

Air traffic liberalization planning impact evaluation - case study

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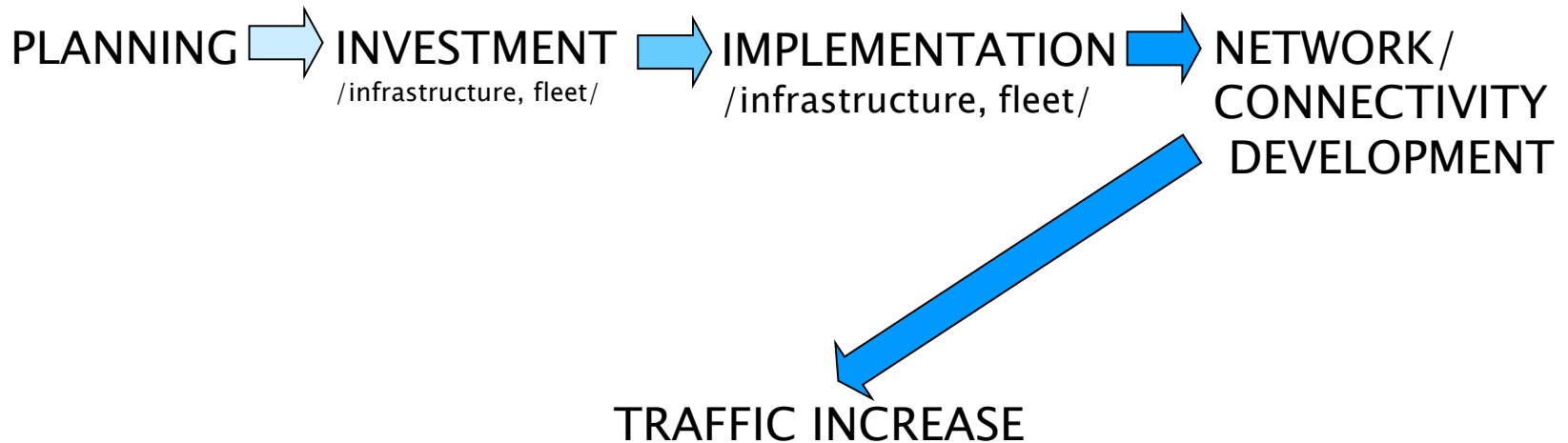
ICAN2015

„Aviation:...no other industry has quite the same mix of five key business ingredients: People, capital, technology, industrial relations and politics”

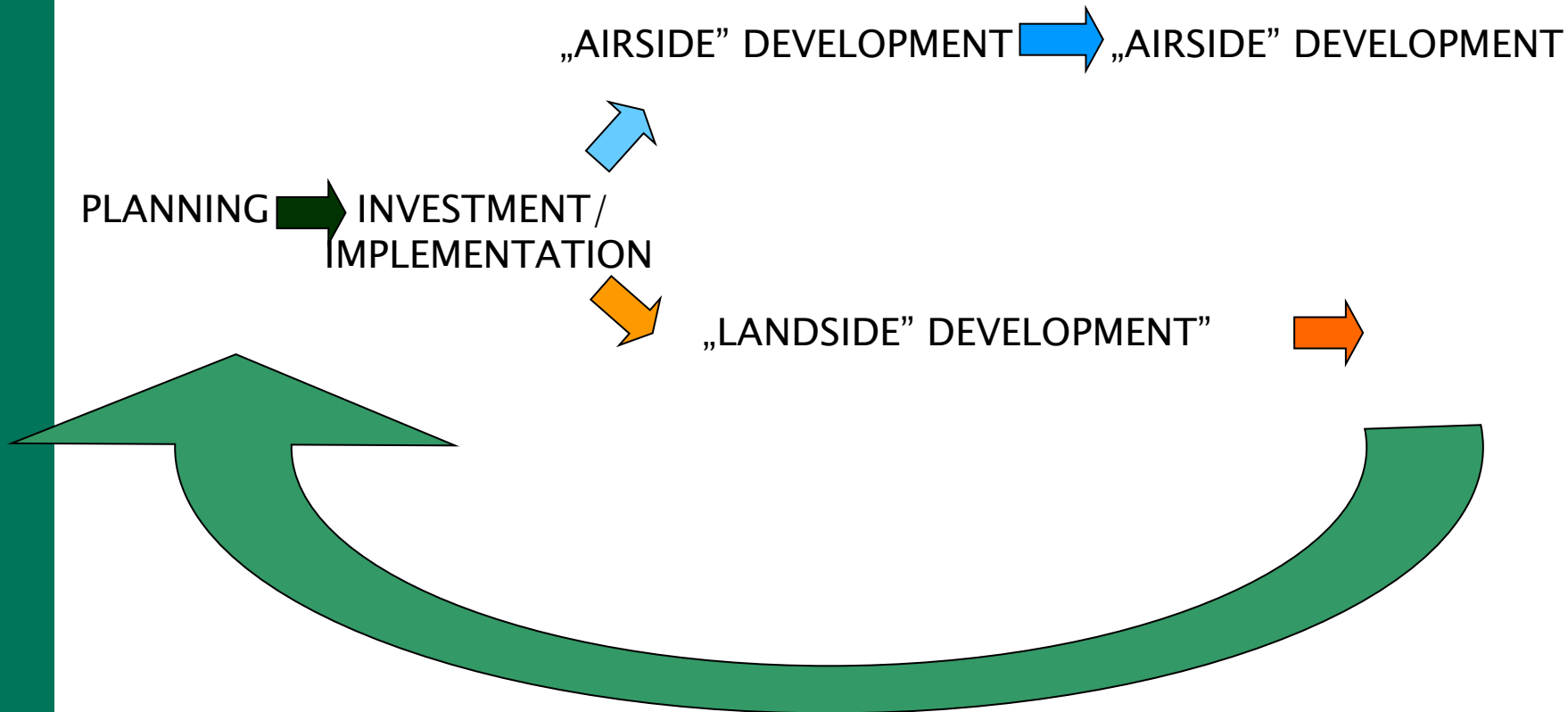
Peter Sutch – former CX Chairman

Aviation Development Planning is a real challenge

„IDEAL" / "MODEL" cycle of strategic planning in aviation
in relation to Airports on the MASTER PLANNING basis
in relation to Air Carriers based on NETWORK DEVELOPMENT PLAN



