



Harmonisation and the creation of the EU Aviation Market

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I. EU's Aviation Market

The EU's Aviation Market

- The territory of the 27 Member States represents **one Single Aviation Market** (*in fact larger: Norway, Switzerland, Iceland, UK*)
 - Freedom of establishment & provision of services
 - Freedom of movement of goods, capital, etc.
 - No barriers to trade (technical harmonisation of standards)
 - Firms have unrestricted access to 500 million consumers
- **EU law has primacy over national law**



EU Single Market in Aviation

Where we are coming from



Before 1987



During 1987-1992

Where we are now



After 1992



Single market – common rules

Aspects of aviation regulated at EU level:

- ✓ Licenses, fares, market access (in the EU)
- ✓ Air passenger rights
- ✓ Allocation of slots
- ✓ Ground handling
- ✓ Computer Reservation Systems
- ✓ Noise
- ✓ Security
- ✓ Safety
- ✓ Air Traffic Management - Single European Sky
- ✓ Strict competition and state aid rules

Air Services Regulation

- Sets out the requirements for the **granting and oversight of the operating licences** by the Member States (the concept of “Community air carrier”)
- **Open market access** (including cabotage) for all Community air carriers
- Liberalisation of **ownership and control requirements** in the internal market
- Procedures for **traffic distribution** between airports
- **Freedom to set passenger fares and cargo rates** by air carriers



Safety Basic Regulation

Common EU requirements for:

- ✓ **Airworthiness** and environmental protection
- ✓ **Aircrew**
- ✓ **Air operations:** aircraft operators
- ✓ **Aerodromes:** including groundhandling services
- ✓ **Air Traffic Management and Air Navigation Services:** ANSPs, organisations for design/production/maintenance of systems and constituents, use of airspace, and design of airspace structures
- ✓ **Air Traffic Controllers:** licensing
- ✓ **Unmanned aircraft** (drones)
- ✓ **Aircraft used by a third-country operator** into, within or out of the Union

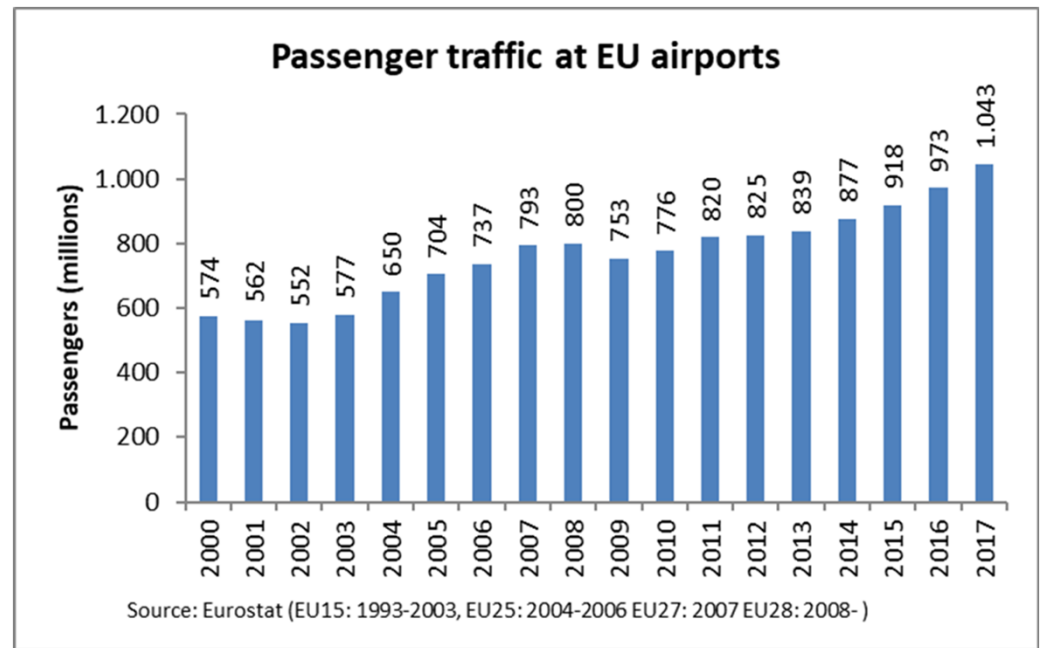
The European Aviation Safety Agency (EASA)

- Main tasks:
 - **Assists the Commission in rulemaking** & international negotiations
 - **Monitors compliance of EU Member States with the requirements** and reports to the Commission
 - **Certifies products, and organisations** located in third countries
 - **Issues authorisations to third country aircraft** operators
 - **Coordinates ramp inspection programmes** (SAFA/SACA)
 - **Provides training** and accredits training organisations
 - Cooperates with foreign aviation authorities & ICAO
 - Conducts safety analysis and research



