Séminaire Nasse, Jeudi 9 Janvier 2014

Concurrence dans les aéroports

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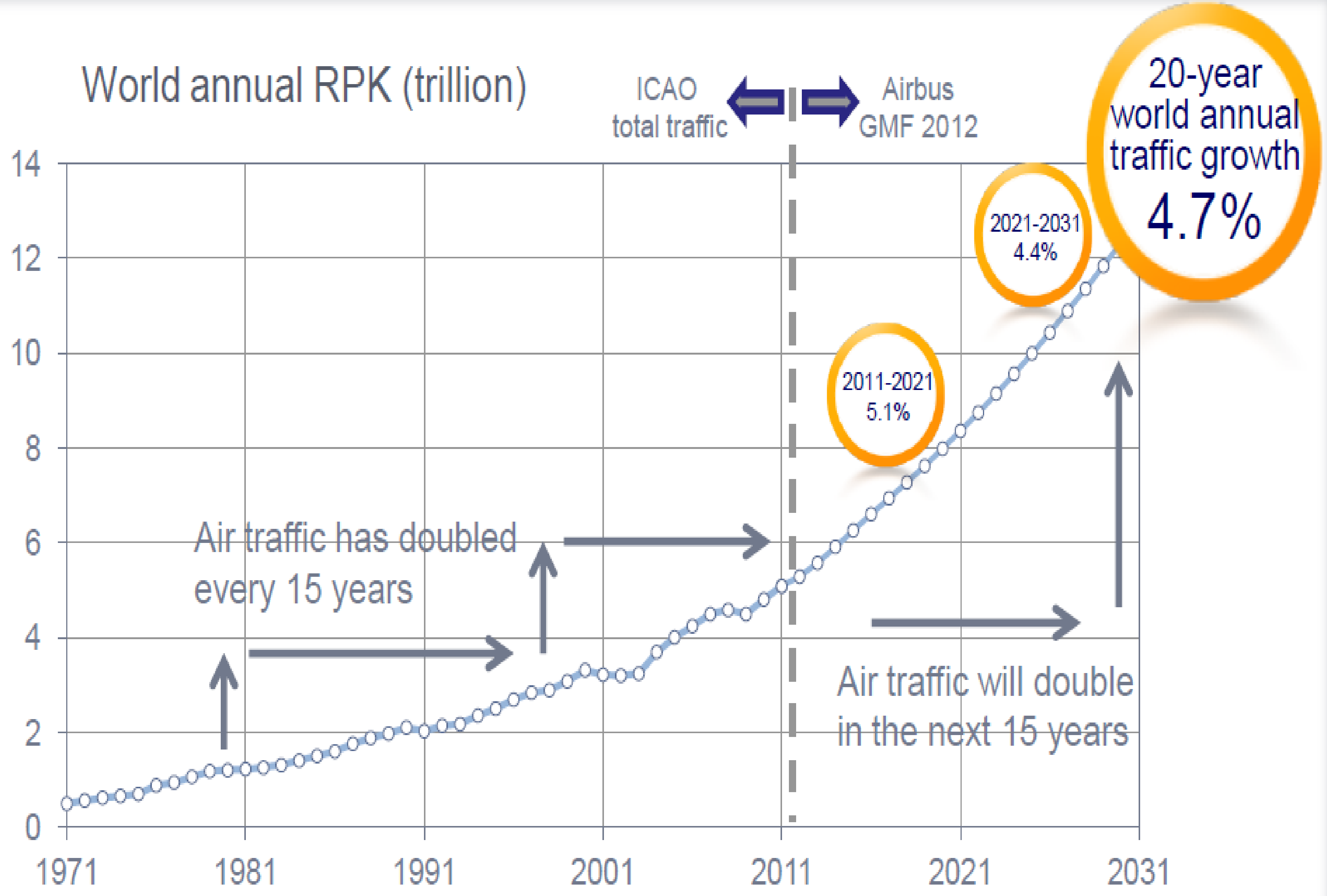


Source : Airbus 2013

Tableau 5 : L'effet d'induction et la part captée par l'opérateur historique
(Tableau réalisé par l'auteur)

Ligne régulière	Progression du trafic résultant du seul effet d'induction	Part du trafic induit capté par l'opérateur historique
Lyon-Toulouse (2008-2009)	+ 43 %	49 %
Lyon-Bordeaux (2008-2009)	+ 48 %	45 %
Lyon-Bastia (2008-2009)	+ 114 %	38 %
Lyon-Madrid (2007-2009)	+ 37 %	10 %
Lyon-Barcelone (2007-2009)	+ 98 %	38 %
Lyon-Lisbonne (2008-2009)	+ 85 %	48 %
Lyon-Porto (2008-2009)*	+ 430 %	–
Lyon-Rome (2007-2009)	+ 230 %	48 %
Lyon-Venise (2008-2009)	+ 104 %	58 %
Lyon-Marrackech (2008-2009)	+ 36 %	–
Lyon-Londres (2008-2009)	+ 17 %	0 %
Moyenne	+ 112 %	37 %