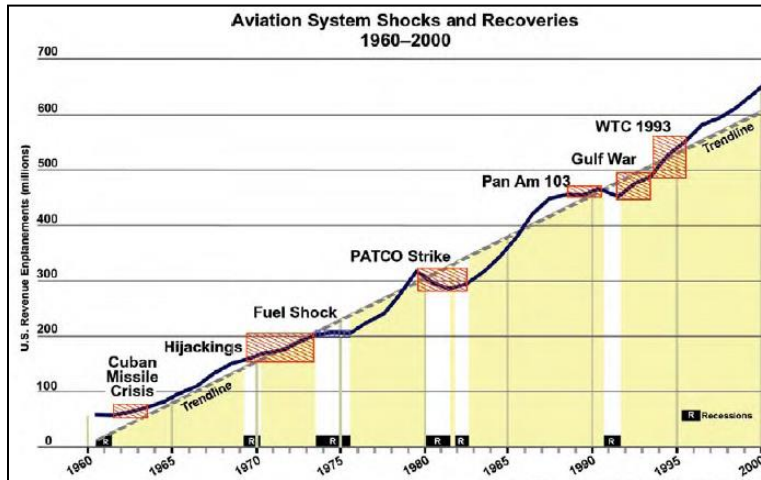
The detailed process of planning and realization of the airport development.



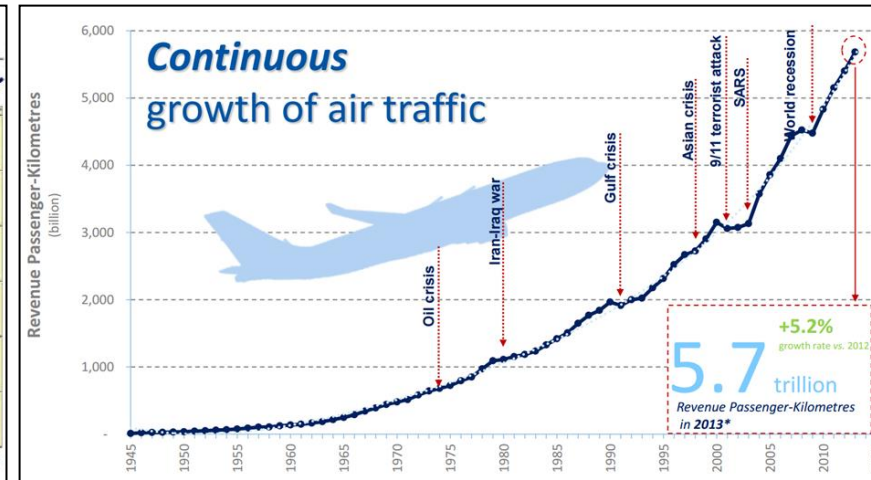
Airport Development Planning – reference documents

- ICAO, International Civil Aviation Organization
Airport Planning Manual, Part 1, Master Planning,
Montreal Canada.
- ICAO, International Civil Aviation Organization
Manual on Air Traffic Forecasting,
Montreal Canada.
- IATA, International Air Transport Association
Airport Development Reference Manual,
Montreal, Canada.
- Federal Aviation Administration (FAA)
Forecasting Aviation Activity by Airport.
Washington D.C.: U.S. Department of Transportation.
- Federal Aviation Administration (FAA)
Advisory Circular 150/5070–6B, Airport Master Plans,
Washington D.C.: U.S. Department of Transportation.

Global Aviation growth over the years demonstrates fast recovery potential after any disturbance and follows stable trend line with increase tendency .