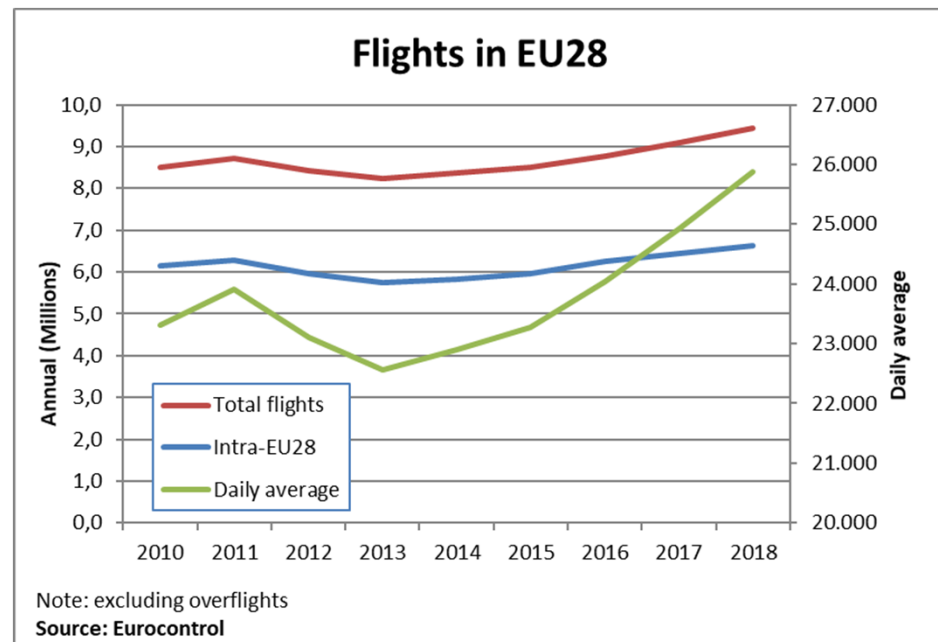
EU Aviation Market – a success story

- Since 2002 the number of passengers at EU airports has almost doubled (nearly tripled since 1992)
- Represents 1/4th of the world's market
- Almost every EU citizen takes one return trip annually on average.



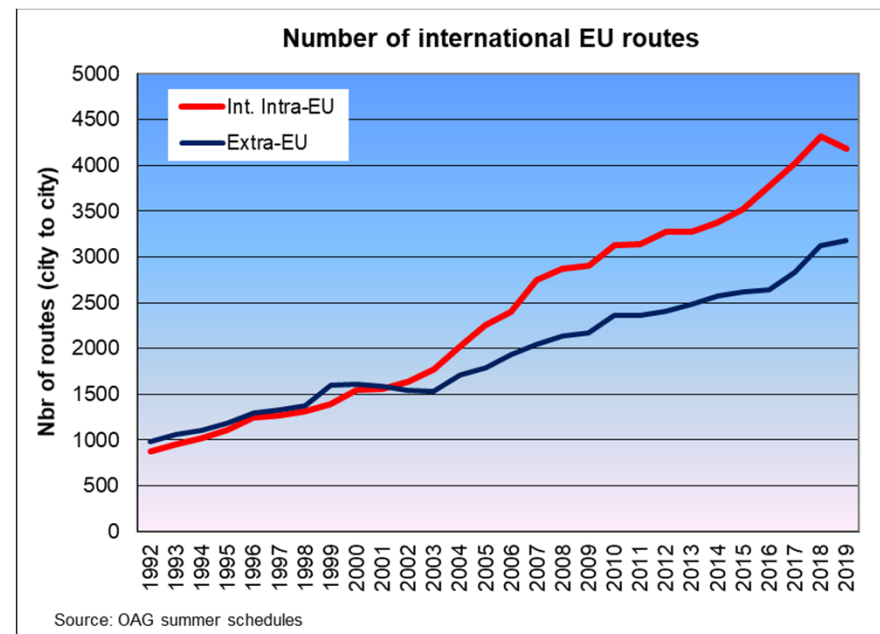
EU Aviation Market – a success story

- Since 1992 the average number of flights/day at EU airports has grown from less than 10.000 to almost 26.000
- On average there is one flight departure every 5 seconds within EU
- Every day some 3 million passengers fly at EU skies.



