DOPRAVNÝ ÚRAD
TRANSPORT AUTHORITY

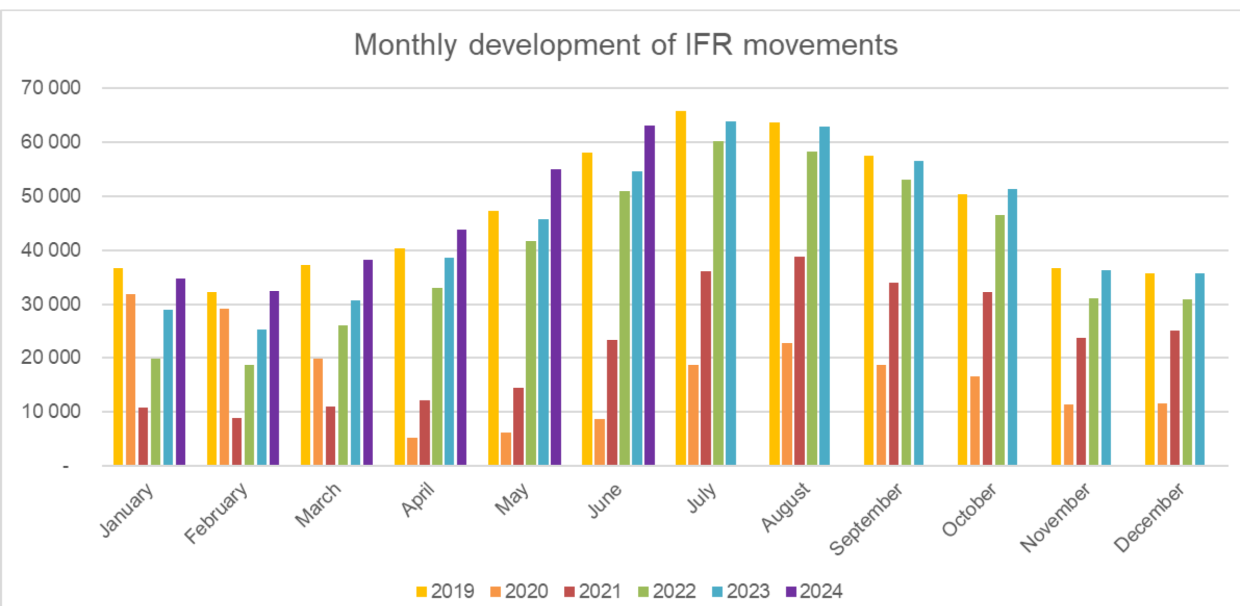
Draft RP4 Performance Plan for Slovakia

Annex D: Justification for the local traffic forecast and implications for the capacity requirements