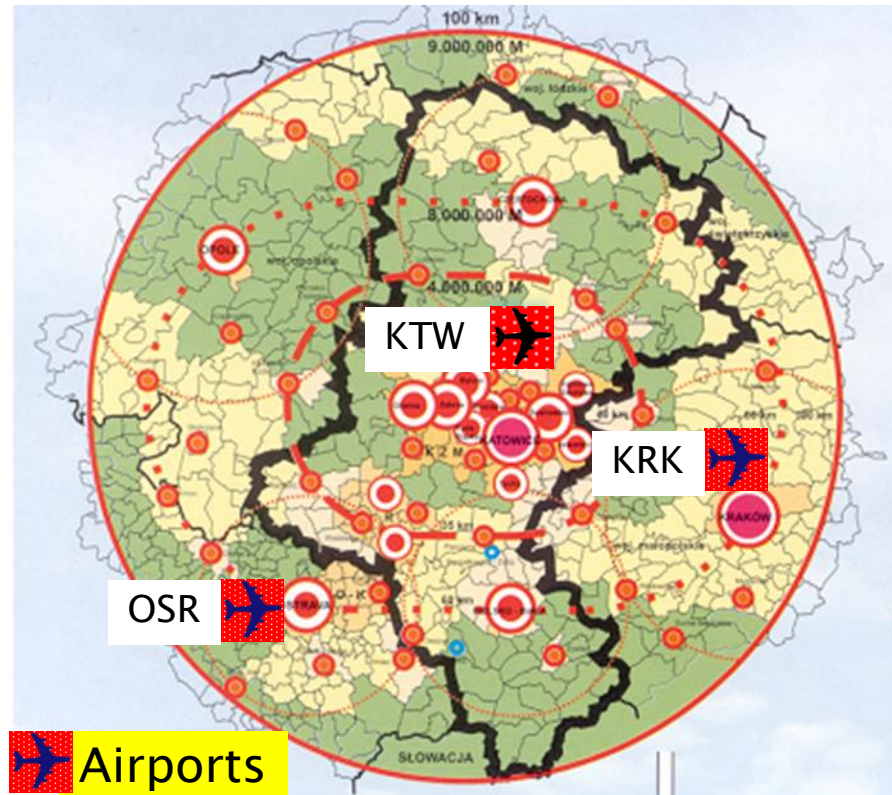
Source: FAA




SOURCE: ICAO IBC2014

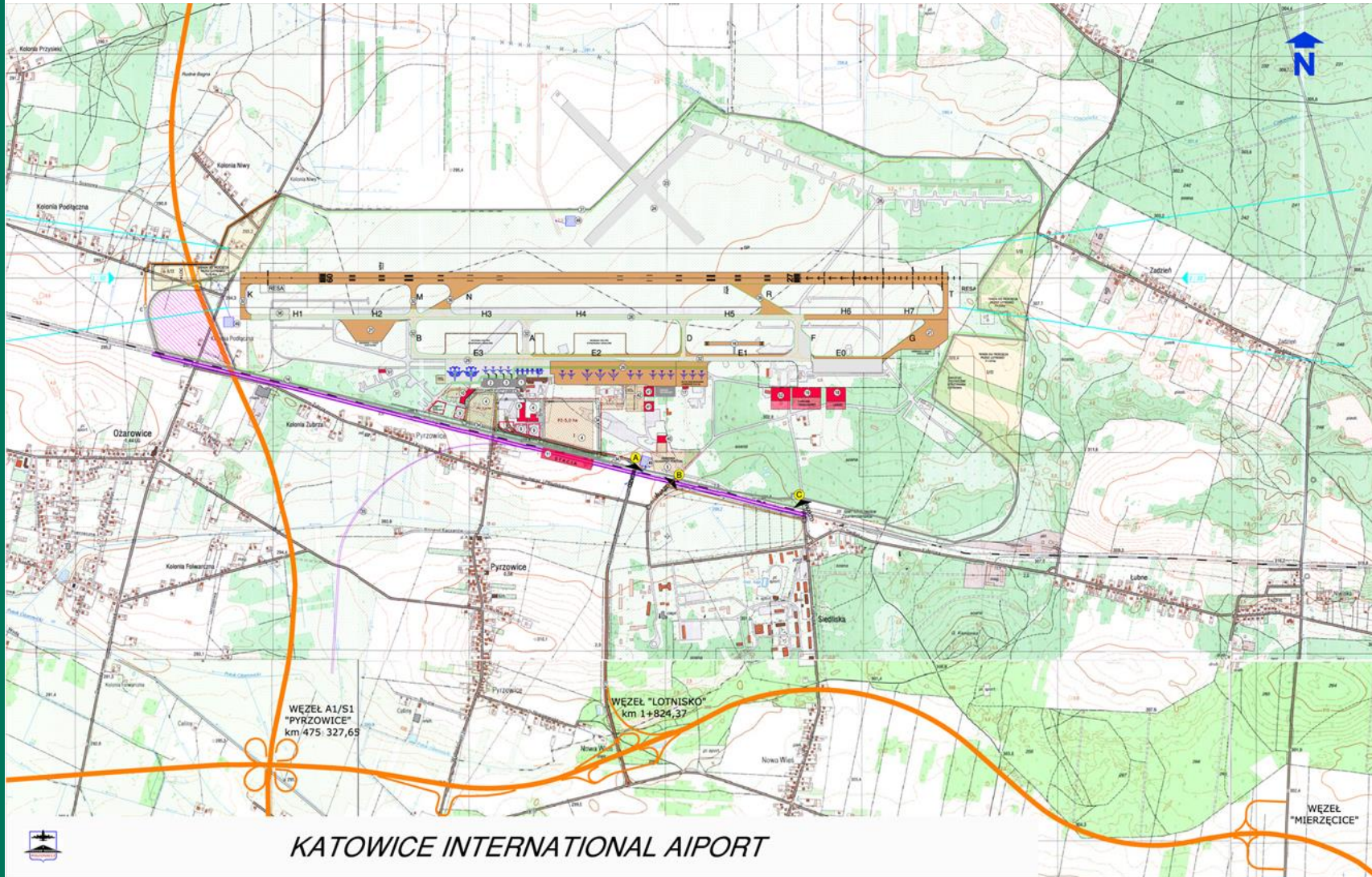
Reality in Aviation can surprise

This case study concerns KTW airport located in the south of Poland, close to the Czech and Slovak borders (9 million inhabitants catchment area, well industrialized region with 2 additional airports nearby)



