

June 2018

Special Report N°18/2017:

Single European Sky: a changed culture but not a single sky



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What did we look at?



What did we find?



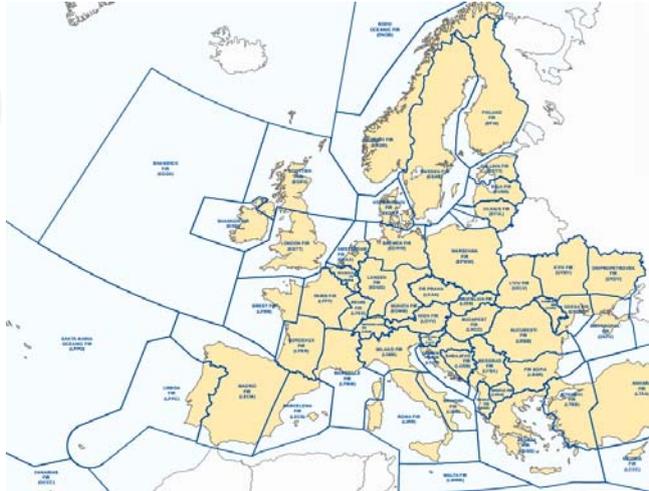
What do we recommend?



What did we look at? (I)

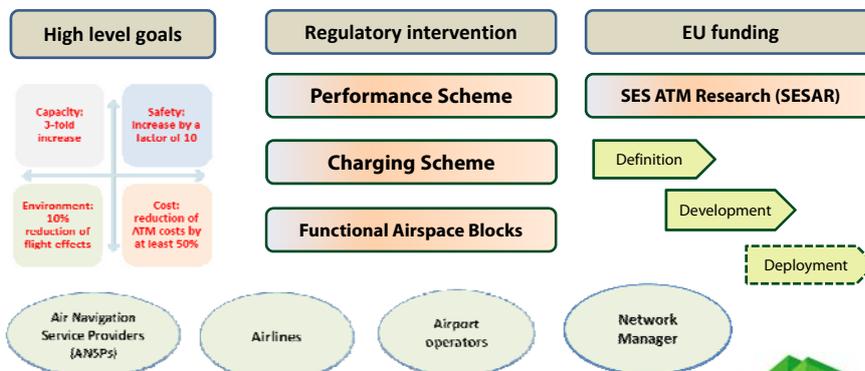
Key features of European ATM

- Fragmented service provision
- National monopolies



What did we look at? (II)

Single European Sky





What did we look at? (III)

Is the EU's Single European Sky initiative resulting in a more efficient European ATM?

- Is the EU's SES initiative well designed?
- Are the SES's regulatory components effectively contributing to a more efficient European ATM?
- Is the SES's technological component (the SESAR programme) making an effective contribution to the performance of European ATM?



What did we find? (I)

The SES initiative was justified

- National monopolies and fragmentation called for EU intervention
- SES: a coherent set of policy instruments
- but High Level Goals (announced 2005) became partly irrelevant and partly unachievable



What did we find? (II)

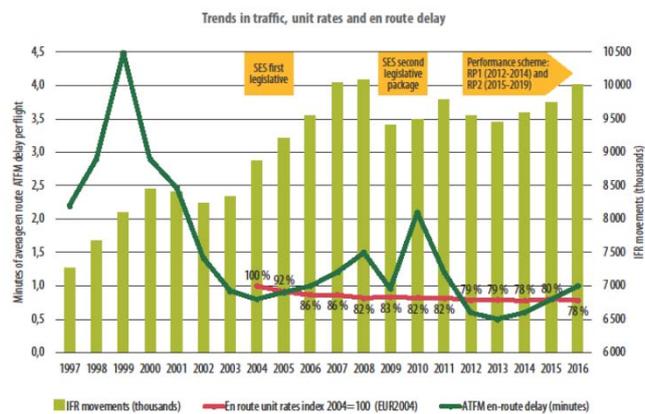
A changed culture, not a single sky

- Performance and charging schemes fostered performance-oriented culture and transparency
- Quantitative results below expectations
 - Delays reached record low in 2013, but started to increase again
 - Reduction of ATM costs below expectations
 - Schemes affected by some shortcomings
- FABs fostered cooperation not real defragmentation



What did we find? (III)

A changed culture, not a single sky





What did we find? (IV)

SESAR: a common vision, now open-ended

- SESAR fostered a common vision and coordination in a previously fragmented R&D environment
- Shortcoming in mandate: what to expect from SESAR JU?
 - SESAR JU (initial termination date 2016) asked to implement ATM Master Plan extending beyond 2020
 - Master Plan updates: progress being measured against a moving target



What did we find? (V)

SESAR: a common vision, now open-ended

- EU intervention in SESAR meant to be limited in time, scope and financial magnitude

Phase	Planned Duration	Planned EU Support
Definition	2005-2007	30 M €
Development	2007-2013	700 M €
Deployment	2014-2020	None

- Master plan updates: R&D programme re-scoped, performance ambitions delayed from 2020 to 2035
- R&D in Master Plan still a long way from completed
- SESAR now an open ended project
 - SESAR JU extended till 2024, granted additional 585 million €
 - EU also supporting deployment (Connecting Europe Facility earmarked up to 3 000 million €)



What do we recommend? (I)

In respect of the regulatory framework:

- 1** Review High Level Goals
- 2** Analyse other policy options targeting fragmentation
- 3** Ensure full independence and capacity of NSAs
- 4** Ensure inspection coverage of the charging scheme
- 5** Streamline the performance scheme
- 6** Review certain key performance indicators



What do we recommend? (II)

In respect of the EU's support to SESAR:

- 7** Review the EU's support structure to ATM R&D
- 8** Reinforce the accountability of the SESAR JU
- 9** Prioritize EU support to R&D solutions that promote defragmentation and a competitive environment

**Thank you
for your attention!**

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