



## Air traffic and logistics development in the EU rural areas

TNC PROJECT – Submeasure 19.3

A shared methodology for an intelligent  
growth of airports in rural areas

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This document is a manual for carrying out the feasibility studies. Its scheme and table of contents are the ones planned for the study itself; instead, the text in the chapters (including those in the form of tables) need to be read as guidelines for the activities leading to the achievement and/or elaboration of the content of the studies. Therefore, these tables need not to be filled in by the LAGs but need to be read as “instructions”.

The following chart recaps the logical articulation of a development plan and feasibility study for the airport. The final aim is to define a realistic and convenient investment plan as well as possible soft measures that are able to unlock/fuel the airport development, after having analysed the current situation and the potential connections and having compared the two scenarios in order to point out the current gaps and having defined the necessary steps for fulfilling the airport vision.



**In this version, the guidelines are presented up to Chapter 2. The following Chapters (3 and 4) will be completed after the first phase of data collection, in order to provide customised guidelines for each involved airport, according to their specific characteristics and outlooks.**

# 1. ANALYSIS OF THE AIRPORT AND ITS TERRITORIAL CONTEXT

This chapter has the aim to describe the airport, its infrastructural and operating features, and its catchment area.

A number of information and data are to be collected by means of either desk research or direct questions to stakeholders. By retrieving such info, it will be possible to fill the following sections of the chapter:

## 1.1. LOCATION OF THE AIRPORT AND SURROUNDING CONTEXT

Info to be retrieved	Type of source	Detail about the source	Notes
<b>Q1.1 Where is the airport located? What is the main economic characteristic of the region?</b>	Desk research	-	Map with comments. Describe the area (province, region) with a presentation of the main socio-economic characteristics and trends (population and economy).
<b>Q1.2 What is the natural catchment area of your airport?</b>	Desk research	-	Your airport's natural catchment area may differ from the administrative division (e.g. province/region) in which it is located. The natural catchment area is defined as the grouping of the territories located within a certain threshold of distance, measured by the transfer time to the airport (usually within 3 hours). In this section, find and list such territories and characterise them with their population, Gdp and, if possible and relevant for your scope, number of yearly incoming tourists.
<b>Q1.3 What are the nearest airports, in the main directions served by the road/rail network?</b>	Desk research	-	Use Google Maps or the likes to find minimum distances by road or rail to airports. Display a map centred on the concerned airports and with markers and lines with indication of the distances, connecting the surrounding airports. If none, just show in the map a straight line connecting the airport to least far, with the indication of the distance.

Info to be retrieved	Type of source	Detail about the source	Notes
<b>Q1.4 Which of these airports are competitors for your airport?</b>	Desk research / Questions to stakeholders	Tour operators may help to define the attractiveness of various airports vs the outbound touristic demand	Inside your catchment area, the different territories may be attracted to one of your competitor airports. At this stage, for each zone, we can assume that the competition relies mainly on the transfer durations between the main cities/nodes of the zones and the competing airports, which in turn depend on geographic and infrastructural features. Therefore, your airport must be compared with other surrounding airports that can offer the same level of service or higher. A surrounding airport can be considered a competitor if: <ul style="list-style-type: none"> <li>- it is located within max 3 hours from a territory within your natural catchment area;</li> <li>- it is operating with a similar or higher intensity (e.g. a higher number of yearly passengers, or tonnes, or movements) as your airport.</li> </ul>
<b>Q1.5 Are there railway stations served by long-range trains? Are there any dedicated rail services for goods? Are there connections by other means of transport (e.g. maritime) that can be considered competitors to air mode?</b>	Desk research	-	Describe the potential competition by other modes: what connections do they offer for what destinations, currently and possibly in the future?

## 1.2 CURRENT INFRASTRUCTURE AND OPERATING CHARACTERISTICS

Info to be retrieved	Type of source	Detail about the source	Notes
<b>Q1.6 Collection of historical traffic data for passengers</b>	Questions for stakeholders	Managing company of the airport	Present the most recent traffic data, if present (ideally, for the last 5 operational years), in terms of movements, passengers, tons of freight (where relevant), with details by: <ul style="list-style-type: none"> <li>- Flight category (scheduled, charter, business, cargo, general aviation)</li> <li>- Airline</li> <li>- Origin/destination airport</li> </ul> If possible, request data on the final destination of passengers using hubs for connections. This is possible when passengers check-in their luggage for the whole trip to the final destination beyond the connecting hub (e.g. Your airport -> Frankfurt -> Final destination)
<b>Q1.7 How long is the runway?</b>	Questions for stakeholders	Technical department of the Airport managing company	This set of questions is aimed at (1) describing the airport infrastructure; (2) analyse the most important features for defining its current potential air transport supply in terms of maximum range of action of an aircraft departing/arriving to the airport.
<b>Q1.8 How is the orientation of the runways with respect to the winds?</b>			
<b>Q1.9 Are there other facilities inside the airport, for example hangars?</b>			
<b>Q1.10 What is the maximum range of action of a plane arriving/departing from the airport?</b>			
<b>Q1.11 What is the maximum capacity, in terms of weight bearable, for the landing strip?</b>			
<b>Q1.12 Which is the maximum airplane size that can operate in the airport?</b>			
<b>Q1.13 What are the operating hours for the airport?</b>			

## 2. ANALYSIS OF THE POTENTIAL DEMAND OF TRANSPORT

This chapter aims to identify the main local stakeholders, public and private, as well as the logistics environment and assess the potential transport operations for the airport for both passengers and goods.