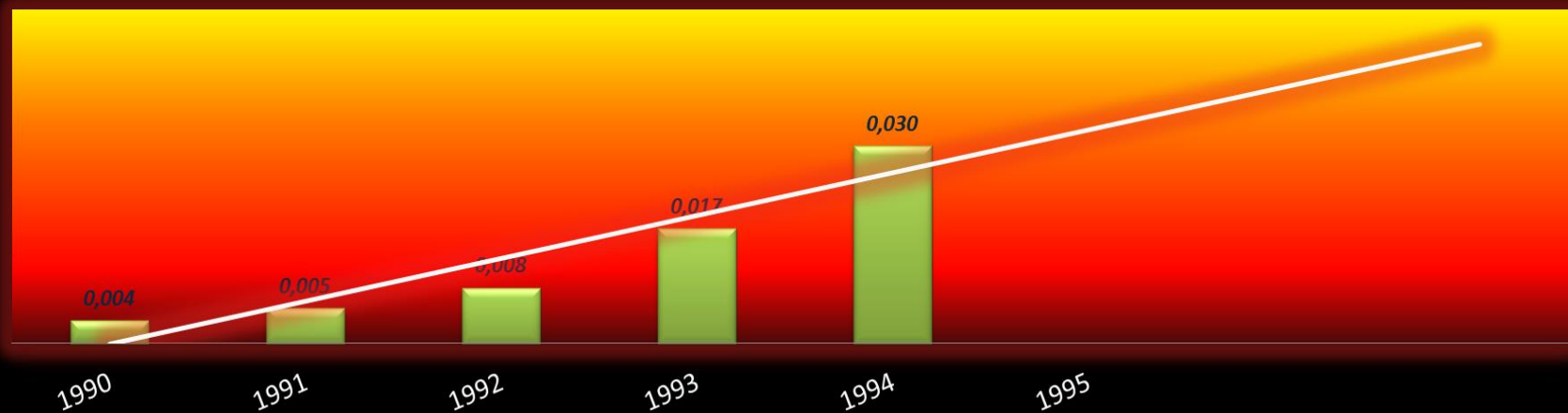
 Airports

Unconstraint airport location (highway and rail link)



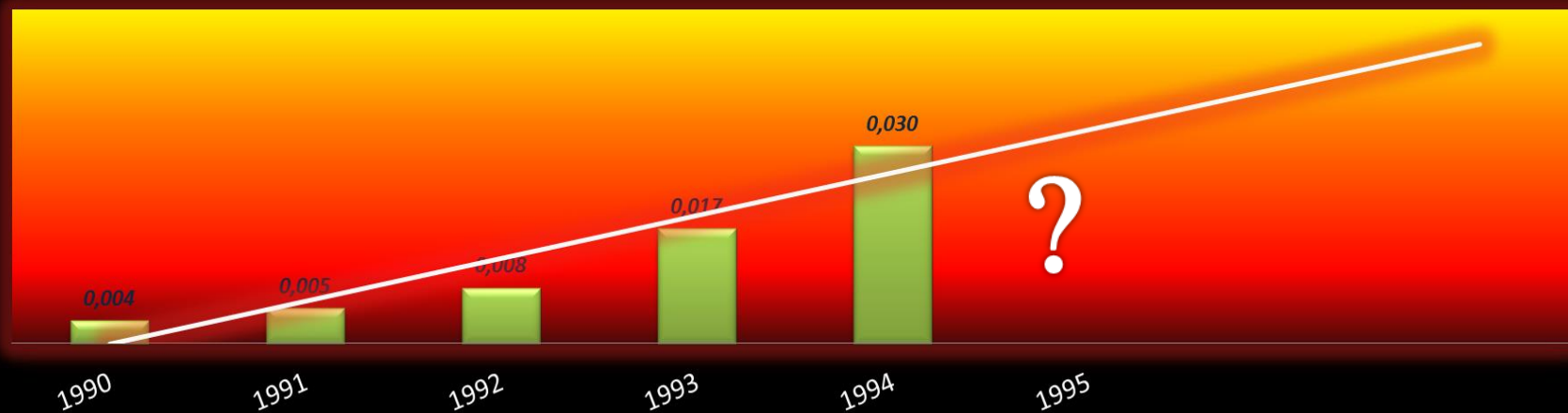
From the beginning of the 90's, (transformation period), civil aviation in Poland is subjected to new calculation model driven by economy. Traffic at KTW airport experiences gradual growth with prompt trend line.

Traffic development 1990-1995 [million pax/year]



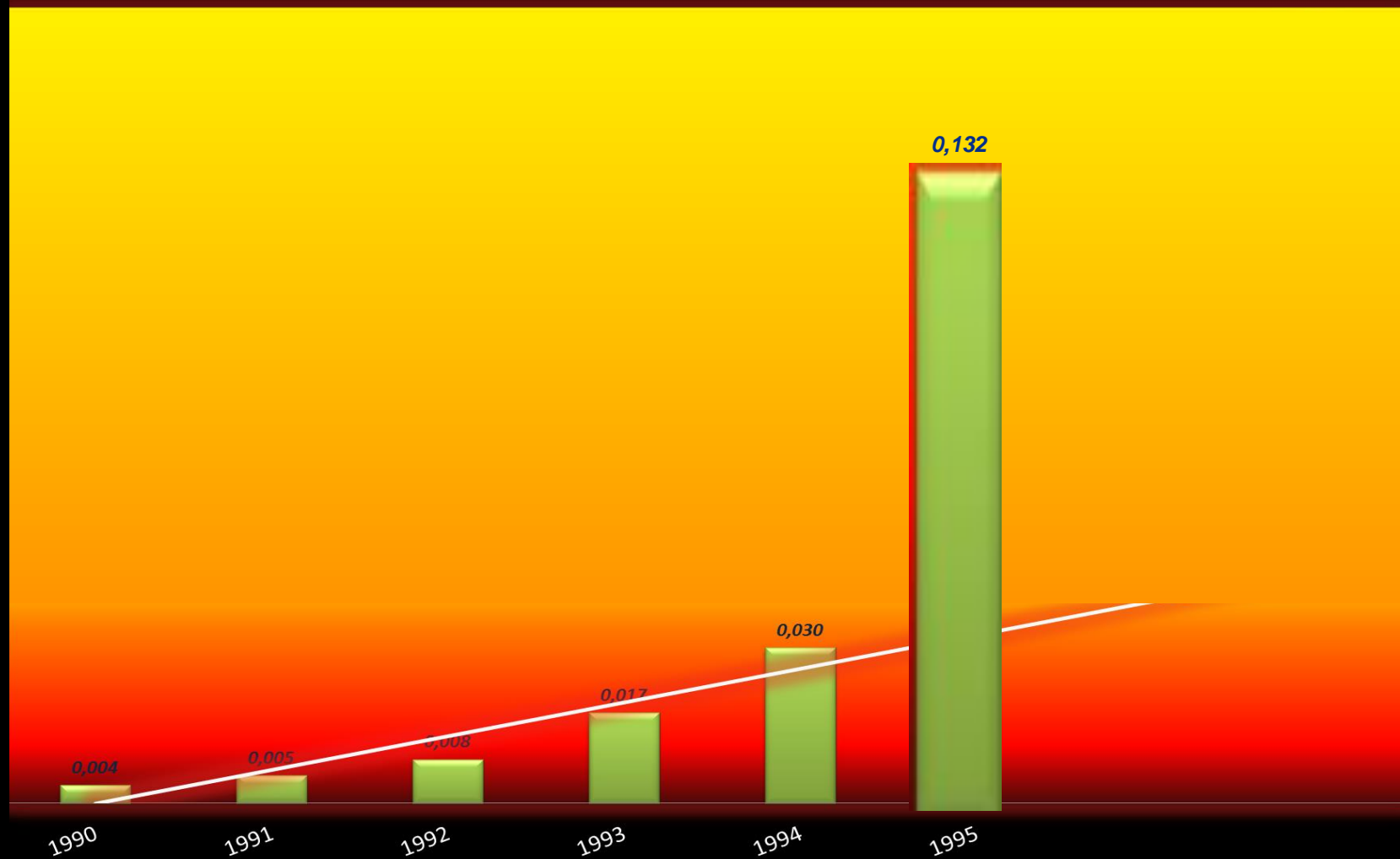
Based on trend analysis short term forecasting was apparently easy task, but the 1995 traffic result was deeply surprising.

