



AIR TRANSPORT DEVELOPMENT IN THE DANUBE REGION

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ONGOING RESEARCH...

- ◎ Project leader (2010-2014) “*Software development and national database for strategic management and development of transportation means and infrastructure in road, rail, air and inland waterways transport using the European transport network models*”
- ◎ COST (European Cooperation in Science and Technology) Action Management Committee Member (2013-2017) - Transport and Urban Development COST Action TU1209 “Transport Equity Analysis: assessment and integration of equity criteria in transportation planning (TEA)”



REPORTING FROM THE AIR TRANSPORT DEVELOPMENT SEMINAR - PRIORITY AREA 1B: TO IMPROVE MOBILITY AND MULTIMODALITY - RAIL, ROAD AND AIR LINKS

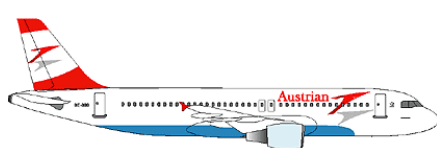
- ◎ Aim of the seminar was:
 - to have a look at the air transport regulatory framework for carrying out air transport services in the Danube region, in particular between EU and non-EU Member States,
 - to obtain insight into state of play of Air transport connectivity in the Danube region and
 - to discuss a potential for development of air transport connectivity in the Danube Region.
- ◎ Participation of: government representatives, decision makers, operators, transport planners, air transport experts...





FLIGHTPATH 2013...

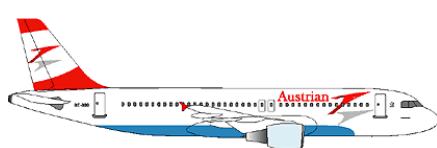
- ◉ Challenge to regional airports and airlines to be more innovative in search for the business model and to work together to better serve the regional air transport needs
- ◉ ECAA agreement has a major role to play in linking candidate countries to EU Member States (Serbia signed in 2006).
 - EASA visits to countries of the region provide good results.
 - All countries of the Danube region are part of SES (Single European Sky) and
 - Serbia and Montenegro are working on joint FAB (Functional Airspace Block) that would fill in the gap between FAB CE, Danube FAB and Blue MED FAB.
- ◉ Expectations from AirSerbia - new routes to the Danube region's cities:
 - 12 new destinations is planned, 8 of them will serve routes within the Danube region.
- ◉ Low level of the connectivity within the SEE region (source SEETO comprehensive network)
 - Two regional “hubs” are detected - Belgrade with 8 routes; Zagreb with 7 routes; other 15 airports have max 2 routes within the region.
 - 17 airports and 136 connections were examined.
 - Commission and Western EU Member States are worried of “capacity crunch” there are airports in the SEE with about 80% of airport capacities underused





FUTURE DEVELOPMENT OPERATORS (AIRPORT) ISSUES

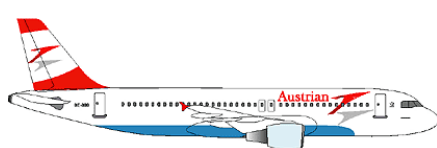
- ◎ Airport “Nikola Tesla” Belgrade is a good example of reinvestment strategy and airport capacity development; some additional investments were re-directed due to Airport “Constantine the Great” Niš lack of financial sources
 - For example, all goals from the General Master Transport Plan in Serbia have been achieved
- ◎ Small airports should be flexible in order to survive, hence being able to adopt to needs of the catchment area they serve.
 - Connections with regional hubs should be performed with smaller airplanes fleet, logistic centres (where needed) planned and general aviation need to be supported.





FUTURE DEVELOPMENT AIRLINES ISSUES

- ◎ Air carriers are nowadays at the most difficult period, while airports and CAAs are at a little better position.
 - National air carriers vs. low cost or low fare
 - Aircraft fleet and aircraft capacity
- ◎ Several opportunities for cooperation between companies that enjoy the respect and trust on regional aircraft maintenance market and quality of services. However cooperation between air operators from various regions remains challenge for the future.



