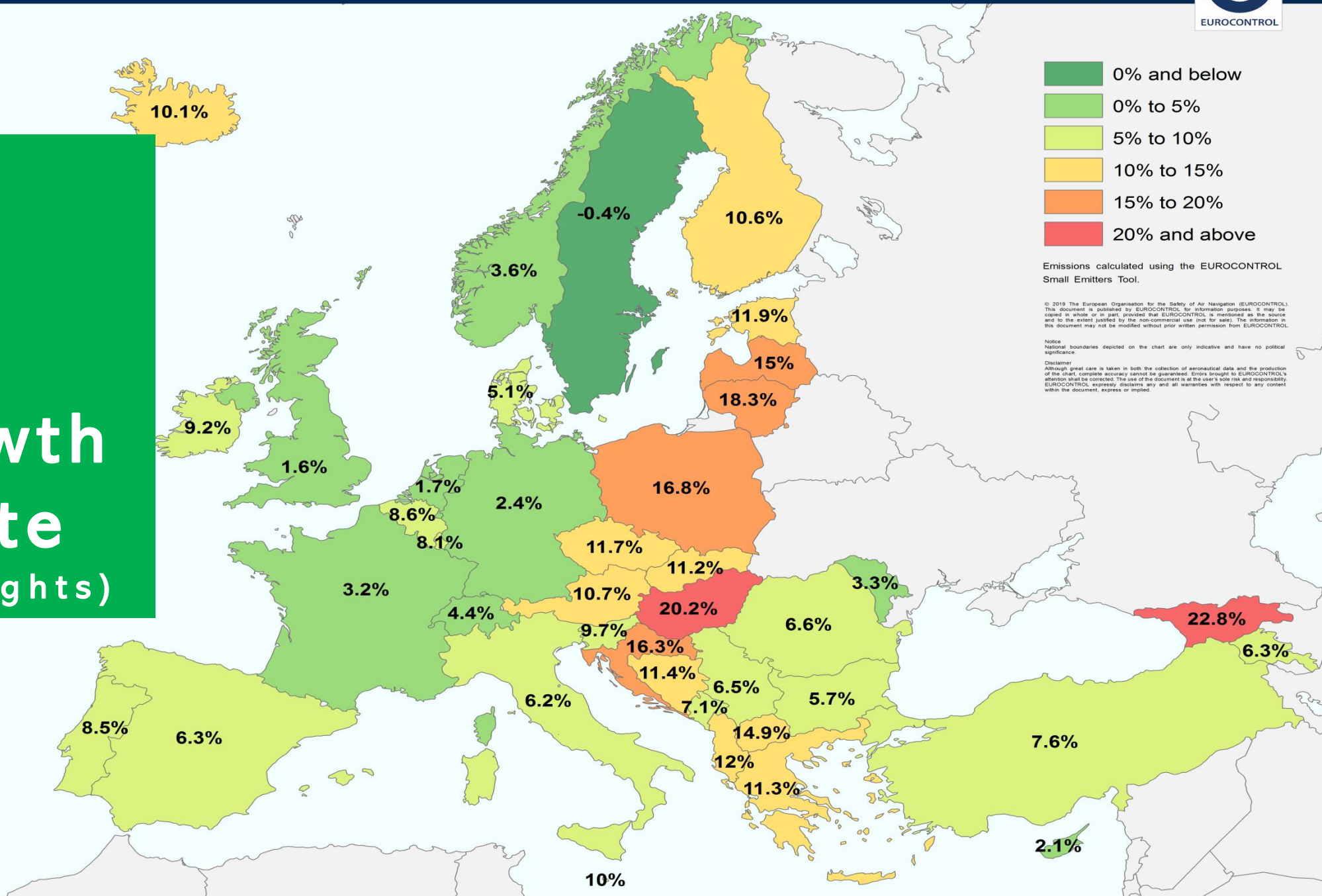
CO₂ Emissions in 2018 Per State (Departing Flights)