Traffic development 1990-1995 [million pax/year]



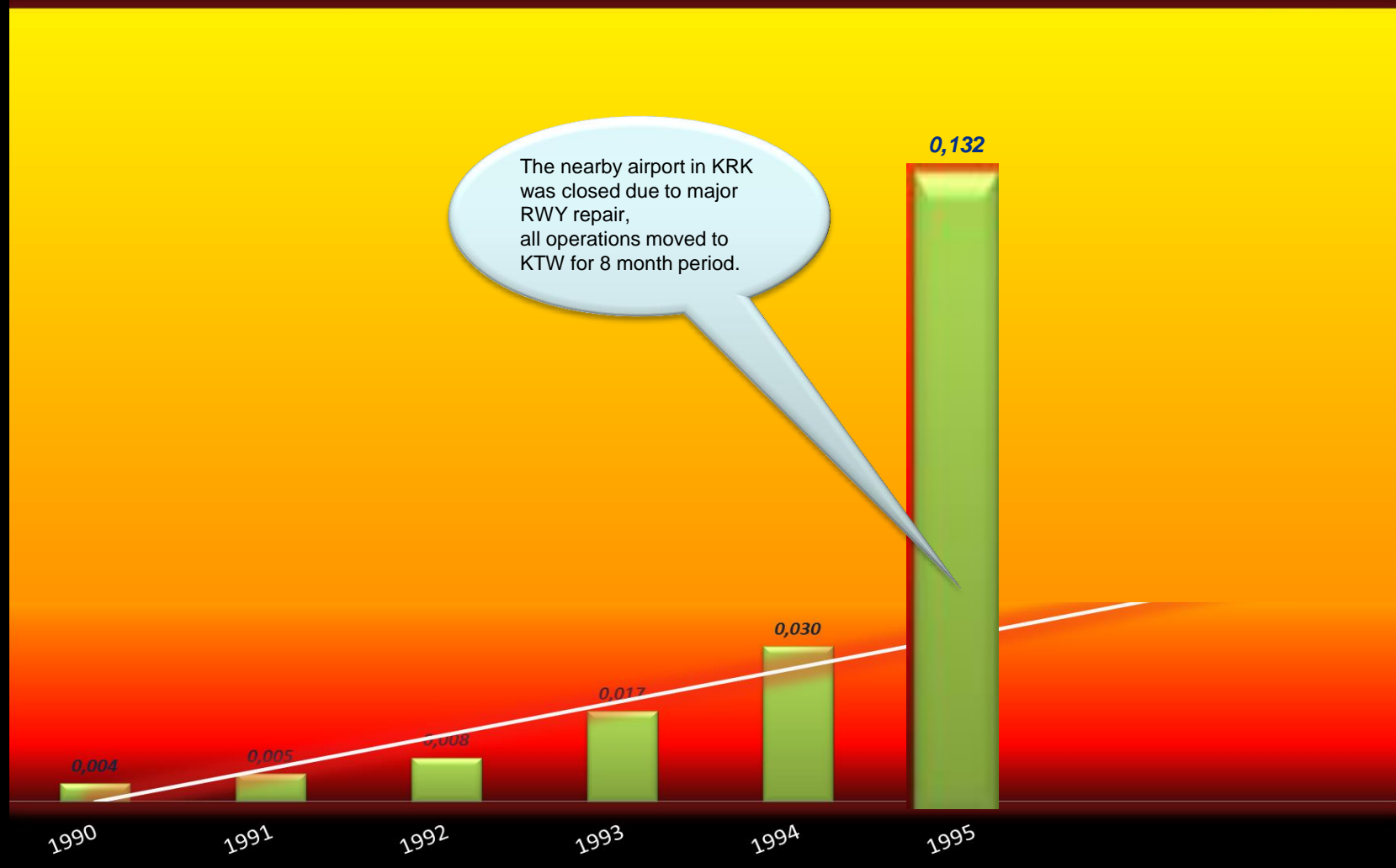
That was really exceptional traffic jump

