The future of regional airports – Challenges and opportunities

source: https://blog.aci.aero
The main assumptions of the opinion:

1. Highlighting the importance of regional airports for the territorial cohesion of the EU and the socio-economic development of regions.

2. Airports vs. challenges in the context of the Green Deal, safety and security as well as new technologies.

3. Providing financial support to regional airports in the EU financial perspective for 2021-27.
The state of regional airports

Airlines, airports and air navigation service providers in 2020

- **56.2 billion** losses
- **1.7 billion** fewer passengers (~55% compared to 2019)
- **6.1 billion** fewer flights
- **191,000** direct redundancies
- **2x** all-cargo market segment doubled from 3% to 6%

- **193 risk of insolvency** in the coming months
- **277,000 jobs**
- **12.4 billion** of GDP
- **30 billion loses** compared to 2019 (~60% of their annual revenue)

ACI Europe's analysis shows that in the medium-term scenario, airports will lose a further EUR 25 billion in revenues in 2021 compared to 2019.

Smaller regional airports have recorded the highest declines in direct connectivity: -96% in Linz (Austria), -95% in Treviso (Italy), -93% in Groningen Eelde (the Netherlands), -91% in Vaasa (Finland), -87% in Quimper (France), -83% in Shannon (Ireland) and -82% in Burgas (Bulgaria).
Possible recovery scenarios

EUROCONTROL STATFOR 5-year forecast for *Europe 2020-2024
Actual and future movements, % traffic compared to 2019

* Europe=ECAC 44 Member States
** Forecast 2020 based on scenario 2

Scenario 1 - vaccine 2021, recovery 2024
Scenario 2 - vaccine 2022, recovery 2026?
Scenario 3 - vaccine not effective, recovery 2029?
Regional airports play a prominent role in the territorial cohesion of the EU, especially for sparsely populated, peripheral and outermost regions.

Territorial cohesion is an objective of the Union recognised by the Lisbon Treaty as the third dimension of the objective of cohesion, alongside with economic and social cohesion.
Record number of 772k passengers served in 2019.
Over last decade air traffic volume has steadily increased.
**European Green Deal**
- vision for the decarbonisation of the aviation/transport sector
- aviation and regional airports must contribute to the EU’s decarbonisation objectives, including by using alternative fuels and improving intermodality (particularly air-rail connections)

**White Paper**
- reduce dependence on oil imports, improve efficiency and decarbonise transport
- importance of intermodality and co-modality through the efficient use of different modes of transport, on their own and in combination with other modes, which in turn leads to an optimal and sustainable use of natural resources.

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**Aviation and EU policies**

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**European Green Deal**
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**SHARE OF TRANSPORT GREENHOUSE GAS EMISSIONS**

- Road transport 71.7%
- Aviation 13.9%
- Maritime 13.3%
- Other transportation 1.1%

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**Passengers departing from EU+ (mln)**

| Year | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | 2032 | 2033 | 2034 | 2035 | 2036 | 2037 | 2038 | 2039 | 2040 | 2041 | 2042 | 2043 | 2044 | 2045 | 2046 | 2047 | 2048 | 2049 | 2050 |
|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|
| Total | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 17.0 |
| Total flights | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 17.0 |
| Departing flights from EU+ (mln) | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 17.0 |

Source: ACI Think Paper #7 - October 2020

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Source: EUROPEAN ENVIRONMENT AGENCY (EEA)
Regional airports of the future

green + safe + digital + supporting intermodality
It is necessary to provide EU funds, in the context of cohesion policy for 2021-27:

- to co-finance investments in regional airports that directly support processes relating to decarbonisation and the low-carbon circular economy model
- for the development of safety and security infrastructure, and to make use of innovative technologies as well as digitalisation supporting airports in their contribution to the objectives of the European Green Deal
- to support the introduction and application of results of R&D work related in particular to the reduction of emissions and noise levels of aircraft engines

Sources of funding:

- Recovery Plan for Europe (Next Generation EU)
- National Operational Programms
- Regional Operational Programms

It is also important, as part of the legislative process, for the European Commission to develop even more flexible and more effective public aid rules that enable Member States to provide regional airports the financial assistance they need.
### Timetable for the development of the opinion and consultation

<table>
<thead>
<tr>
<th>Event</th>
<th>Date Range</th>
<th>Partner</th>
<th>Date and time</th>
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<tbody>
<tr>
<td>Policy analysis (provided by the Secretariat)</td>
<td>February 2021</td>
<td></td>
<td></td>
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<tr>
<td>Meetings with stakeholders</td>
<td>Between January and March 2021</td>
<td>DG COMP</td>
<td>12 February, 14:30</td>
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<tr>
<td>Submission of your working document</td>
<td>Between 1-3 February 2021, depending on the size of the document</td>
<td>PT PRES</td>
<td>16 February, 15:00</td>
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<tr>
<td>Exchange of views in COTER</td>
<td>26 February 2021</td>
<td>DG MOVE</td>
<td>9 March, 15:00</td>
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<tr>
<td>Submission of your draft opinion</td>
<td>Between 19-25 March 2021, depending on the size of the document</td>
<td>Clean Sky 2</td>
<td>22 February, 11:00</td>
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<td>Deadline for amendments:</td>
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<tr>
<td>- for members</td>
<td>- 12 April (3pm)</td>
<td>Airport Region Council</td>
<td>25 February, 9:00</td>
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<tr>
<td>- for rapporteur</td>
<td>- 19 April (12pm)</td>
<td>MEPS – R. Zile, K. Zlotowski</td>
<td>2 March, 11:00</td>
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<td>First discussion and adoption in COTER</td>
<td>23 April 2021</td>
<td>Airport Council International (ACI)</td>
<td>TBC</td>
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<td>Deadline for amendments:</td>
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<td>- for members</td>
<td>- 15 June (3pm)</td>
<td>Board of Representatives of Airlines in Poland (BARIP)</td>
<td>TBC</td>
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<td>- for rapporteur</td>
<td>- 24 June (12pm)</td>
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<tr>
<td>Adoption in plenary</td>
<td>30 June/1st July 2021</td>
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Thank you for your attention