

Fact-finding study on allocation of slots at European airports

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Background

- In 2011, the European Commission (EC) proposed changes to Regulation 95/93 ('the Slot proposal'), following an analysis carried out in 2010-2011 that showed that the allocation system in place prevents optimal use of the scarce capacity at busy airports.
- Following amendments by the co-legislators in 2012-2013, the progress of this reform has been pending.
- In view of market developments in recent years, the Commission's impact assessment and Slot proposal are no longer up to date.
- This study aims to collect up to date information, data and views to support the Commission in updating the 2011 impact assessment that accompanied the Slot proposal.



Scope

Review changes in the aviation market since the adoption of the Slot proposal in 2011.

Confirm/update the issues identified at the time of the Slot proposal.

Update the assessment of the impacts of the policy measures considered in 2011.

Analyse whether the amendments made by the co-legislators in 2012 are still relevant.

Consider the links between the Slot Regulation and other aviation policy.

Examples of market developments we will investigate (not exhaustive)

Growth in traffic and in use of airports. Provision of new capacity and changes in declared capacity.

Changes to the airline market: alliances, mergers, joint ventures and bankruptcies.

Changes in capacity allocation at constrained airports (e.g. increased presence of low cost carriers compared to 2011).

Competition cases involving slots remedies.

Functioning of the current slot regulation: coordinator independence, transparency, new entrants, slot trading (where permitted), court cases, etc.

Stakeholder consultation

- The study will be supported by an extensive stakeholder consultation and data collection exercise over September and October 2019.
- We would welcome your participation and support.

Method	Approach	Audience and purpose
Targeted questionnaires	Issuing of questionnaires to 4 key stakeholder groups to collect written submissions.	<ul style="list-style-type: none">• All key industry stakeholders.• Collect views, data and other evidence (e.g. other reports).
Targeted interviews	Face-to-face or telephone interviews with 30 key participants.	<ul style="list-style-type: none">• Selected key industry stakeholders.• Discuss and expand on views and responses to questionnaires.
Detailed data request	Detailed data request and suggested format/template specified for collection of consistent data from coordinators covering selected congested airports.	<ul style="list-style-type: none">• Selected coordinators.• Collection of consistent data to allow for in-depth analysis of the functioning of the Regulation to evidence issues.

Stakeholder consultation

- What we expect to gather during today:
 - Views on the current functioning of the Regulation.
 - Views on the key discussion questions on the need for reform and options for a future slot allocation framework.
 - Contacts and schedules to meet bilaterally.
- What we expect to gather from the stakeholders during the formal consultation:
 - Studies, position papers, data.
 - Views and evidence on the current functioning of the Regulation.
 - Views and evidence on key changes to the market and how that has affected the functioning of the Regulation.
 - Views on the proposals for reform.
 - Views on the interactions between airport slots and other aviation policy areas.



Next steps

- The study started in July 2019 and will be conducted over a 9 month period.
 - A draft final report is due in January 2020.
 - The study is expected to be finalised by Spring 2020.
- Some stakeholders were involved in the inception stage of the study.
- All stakeholders should have been contacted to be involved in the stakeholder consultation (if not please come to speak to us).
- We would welcome your participation and support.
- We are available during the day for you to ask questions and provide contact details.



Thank you

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