Traffic development 1990-1995 [million pax/year]

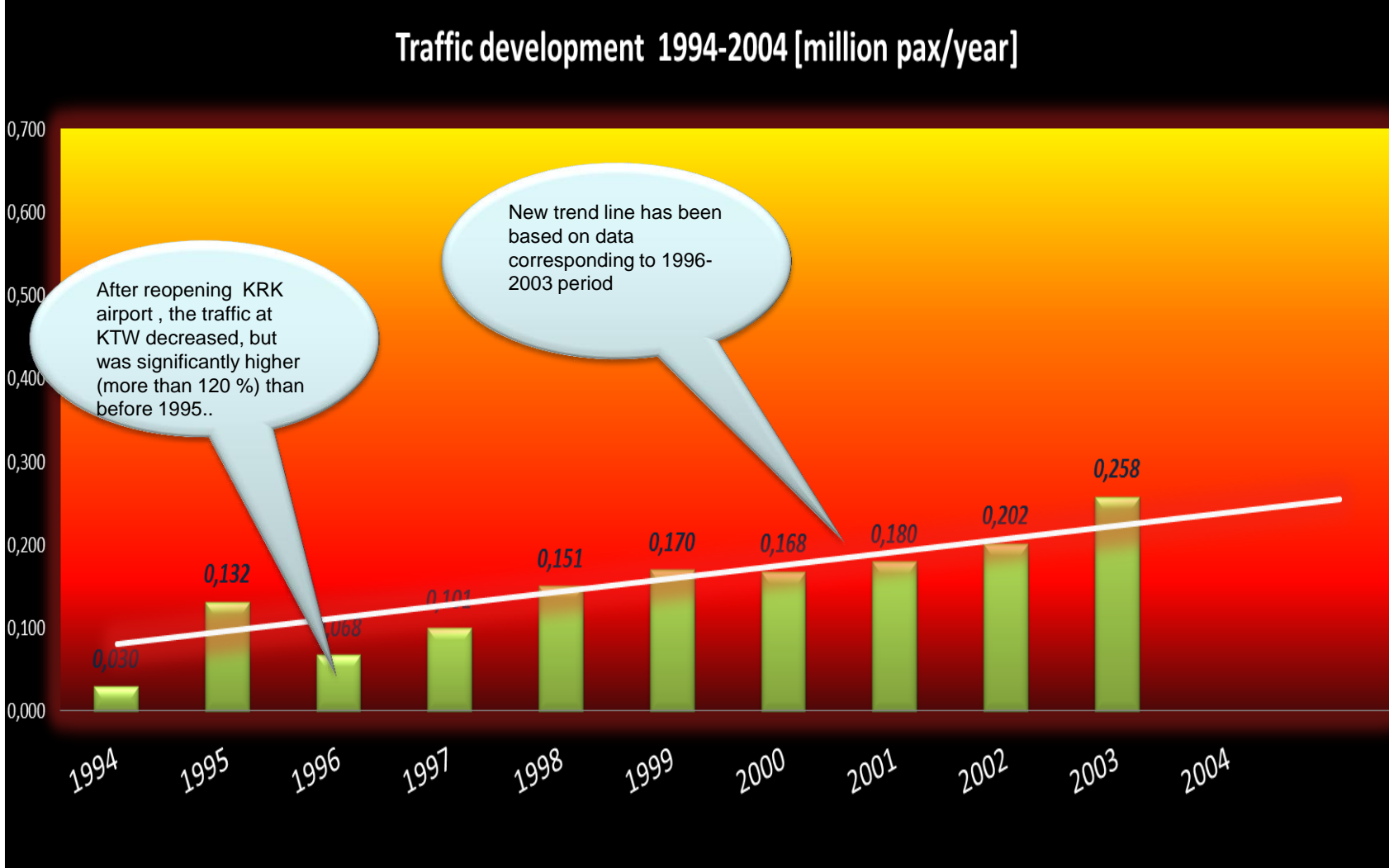


That was really exceptional traffic jump

Traffic development 1990-1995 [million pax/year]