** Sortie de TAP en 2009*

TABLE 2 PASSENGER NUMBERS (MILLIONS) OTHER AIRPORTS

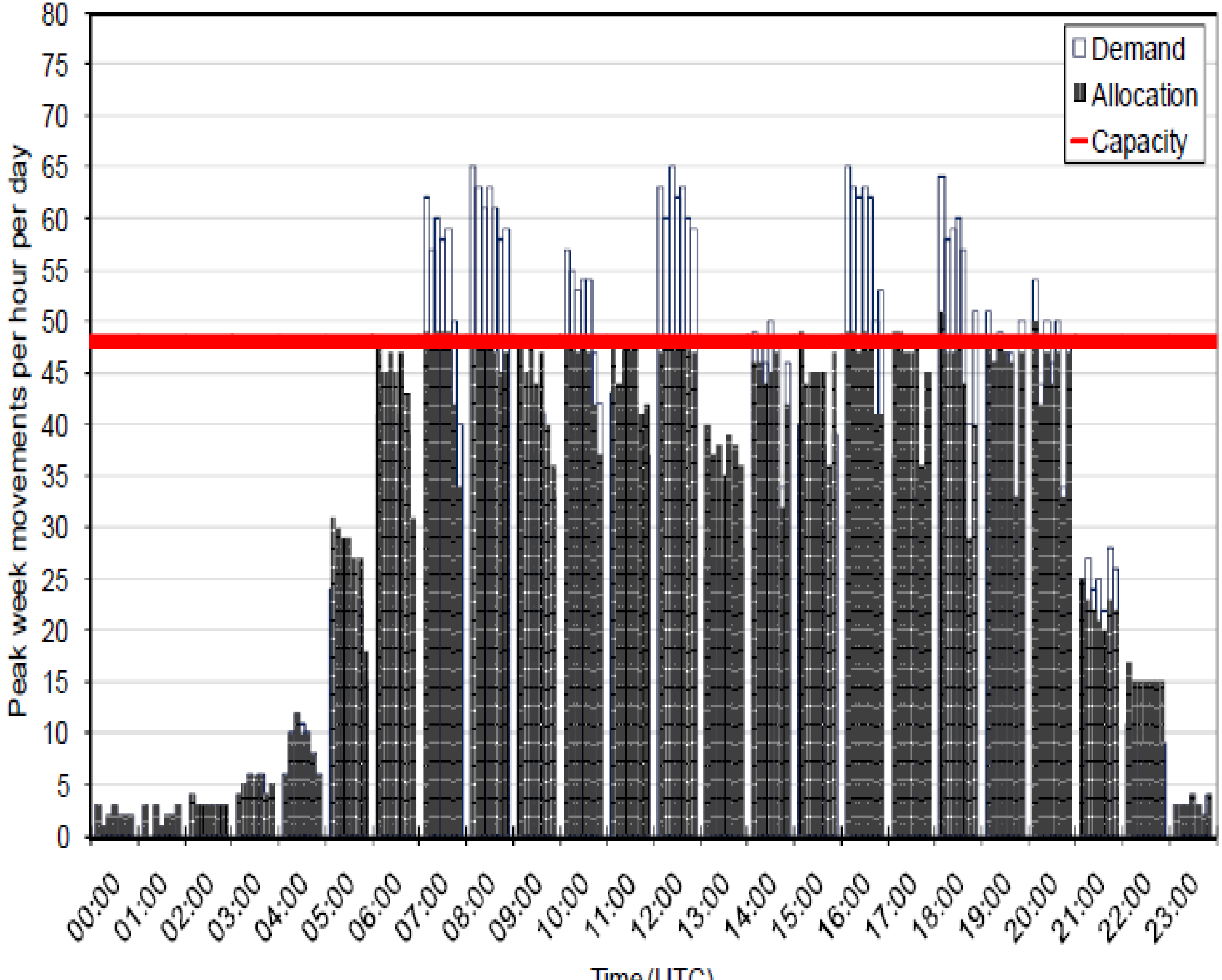
State	Airport	2009	2016	2025
AT	Vienna	18.1	22.9	32.6
BE	Brussels National	17.0	21.5	30.6
CZ	Prague	11.6	14.7	21.0
DK	Copenhagen - Kastrup	19.7	24.9	35.5
DK	Billund	2.3	2.9	4.1
FI	Helsinki-Vantaa	12.6	15.9	22.7
FR	Paris CDG	57.7	70.1	93.9
FR	Paris Orly	25.0	31.6	45.0
FR	Nice Côte d'Azur	9.8	12.4	17.6
FR	Lyon Saint-Exupery	7.6	9.6	13.6
DE	Frankfurt	50.6	61.5	82.4
DE	Dusseldorf	17.8	22.5	32.0
DE	Munich	32.6	41.3	58.8
DE	Stuttgart	8.9	11.3	16.0