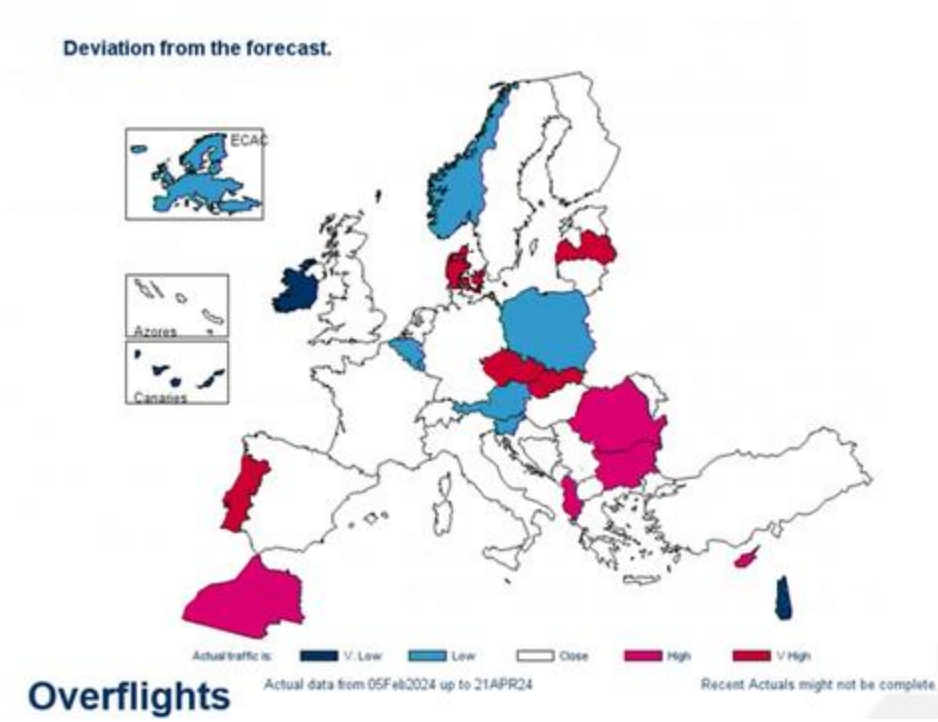
Slovakia was one of the countries that have been hit strongest in terms of the loss of traffic during the COVID-19 pandemic. Nevertheless, LPS SR continued to adapt the recruitment and training process of ATCOs in order to not only meet the changed capacity demands for RP3 but also to prepare for the presumable increase in the capacity demand in RP4. This was the right decision given how the situation evolved after the Ukrainian war started in February 2022. In 2022, Slovakia faced 33.9% higher demand in terms of IFR flight movements compared to the RP3 performance plan. In 2023, the actual traffic was 25.6% higher than originally planned and the latest STATFOR Base forecast from February 2024 projects that Slovakia will be 15.4% above the RP3 planned traffic in terms of IFR movements at the end of RP3.

The latest development however shows even a much quicker recovery of IFR movements in Slovakia. In the first 6 months of 2024, there was a growth of 19% compared to the same period in 2023 and this suggests around 633 thousand of IFR movements in 2024, taking into account the relative proportion of Jan-June traffic in the previous years. This would be even significantly higher than 573 IFR movements suggested by the STATFOR High Scenario from February 2024.

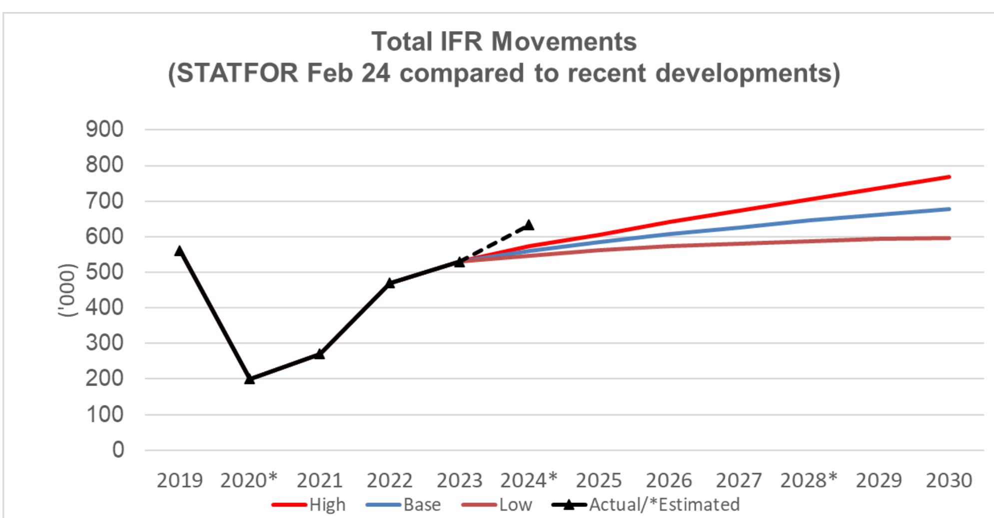
The following chart summarizes the monthly development of the traffic in 2019-2024 and the significant growth we are facing this year.