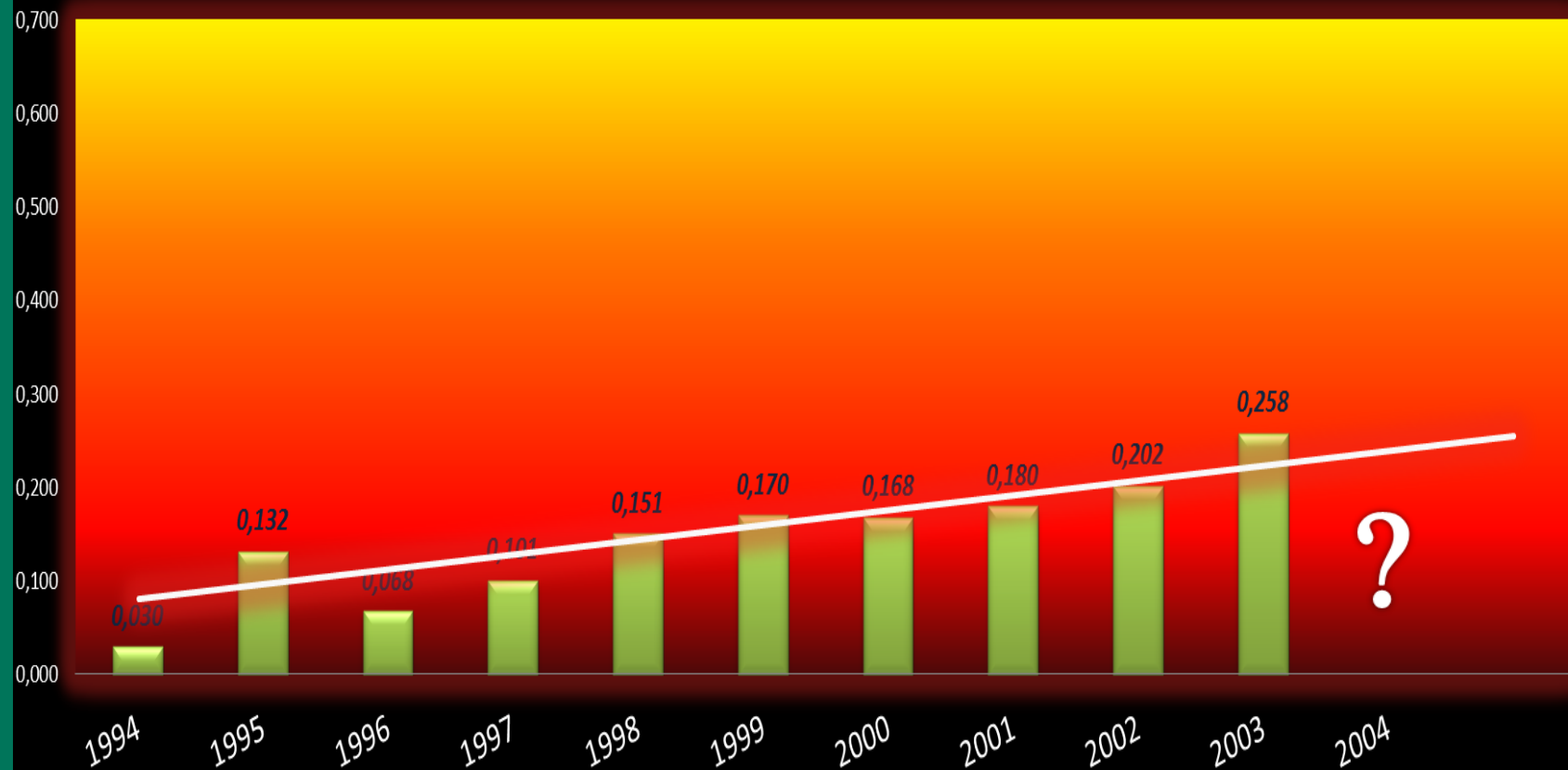
After 1995 KTW gain regional recognition



Now, based on 8 years period, short term forecasting was apparently easy task, but the result was deeply surprising again.



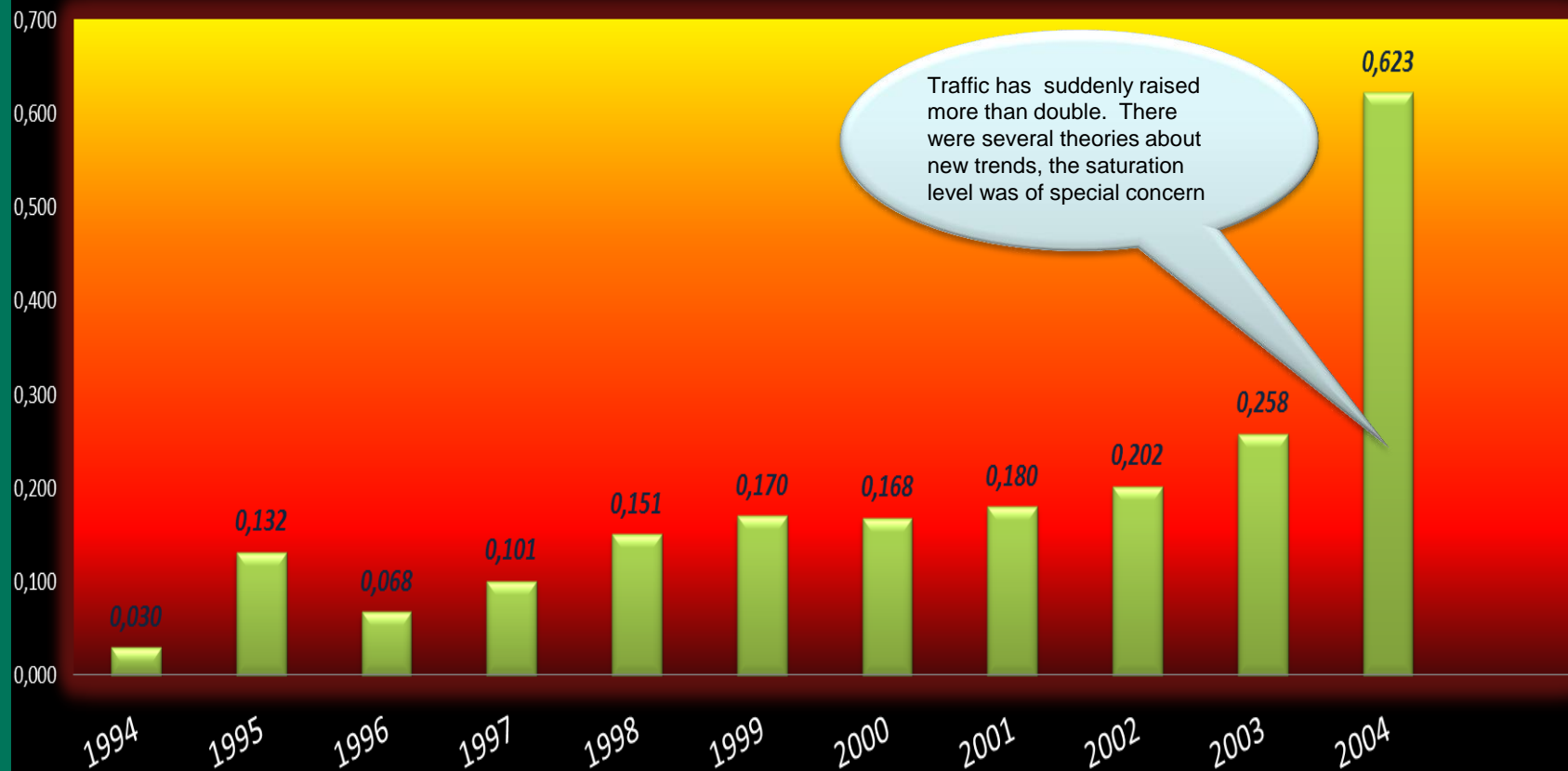
Traffic development 1994-2004 [million pax/year]



Since May 2004 Poland has become EU MEMBER STATE,
the Open Sky is in power,
WizzAIR first home base has been established in KTW.