Paris Orly ORY

Inputs	2010	2012	2017	2025
Annual allocation cap	250,000	250,000	250,000	250,000
Slot transfers through pool	1.1%	1.1%	1.1%	1.1%
Secondary trading	0.0%	0.0%	0.0%	0.0%
Slot utilisation	95.9%	95.9%	95.9%	95.9%
Annual totals	**2010**	**2012**	**2017**	**2025**
Slot requests	293,437	306,491	341,721	406,704
Initial slot allocation	253,360	253,360	253,360	253,360
Operated flights	243,016	243,016	243,016	243,016

FIGURE 8 MADRID SLOT REQUESTS AND ALLOCATION

S10
Arrivals:



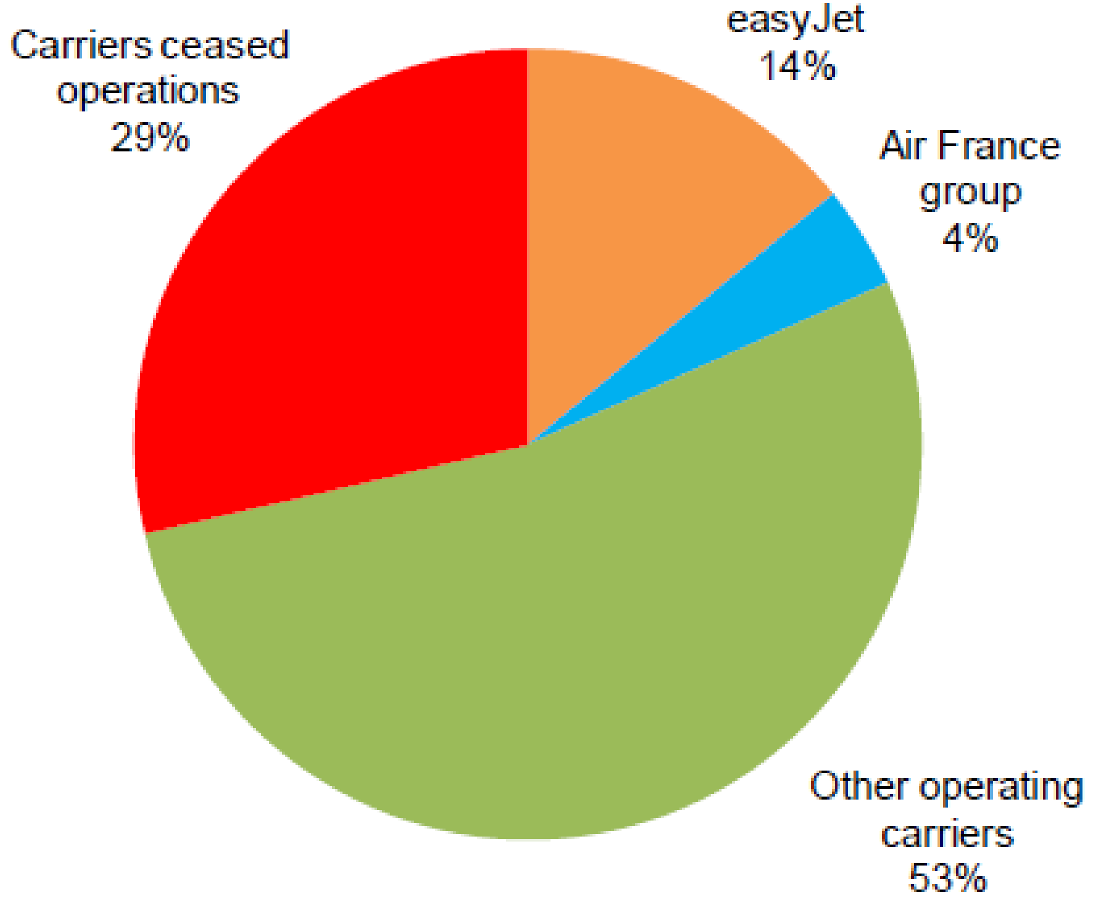
London Heathrow	Demand exceeds capacity most or all day	Demand exceeds capacity most or all day	Demand exceeds capacity most or all day	Assumes no third runway, or mixed mode, or relaxation of annual movement cap.
Madrid Barajas	Demand exceeds capacity during part of day	Demand exceeds capacity during part of day	Demand exceeds capacity during part of day	Assumes ATC improvements increase capacity from 98 to 120 movements/hour by 2020 (increase phased in from 2014)
Milan Linate	Demand exceeds capacity most or all day	Demand exceeds capacity most or all day	Demand exceeds capacity most or all day	Assumes no amendment to Bersani Decree
Munich	Demand exceeds capacity during part of day	Sufficient capacity most or all day	Demand exceeds capacity during part of day	Assume third runway operational by 2017
Palma de Mallorca	Sufficient capacity most or all day	Sufficient capacity most or all day	Sufficient capacity most or all day	Assume additional capacity added when required
Paris CDG	Demand exceeds capacity during part of day	Demand exceeds capacity during part of day	Demand exceeds capacity most or all day	Assumes increase from 114 to 120 movements/hour by 2015, but no further increase (e.g. fifth runway)
Paris Orly	Demand exceeds capacity most or all day	Demand exceeds capacity most or all day	Demand exceeds capacity most or all day	Assumes no relaxation of annual slot cap