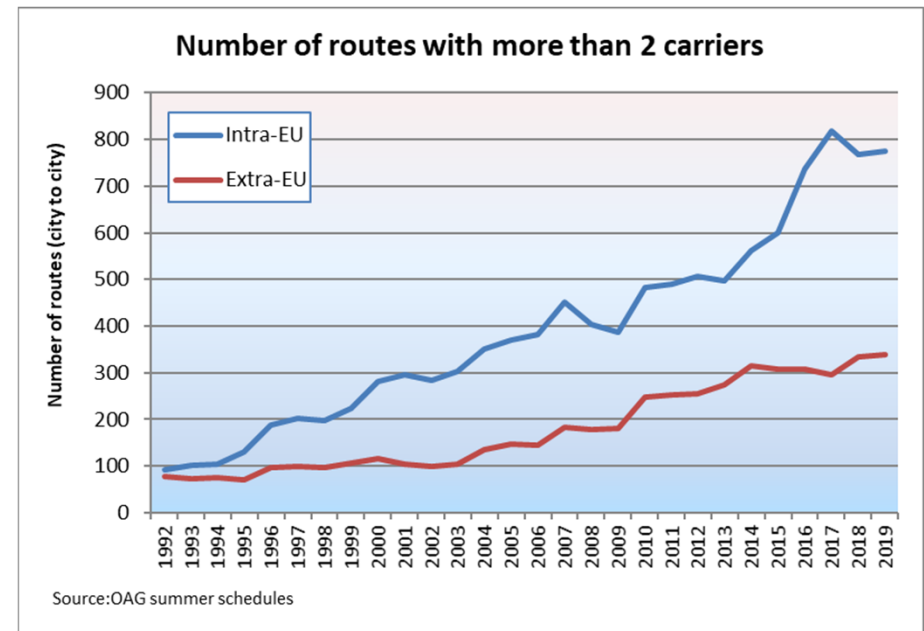
EU Aviation Market – a success story

- More connectivity: 4 fold increase of Intl. routes between 1992 and 2019
- Since 2002 the number of International Intra-EU routes bypassed the number of Extra-EU routes



EU Aviation Market – a success story

- More competition: Intra-EU routes with more than 2 carriers have increased over eight fold between 1992-2017,
- On Extra-EU routes the respective increase was "only" four fold up to 2018