### 2.1 RELEVANT STAKEHOLDERS IN THE CATCHMENT AREA

Info to be retrieved	Type of source	Detail about the source	Notes
<b>Q2.1 Who are the main local stakeholders potentially interested in the development of the airports? What are their roles and their outlook?</b>	Questions for stakeholders	Each LAG will identify the relevant stakeholders for its area and airport.	<p>This step aims to identify the main stakeholders identified, with respect with the airport's development. In general, the following bodies may be involved:</p> <ul style="list-style-type: none"> <li>- Chambers of commerce or similar bodies</li> <li>- Industrial associations</li> <li>- Public Authorities (municipal, regional, national level)</li> <li>- Touristic operators</li> <li>- Universities/research centres</li> <li>- Associations of forwarders</li> </ul> <p>It may help to scan for existing studies concerning the airport, as most of the times the entities commissioning those studies have direct or indirect interest in the airport's development. This set of questions will need to investigate what are the stakeholders':</p> <ul style="list-style-type: none"> <li>- Roles with respect to the area and to airport's development;</li> <li>- Views and possible interests in the airport's activity and air connections.</li> </ul>
<b>Q2.2 Who are the most interested in incoming passenger traffic? What category of services are relevant for them (scheduled/ charter/ business/ private)?</b>	Desk research / Questions for stakeholders		These questions can be answered by desk research, but stakeholders may be able to offer quantitative details (flows of people and goods generated).
<b>Q2.3 What are the most attractive landmarks or traffic generators?</b>	Desk research / Questions for stakeholders		Quantitative details (potential pax to/from the airport per destination, per season, per trip purpose) are necessary for the estimation of the desirability and potential feasibility of a connection.
<b>Q2.4 Who are the most interested in outgoing passenger traffic? What category of services are relevant for them scheduled/ charter/ business/ private)?</b>	Desk research / Questions for stakeholders		

Info to be retrieved	Type of source	Detail about the source	Notes
<p><b>Q2.5 Who are most interested in export freight transport?</b></p>	<p>Desk research / Questions for stakeholders</p>		<p>Air cargo business is peculiar. Only a small share of goods is potentially attractable to the air transport mode, namely those goods for which shippers are willing to pay the high cost (compared to other modes): normally only high-value goods (high tech, high value machinery, fashion, pharmaceutical) or time-sensitive ones (instrumental goods in just-in-time logistics chains; or express courier deliveries).</p> <p>For the same economic reason, only a high concentration of flows will allow to achieve a level of demand which justifies the high costs of air cargo production; for lower demand, it will always be more convenient to carry goods with other transport modes to bigger hubs. Please consider these principles as guidelines when addressing dialogue with potential stakeholders interested in a cargo expansion of the airport business.</p> <p>Quantitative details (potential tons of goods to/from the airport, per destination, per week) are necessary for the estimation of the desirability and potential feasibility of a connection.</p>
<p><b>Q2.6 What other activities have a relevant interest for local stakeholders (agricultural, firefighting, flight school, civil protection, etc)?</b></p>	<p>Desk research / Questions for stakeholders</p>		<p>Requirements for airport development may derive from specific local features.</p>

## 2.3 POTENTIAL DEMAND

Info to be retrieved	Type of source	Detail about the source	Notes
<b>Q2.7 What are the passengers and freight needs of the territorial context, both outgoing and incoming?</b>	Desk research	-	This set of questions needs to be answered by putting together the answers to the previous chapter and elaborating its quantitative details.
<b>Q2.8 What are the origins and destinations more significant or necessary for the connecting service?</b>	Desk research	-	
<b>Q2.9 What connections, and with what operating features, are potentially desirable for the airport in the category of scheduled commercial flights of short range and middle/long range?</b>	Desk research	-	
<b>Q2.10 What connections, and with what operating features, are potentially desirable for the airport in the category of economically supported low cost flights?</b>	Desk research	-	
<b>Q2.11 What connections, and with what operating features, are potentially desirable for the airport in the category of chartered leisure flights?</b>	Desk research	-	
<b>Q2.12 What operating features are potentially desirable for the airport in the category of civil aviation, business flights and aeroclub?</b>	Desk research	-	
<b>Q2.13 What operating features are potentially desirable for the airport (agricultural flights, firefighting, flight school, civil protection, etc)</b>	Desk research	-	

### 3. ANALYSIS OF THE CURRENT OPERATING POTENTIAL

The guidelines for this chapter will be drafted after the completion of the data collection in the previous phases, in order to being able to provide customised indications according to each airport's analysis.

#### 3.1 FEASIBLE OPERATIONS

The aim of the chapter will be to elaborate the information and data emerging from the previous chapters in order to define the characteristics of the potential operations in the airport by comparing those of the desired ones to the currently feasible ones.

## 4. ANALYSIS OF THE GAPS FOR THE DEVELOPMENT OF THE AIRPORT

The guidelines for this chapter will be drafted after the completion of the data collection in the previous phases, in order to being able to provide customised indications according to each airport's characteristics.

The aim of the chapter will be to:

- to fully define the vision emerging from the analyses and the stakeholder consultation, and to recap the desired and currently feasible operations (par 4.1)
- to define the necessary steps, either in terms of structural developments or soft measures/policies, in order to achieve the pre-conditions for the growth of the airport operations according to each airport's defined vision and (par 4.3 and 4.3)
- to analyse the costs of the interventions defined in the previous step; to estimate the projections of economic returns for the airport deriving from the implementation of the development plan; and to compare the two flows in order to assess the conditions of feasibility of the plan itself.

### 4.1 DEFINITION OF THE ROLE OF THE AIRPORT

Tbc

### 4.2 CURRENT LIMITS CAUSED BY ORGANIZATION AND REGULATIONS

Tbc

### 4.3 DEFINITION OF INFRASTRUCTURE GAP AND NECESSARY DEVELOPMENTS

Tbc

### 4.4 ECONOMIC FEASIBILITY

Tbc