TABLE 2 HISTORIC SLOTS

Airport	Historics as % of total allocation	Period covered by data
Dublin	82.5%	S06-W10
Düsseldorf	87.4%	W09-S10
Frankfurt	91.6%	W09-S10
London Gatwick	88.5%	S06-W10
London Heathrow	99.1%	S06-W10
Madrid Barajas	85.5%	W05-S10
Munich	90.9%	W09-S10
Palma de Mallorca	74.1%	W05-S10
Paris CDG	89.7%	W08-S10
Vienna	83.7%	W07-W10

Source: SDG analysis of coordinator data

FIGURE 1 SLOT ALLOCATIONS AT ORLY 2002-2010



Source: SDG analysis of COHOR data

TABLE 2 SLOT TRADES AT HEATHROW AND GATWICK

From	To	Transaction date	Slots / week	Description
Heathrow airport:				
BMI	British Airways	28-Mar-2010	7	Return of various slots (Inconsistent times)
BMI	Swiss	28-Mar-2010	84	Six daily slot pairs (Cont from Winter 2009)
BMI	Brussels Airlines	28-Mar-2010	50	Approx four daily slot pairs, missing some weekend frequencies (Cont from Winter 2009)
BMI	Aegean Airlines	28-Mar-2010	28	Daily midday and evening slot pairs (Cont from Winter 2009)
Virgin Atlantic	Aer Lingus	28-Mar-2010	42	Three daily slot pairs (Cont from Winter 2009)
Continental	Air Canada	28-Mar-2010	14	Return of daily morning slot pair from Summer 2009

TABLE 1 ASSUMPTIONS

Airport	Impact on slot mobility	Impact on aircraft size	Impact on type of airline/flight
Düsseldorf	Medium	Medium	Move towards longer distance and larger aircraft types
London Gatwick	Trading already in baseline. 10% increase in number of trades.	Medium	Based on actual experience (low cost airlines main buyers)
London Heathrow	Trading already in baseline. 10% increase in number of trades.	High (but reducing)	Based on actual experience (non-EU airlines main buyers)
Madrid	Low	Low	Where demand exceeds capacity, towards longer distance and larger aircraft types
Paris Orly	High	Medium	Low cost airlines main buyers
Vienna	Low	Low	Where demand exceeds capacity, towards longer distance and larger aircraft types

Trafic en 2012	Nombre d'aéroports français
Plus d'un million de passagers	17
Entre 500 000 et un million de passagers	2
Entre 200 000 et 500 000 passagers	14
Entre 1 000 et 200 000 passagers	46
Moins de 1 000 passagers	71

Source : Direction générale de l'aviation civile

Table 14: Benefits for Regional Economies from the LCA activities

Airport, Region	Main findings
Carcassone, France (a)	Passengers generated (2003): 253000; Direct income: 8.4 millions €; Indirect income: 135 millions €; Induced income: 272.4 millions €.
Cologne Bonn, Germany (b)	Taxes paid 91 millions €; Cost & productivity advantages for companies in region: 147.6 millions€; Average spent per incoming passenger: 285.42€.
Pisa, Italy (c)	Passengers generated (2003): 316000; Average spent per business incoming passenger: 431.40€. Average spent per tourism incoming passenger: 496.52€. Total economic impact of foreign passengers: 149.2 millions €.

Ract Madoux Groupe Second Axe (2003) Rapport d'etude: impact socio-economique de la compagnie aerienne Ryanair dans la region et alentours de Carcassone.

Institut für Verkehrswissenschaft, Universität zu Köln (2004) die regionalwirtschaftlichen Auswirkungen des Low-cost-Markets im Raum Köln/Bonn.

S. Anna University of Pisa (2003).