CO₂ Emissions Growth in 2018 - Departing Flights



**2018
Vs
2017
CO₂ Growth
Per State
(Departing Flights)**



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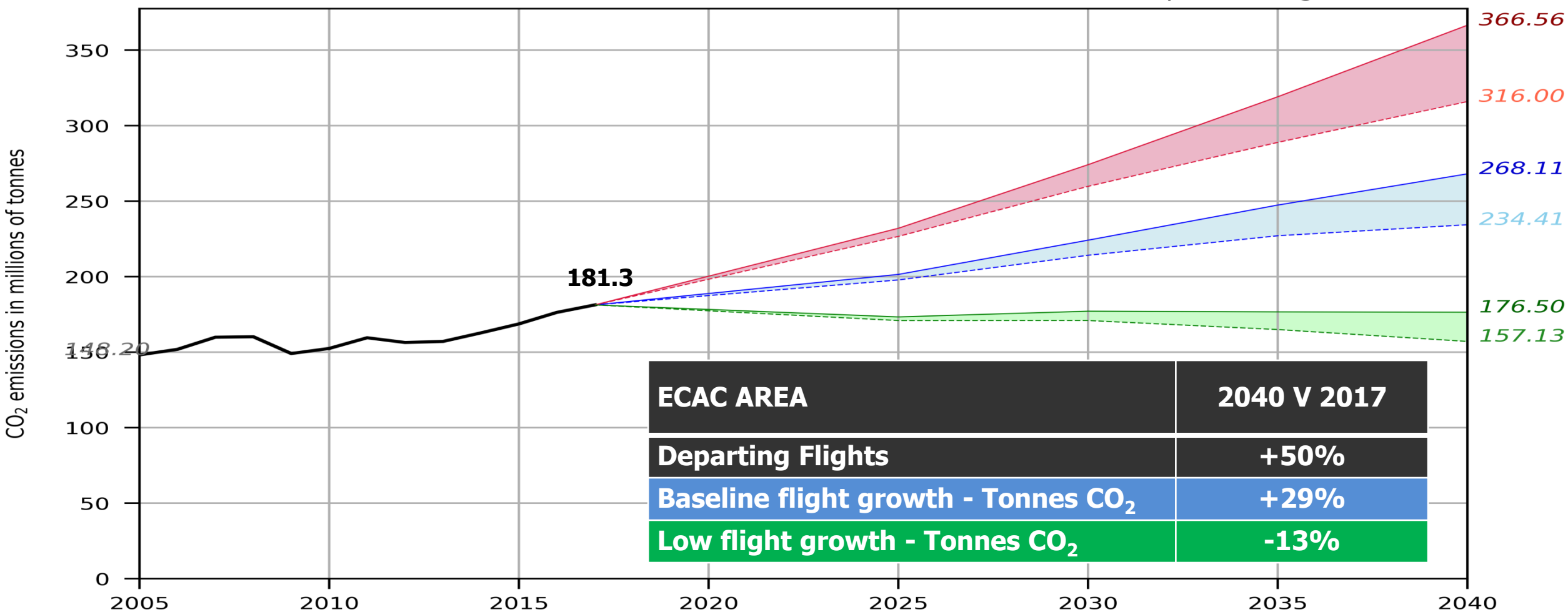
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CO₂ Emissions 2005 - 2040