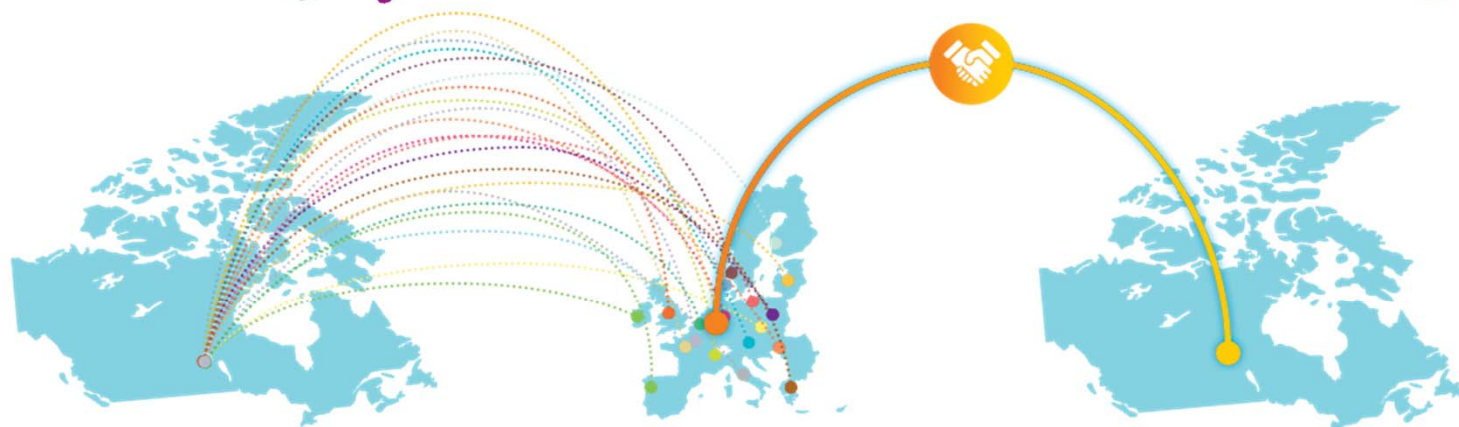


II. EU's External Aviation Policy



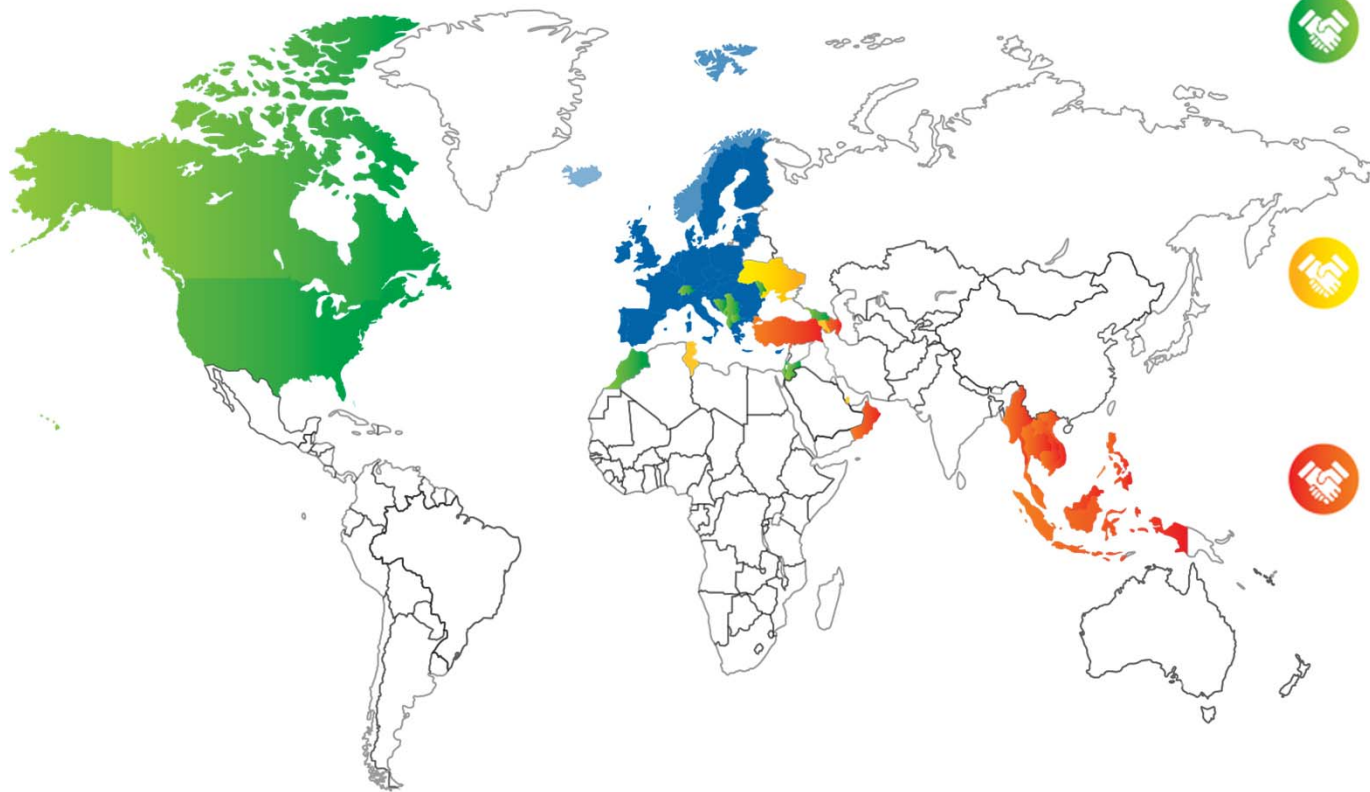
Since 1992

Single Aviation Market



EU External Aviation Policy





Agreements signed

Canada / Georgia / Israel / Jordan / Moldova / Morocco / Switzerland / USA / Western Balkans



Agreements pending signature

Armenia / Qatar / Tunisia / Ukraine



Agreements under negotiation

ASEAN (Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar/Burma, Philippines, Singapore, Thailand, Vietnam) / Azerbaijan / Oman / Turkey



European
Commission

EU Agreements – the benefits



External aviation safety policy

- Bilateral Air Safety Agreements (BASA):
 - ✓ Concluded with major aeronautical partners, such as the USA, Canada, Brazil, China, Japan negotiations ongoing
 - ✓ Reciprocal acceptance of certificates and technical findings

- EASA International relations
 - ✓ EASA is the Regional Safety Oversight Organisation (RSOO) for its member states
 - ✓ EASA assists EU Member States to fulfil their obligations vis-à-vis ICAO
 - ✓ EASA supports BASA negotiations with Third Countries and is responsible for the technical implementation
 - ✓ EASA concludes technical Working Arrangements with Third Countries
 - ✓ EASA performs technical cooperation projects with Third Countries





Thank you for your attention!