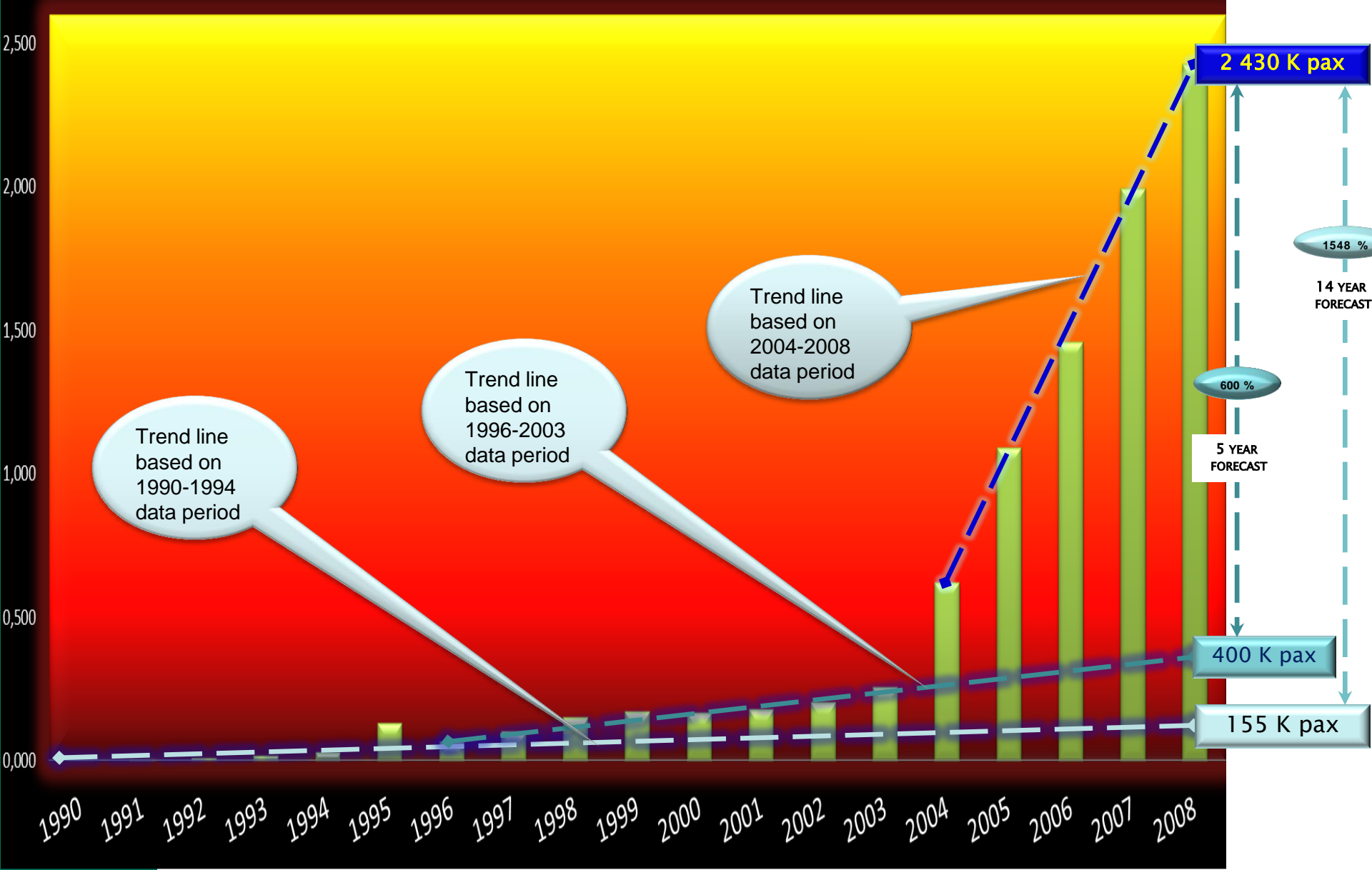
Traffic development 1994-2004 [million pax/year]





Traffic development and trends for KTW airport 1990-2008

The value of air transport liberalization, and global integration



Liberalization of air transport services has contributed to the dynamic and spectacular development of air traffic in Poland and enabled the entry of low-cost carriers into the market.

In 2015 huge development program which included new RWY construction, terminal expansion, and TWY system substantial modification has been completed at KTW Airport. Traffic statistics can be followed at: <https://www.katowice-airport.com/en/airport/annual-statistics>

CONCLUSIONS

- This presentation case shows how complex is long/medium term aviation forecasting.
- The outcome results shows how confusing and unprecise would be to rely always on trend rough projection application to air transport forecasting.
- Traffic development forecasting should take into account all possible local and external impacting phenomena including demand saturation level or unserved demand identification.

ICAO & ICM are jointly working on liberalization value and utilization measurement/evaluation tool

„You can grow up indefinitely,
the other way round only to
disappearance”

S Mozek „The Ambassador”

Many thx for Your kind attention

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