NATIONAL AIR CARRIERS IN THE DANUBE REGION

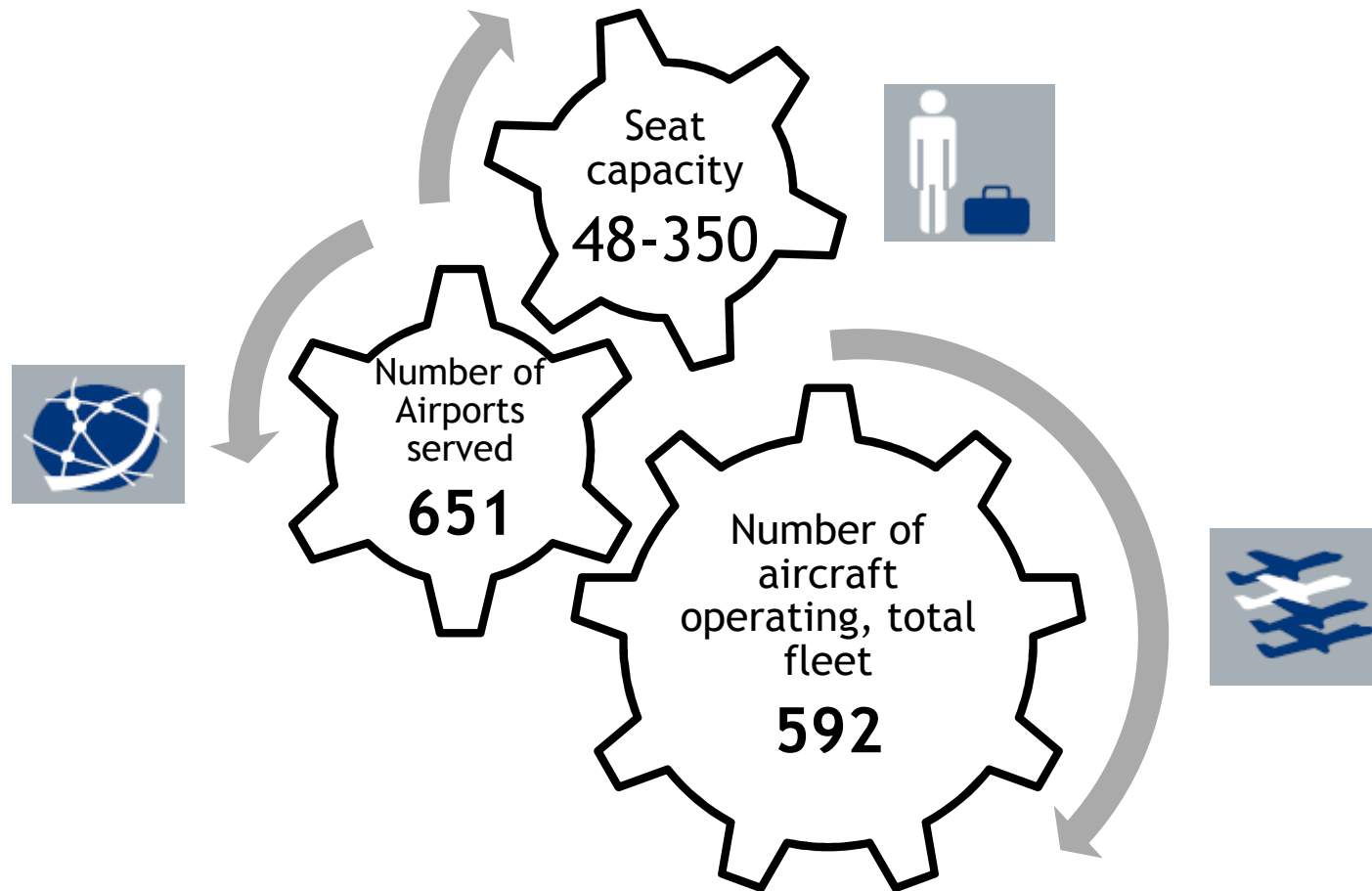


© 14 countries, 12 national air carriers - EU (7), non EU (5);



AIR CARRIERS IN NUMBERS

48-50-64-66-68-70-76-84-86-104-107-108-110-112-113-114-116-130-
134-135-144-148-162-170-174-180-186-189-209-215-276-350



