

TRENDS IN AIR TRAFFIC BETWEEN THE WESTERN BALKANS AND NORTH EASTERN ITALY

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The air transport sector in the Balkans has grown significantly in recent years in terms of business turnover, taking a major step forward. The region has experienced a quantitative increase in the number of civilian flights (i.e. flights transporting passengers and freight). At the same time and as a result of this, the area's technological infrastructure (airports, flight control systems, airplanes, etc....) has improved decisively compared to the late 1990s and the early 2000s. Thus the capabilities of the Balkan airport system have been able to improve such that they are an attractive market for foreign investors, and at the same time are becoming more important on a continental and European level. The goal of Balkan governments in developing their airport systems has been to create commercial links in this sector with the European Union and more generally with western Europe. This has occurred on two distinct but complementary and simultaneous levels. The first level is that of

the area's individual leaders, who have successfully raised the attractiveness of their respective airport markets for foreign investors and have decisively channeled extensive efforts in terms of marketing, business strategy and public investment, towards the west. The second level of significant policy has been regional. In fact this sector's emergence has occurred in the context of a broader institutional mobilization aimed at promoting economic growth in the Balkans by linking it mainly to the direct and indirect support of western Europe and EU institutions. The recent growth in numbers of passengers and airline connections in the region is the result of an economic trend common to all Balkan countries, that is, the orientation of domestic markets towards the EU's founding members. This was planned by the region's authorities and political and economic powers with the knowledge that their economic progress was and still is inextricably linked to western markets and investment. These structural economic dynamics are reflected in trends in air transport, which showed an increase of 130% in the number of flights between western Europe and the Balkans from 2001 to 2007.

For geographical reasons, the propensity demonstrated by Balkan countries to integrate their aviation markets into the wider European system is particularly evident in the western Balkans. Croatia, Montenegro and Albania in particular have pushed to increase air traffic with the western part of the continent. In this sense Italy is an ideal destination for these countries' civil aviation in terms of both a starting point for expanding trade with the rest of the European Union, and as a target market for rapidly raising air traffic frequency. Indeed, current economic conditions are forcing the Balkan countries to rely on the development of international contacts outside the region rather than on the prospects for air traffic within the Balkan area.

Among the connections established between airports in the western Balkans and Italy, the coast of northeastern Italy and the Italian regions of that area are currently the

most significant. There are three main reasons behind this economic and commercial trend.

In the first place there has been an increase in Italian companies' commercial traffic with the western Balkans. In this case historical reasons as well as the recent economic-financial situation are responsible for the growth of Italian exports to these countries as well as Italian investment across the Adriatic. In the last ten years numerous Italian firms have set up branches or factories in the western Balkans. In addition, Albanian and Croatian exports have risen markedly to Italy.

Secondly, air traffic between the two locations has been boosted by immigration-related movement from Albania, Macedonia and Montenegro between the two sides of the Adriatic at various times of year. The arrival in northeastern Italy over the last fifteen years of significant numbers of immigrants from ex-Yugoslavia seeking work reasons has created a strong and significant relationship between the two geographical areas, which can be seen in the frequent travel back and forth (for family and personal visits, for administration reasons, etc.) making up a considerable portion of total flights between the two destinations.

The third type of traffic between northeastern Italy and the western Balkans is tourism-related, and this has risen significantly in the last ten years. This is particularly true for Croatia and Montenegro, while Albania has yet to realize its potential in this area of bilateral economic relations.

An example of this trend, which appears to be increasing inspite of the financial-economic crisis which has had a slight dampening effect on its growth, is the evolution of air traffic between Albania and northeastern Italy. Up until the early 2000s Albania had a marginal role in the movement of goods and people by air. While this was generally true on an international level, a more favorable trend was evident regarding

northeastern Italy. The three factors briefly described above pointed to the concrete possibility of an increase in air traffic between the two locations depending on the capacity of Italian businesses to take advantage of these as yet unexploited opportunities. In subsequent years, during the decade 2000-2010, many of the economic and business opportunities were realized, making Italy Albania's most important trade partner (with 34% of the Balkan country's total trade volume in absolute terms). Against this background the three factors described above (imports-exports along with investment, immigration and tourism) all contributed to expanding and improving Albanian airport infrastructure along with the intensification of air traffic with northeastern Italy.

Thus the dynamics described above have led to an increase in airport connections. Currently there are more than 100 flights per week between Albania and northeastern Italy, specifically between Tirana and Venice, Bologna, Rimini, Trieste, Treviso, Verona and Forlì. Among these Italian destinations the greatest number of flights are into Bologna, Venezia and Verona, mainly because of the size of these urban centers and the concentration of employment opportunities in the surrounding areas.

At the other end of the spectrum are Treviso, Trieste and Forlì with a total of six flights each per week. The case of Forlì, in the province of Forlì-Cesena, approximately 70 km from Bologna and about the same distance from the Adriatic Coast, is emblematic of the obstacles which still exist to exploiting the phenomenon described in this article. In the context of air traffic directed towards northeastern Italy from the western Balkans and Albania in particular, this airport in Emilia Romagna is having difficulty taking advantage of the increase in volumes of air transport. Its geographical location, exactly halfway between Bologna and Rimini, is certainly responsible at least in part for these difficulties. However, there are several other problems that prevent the Forlì airport from fully realizing its potential. These include the fact that Forlì's

otherwise strong local industrial and manufacturing sector is not able to sufficiently make use of the opportunities offered by the airport and its connections. In addition, currently there is a vicious cycle created by the lack of activity on the part of international airlines and their connections with countries like Albania, as well as local companies' difficulties in accessing Forlì's airport services. These two factors mutually reinforce each other, discouraging new airlines from coming and preventing local businesses from the province and the surrounding area from using the airport infrastructure. Finally, we should point out that Forlì is an aviation training center (it has a technical aviation institute, a specialized university program and a flight training school) which are potentially complementary to the Forlì airport. These significant resources are not being fully exploited in part because of the limited activity at the nearby airport.

The growth that air transport (passengers and freight) is experiencing between Albania and northeastern Italy (for example the link between northeastern Italy and the western Balkans) is only suffering in part from the effects of the global economic crisis. In fact, by taking away this factor one can see a significant growth trend over the medium term. These circumstances will largely depend on the innovative and creative strategies that local and national authorities can assemble in terms both of national airport and transport policies, as well as specific solutions on the local level.

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