ECAC AREA

Estimated CO₂ emissions between 2005 and 2040 (IMPACT) - IFR departure flights



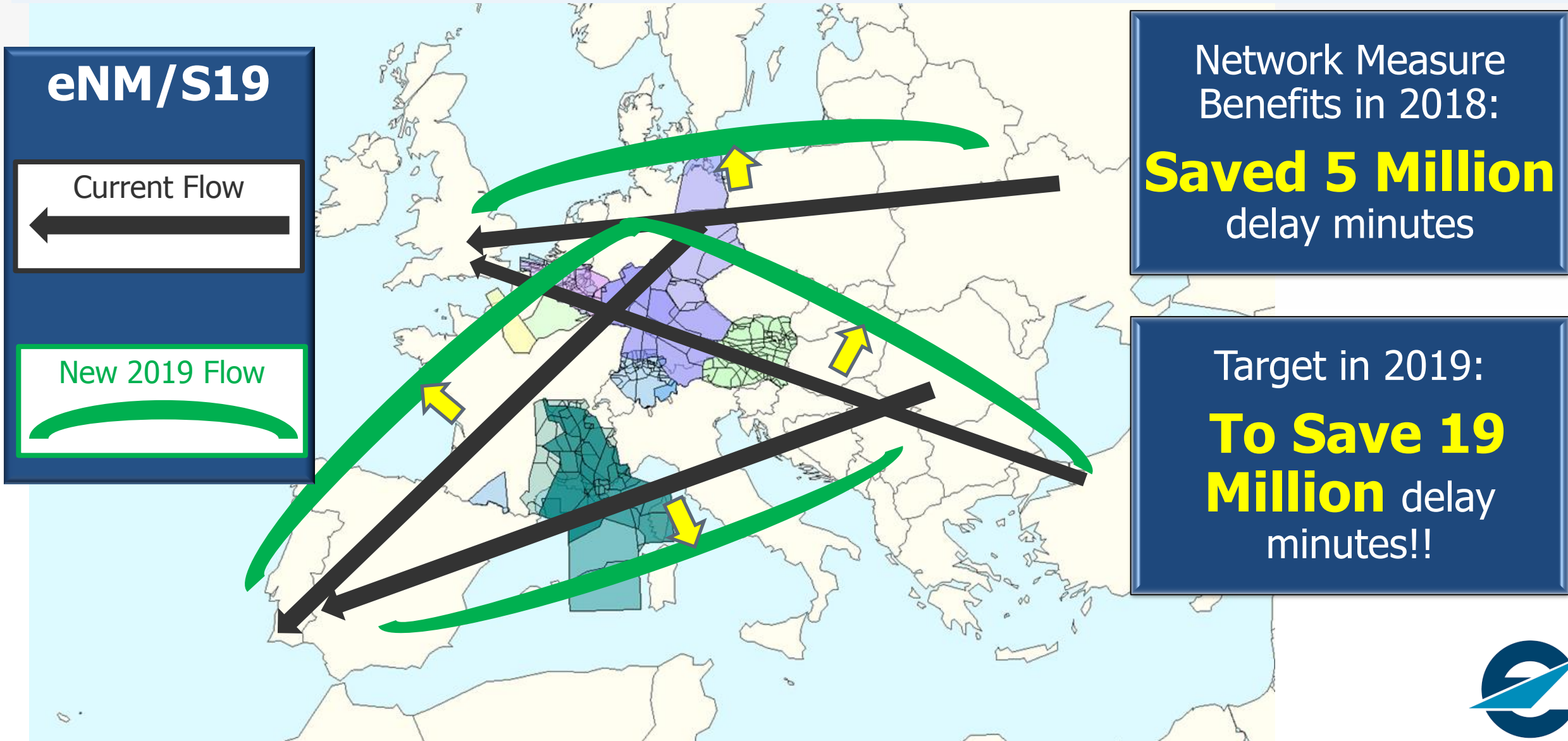
ECAC AREA	2040 V 2017
Departing Flights	+50%
Baseline flight growth - Tonnes CO ₂	+29%
Low flight growth - Tonnes CO ₂	-13%

- Estimated historical emissions
- Base forecast emissions
- High forecast emissions
- Low forecast emissions

Shaded areas show the emissions ranges between assuming technology remains frozen (upper, solid lines) and assuming annual technology improvements of 1.16% incorporated into new aircraft deliveries (lower, dotted lines).

EUROCONTROL NM Actions - Summer 2019

New Traffic Flows & Other Measures to Reduce Network Delays



Wise Persons Group



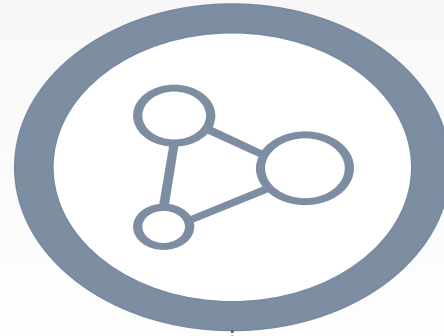
Airspace Architecture Study

- Preliminary recommendations



1

Launch airspace re-configuration and Operational Excellence programmes to achieve quick wins