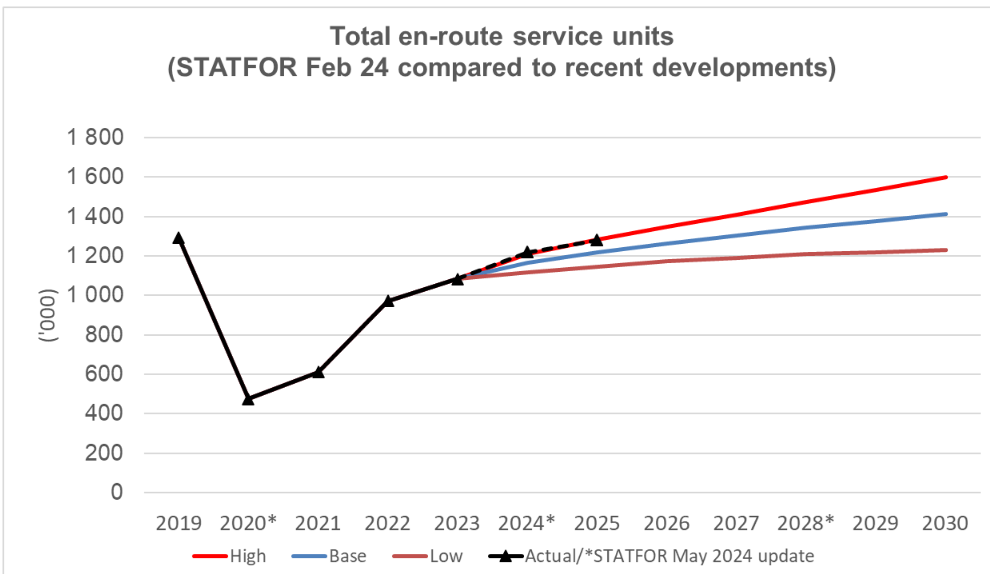
This has been also confirmed by EUROCONTROL at the recent Enlarged Committee meeting. For Slovakia, the deviation from the STATFOR February Base is significant and is a result of rerouting associated with the conflict in Israel.



The following chart compares the actual development and implied number of IFR movements (should the traffic continue to increase like in the first 6 months of 2024) with the STATFOR's February 2024 scenarios. The implied number of IFR movements is significantly above the STATFOR High scenario for 2024.



The following chart shows the STATFOR's February 2024 forecasts for en-route service units together with the latest STATFOR May update for 2024 and 2025 which are both aligned with the STATFOR's February 2024 High scenario. Given that EUROCONTROL confirmed at the Enlarged Committee that the total service units growth is often higher than flight growth in the Central-Eastern part of Europe and given that the growth of IFR movements is even higher than what is suggested in the STATFOIR's May update of the service units, the actual development of the TSU growth will almost certainly be even higher compared to the STATFOR High scenario from February 2024.



We do not consider STATFOR Base scenario from February 2024 as valid anymore and have used STATFOR High scenario from February 2024 as a basis for the planning. In addition, the STATFOR High scenario suggests that LPS will need to cope with additional 28% traffic increase in terms of IFR movements by the end of RP4 compared to 2024.

We have also used the STATFOR High scenario from February 2024 for the en-route service units.

In terms of the implications for our capacity, we can already observe a capacity gap, as was first suggested in the LPS capacity plan in the LSSIP 2022, which included also an assessment in case of application of the STATFOR High Scenario from Oct 2022 (predicting 620 thousand IFR movements in 2024). This assessment by EUROCONTORL suggested a capacity gap of 3-4% in 2023-2024. The estimated 2024 traffic in terms of IFR movements will be even above this original forecast which has an impact on increasing the capacity gap. The increase can be observed especially during the night shifts, which require more sectors to be open during longer hours.

LPS therefore needs to recruit and train additional ATCOs to cope with the high traffic forecast and we consider the additional ATCOs needed as an inevitable measure to achieve the en route capacity targets. In addition to additional costs for ATCOs-in-OPS, there are also related training costs. Our failure rate is currently around 47% which has been factored in.

In addition, we need to plan investments into the new ATM system and ATM/ANS Resilience Technology & Infrastructure which (in addition to other inevitable operational requirements) are also prerequisites for further growth of the capacity to enable meeting the ATFM delay targets not only in RP4 but also beyond. The costs of these major investments are considered as measures necessary to achieve en route capacity targets.

The costs of these additional capacity measures have been estimated and are included in Section ‘3.4.9 Add. capacity measures’ of the submitted draft RP4 Performance Plan for Slovakia.