AIR CARRIERS IN NUMBERS

○ Number of aircraft operating

- Lufthansa (360)
- Austrian Airlines (77)
- Czech Airlines (27)
- Adria Airways (13)
- Croatia Airlines (13)
- Bulgaria Air (9)
- Tarom (24)
- Jat Airways (15)
- B&H Airlines (2)
- Montenegro Airlines (8)
- Ukraine International Airlines (40)
- Air Moldova (4)

Lufthansa 61%; Austrian Airlines 13%; Others 26%

○ Number of airports served

- Lufthansa (280)
- Austrian Airlines (130)
- Czech Airlines (47)
- Adria Airways (18)
- Croatia Airlines (25)
- Bulgaria Air (28)
- Tarom (37)
- Jat Airways (35)
- B&H Airlines (5)
- Montenegro Airlines (13)
- Ukraine International Airlines (75)
- Air Moldova (20)

Lufthansa 33%; Austrian Airlines 20%; Others 47%

REGIONAL COOPERATION?



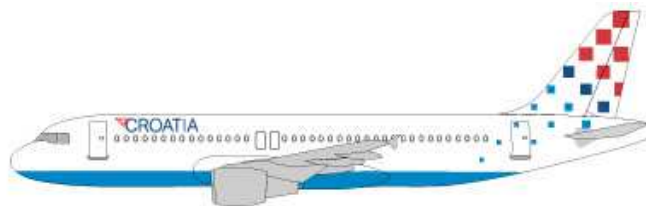
35 →

- 10 Boeing 737-300 (134 seats)
- 2 ATR 72-500 (70 seats)
- 3 ATR 72-202 (66 seats)



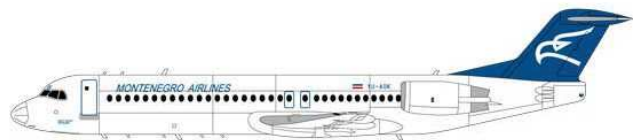
18 →

- 1 Airbus A320 (180 seats)
- 2 Airbus A319 (135)
- 4 Bombardier CRJ900 (86 seats)
- 6 Bombardier CRJ200 LR (48-50 seats)



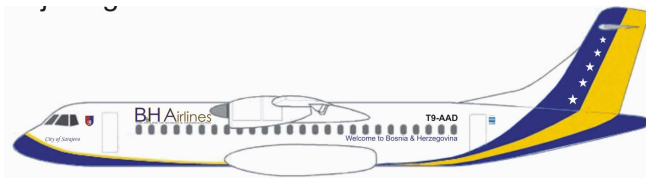
25 →

- 3 Airbus A320 (162 seats)
- 4 Airbus A319 (144)
- 6 Dash 8-Q400 (76 seats)



13 →

- 3 Embraer E-195LR (116 seats)
- 5 Fokker 100 (102 seats)



5 →

- 2 ATR 72-200 (66 seats)

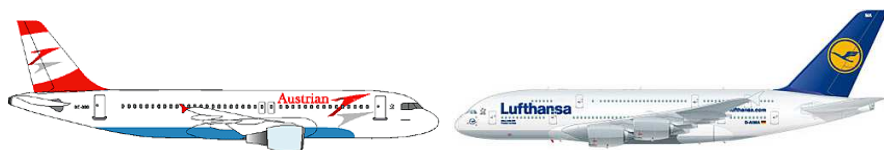
AIR TRANSPORT DEVELOPMENT STRATEGY IN THE DANUBE REGION - CONCLUSIONS

- Air connectivity is the key to the economic growth in the Danube region.
 - 35% of goods travel by air - that's of all world trade by value.
 - 3.5% of the regional and global economy relies on aviation (source IATA, 2013).
 - Aviation will cut its net carbon emissions 50% by 2050 (compared to 2005).
 - 90% of travelers within Europe are able to complete their journey, door-to-door within 4 hours.
 - There is one accident for every 5 million flights on western-built jet aircraft.
- Better air connectivity within the Danube region could significantly ensure suitable and sustainable mobility of passengers and freight.
- GA and helicopter transport system (European air transport in 2050) in the Danube region is a solution to improve infrastructure utilization and regional connectivity.



Research and innovation friendly environment for Danube region

- * Air transport equity assesment in the Danube Region
- ** Air transport conectivity in the Danube region
- ***Support from ACARE, SESAR, FP7/Horizon 2020 funding



THANK YOU FOR YOUR ATTENTION!



Further questions:

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