2

Realise virtual de-fragmentation of European skies



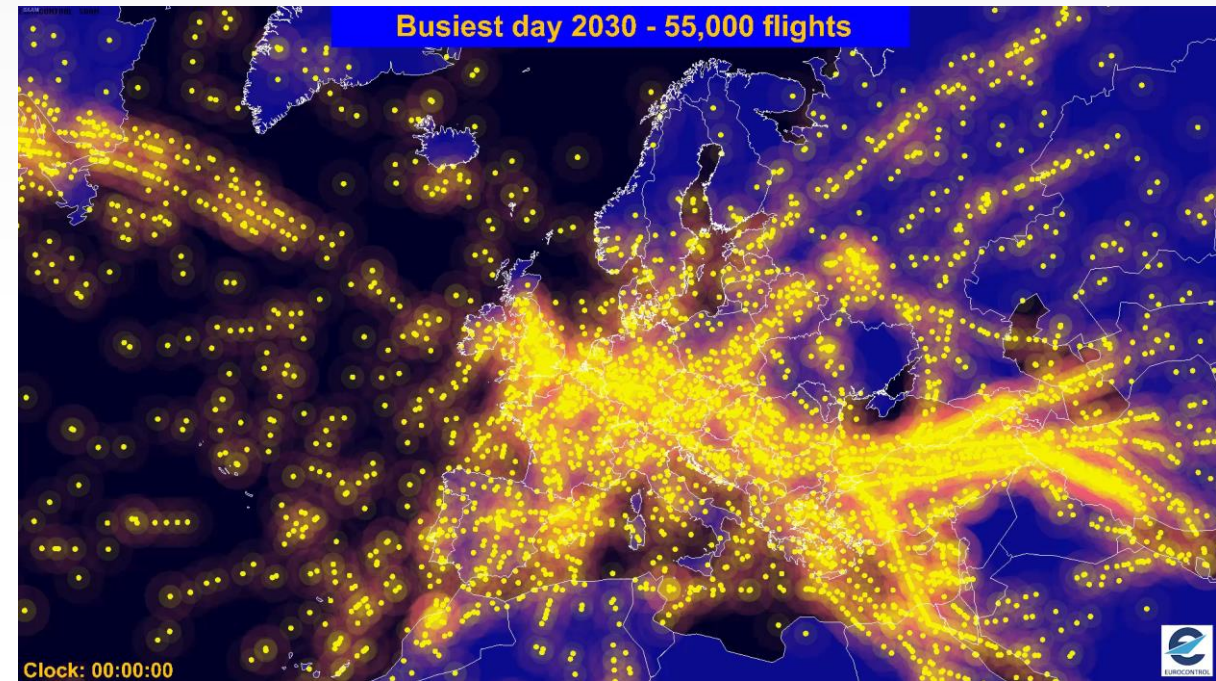
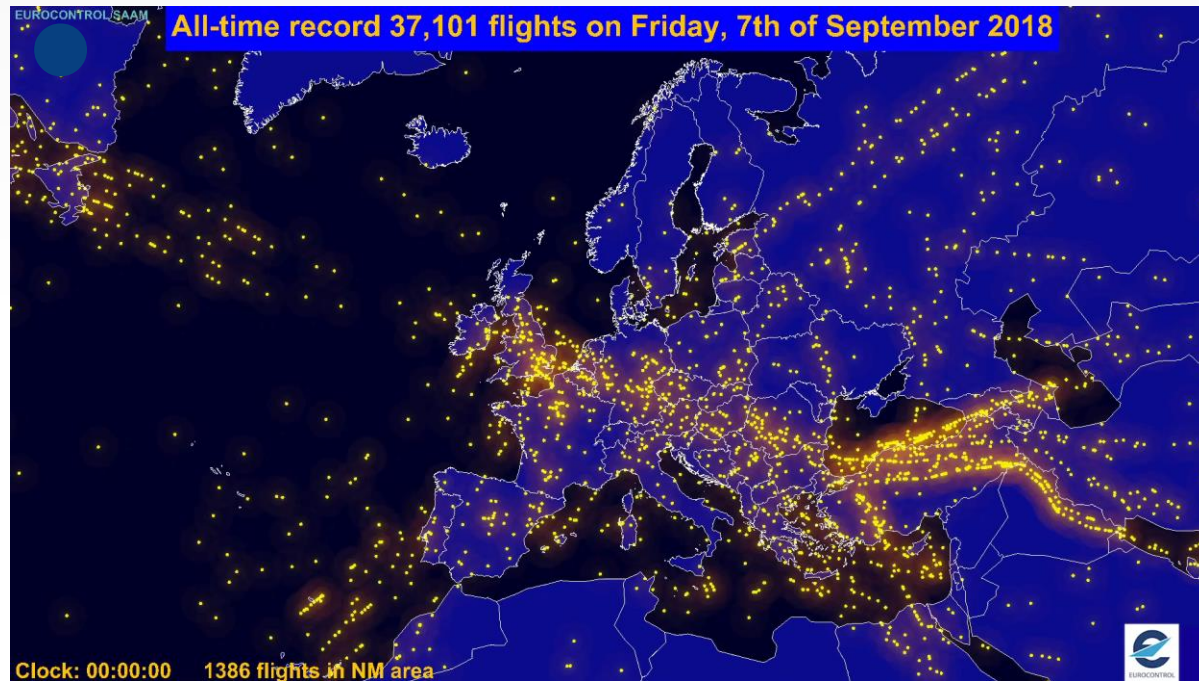
3

Create SES framework that rewards early movers



EUROCONTROL

2018 v 2030





Supporting European **Aviation**



Thank you
Eamonn Brennan, Director General



@eurocontrolDG