

EUROCONTROL



Stakeholders Survey 2002

Quantitative results Synthesis



Membre de l'ESOMAR,
du SYNTEC et de l'ADETEM
IPSOS a obtenu
le label OPOCM et est
certifié ISO 9001

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EUROCONTROL
EXPERIMENTAL CENTRE

Methodology

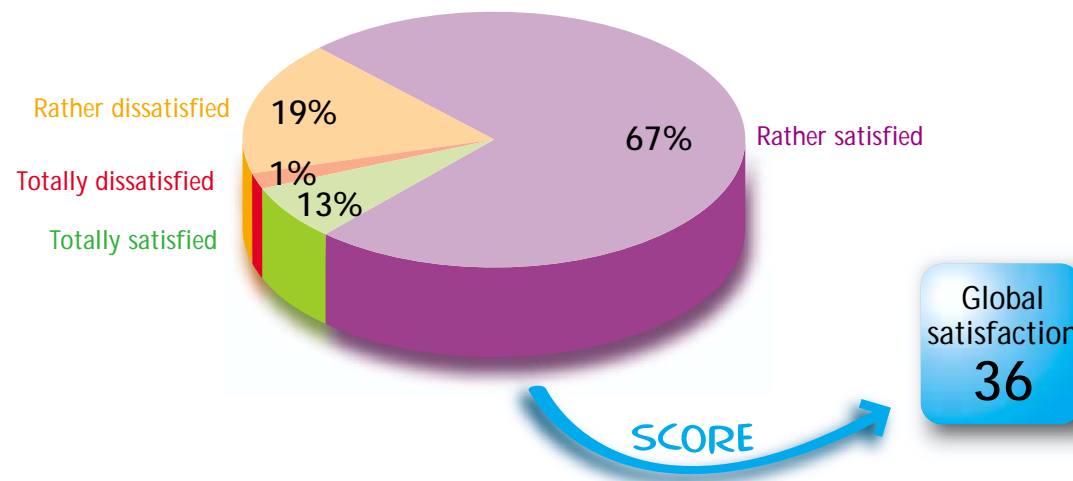


→ For the previous waves of the survey in 1997 and 1999 a purely quantitative approach was adopted using a self administrated postal survey method.

→ In 2002, so as to enable the comparability of the results with the previous waves, whilst at the same time enabling us to reply to some new and specific objectives, a double approach was adopted :

→ A self administrated quantitative survey via internet,
→ A qualitative survey amongst selected “key members” of the aeronautics industry to obtain a more strategic perception of the industry and of their views regarding EEC role.

→ The qualitative study addressed 9 representatives of the different parts of the aeronautical industry (airframe, airlines, regulatory organisations, air traffic service providers, military, supply industry...).



For measuring satisfaction we have created a global satisfaction index. This score takes into account the overall spread of replies to each of the satisfaction questions.

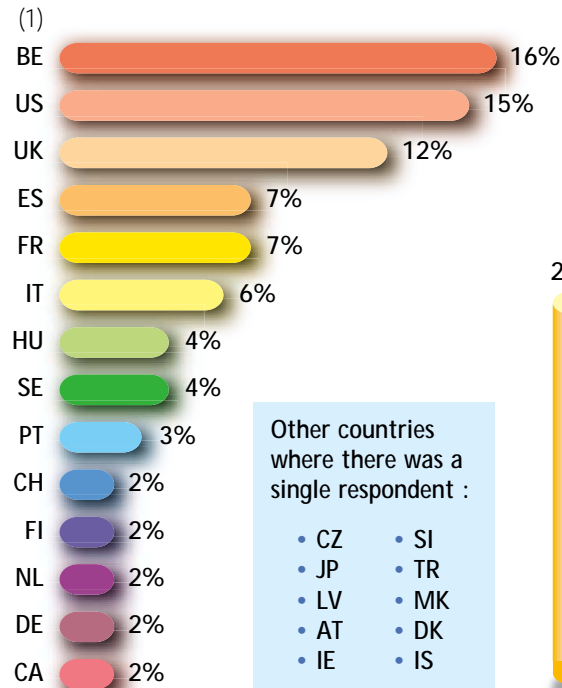
The score is calculated by attributing the following weights to each answer
 $+1 \times$ *Totally satisfied*
 $+0,5 \times$ *Rather satisfied*
 $-0,5 \times$ *Rather dissatisfied*
 $-1 \times$ *Totally dissatisfied*



→ The client segmentation sample is a reflection of whom historically the EEC have considered as their target audience. The EEC have recognised the evolutions to the Air Transport Landscape and is ensuring through its strategic re-orientation that a better balance and focus is achieved over the stakeholder community.

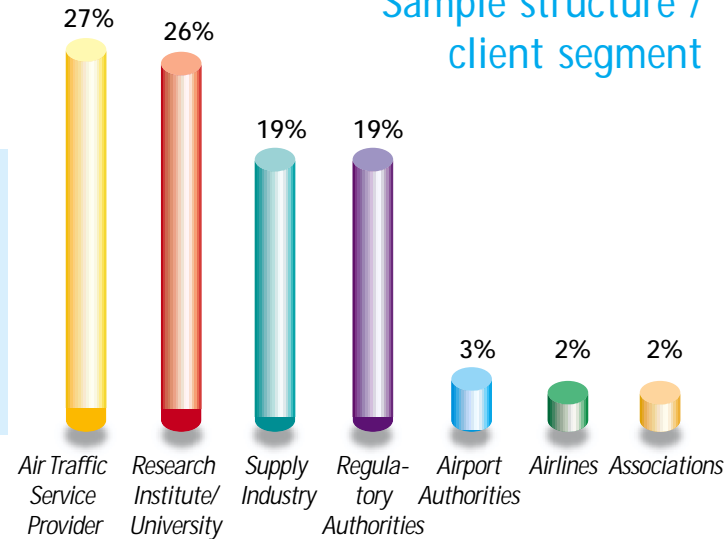
Sample description

Sample structure / country



(1) ISO 3166 Country Codes

Sample structure / client segment



The survey took place between the 1st July and the 2nd September 2002.

467 contacts were identified and validated in the original data base



94 stakeholders participated representing a 20% participation rate.



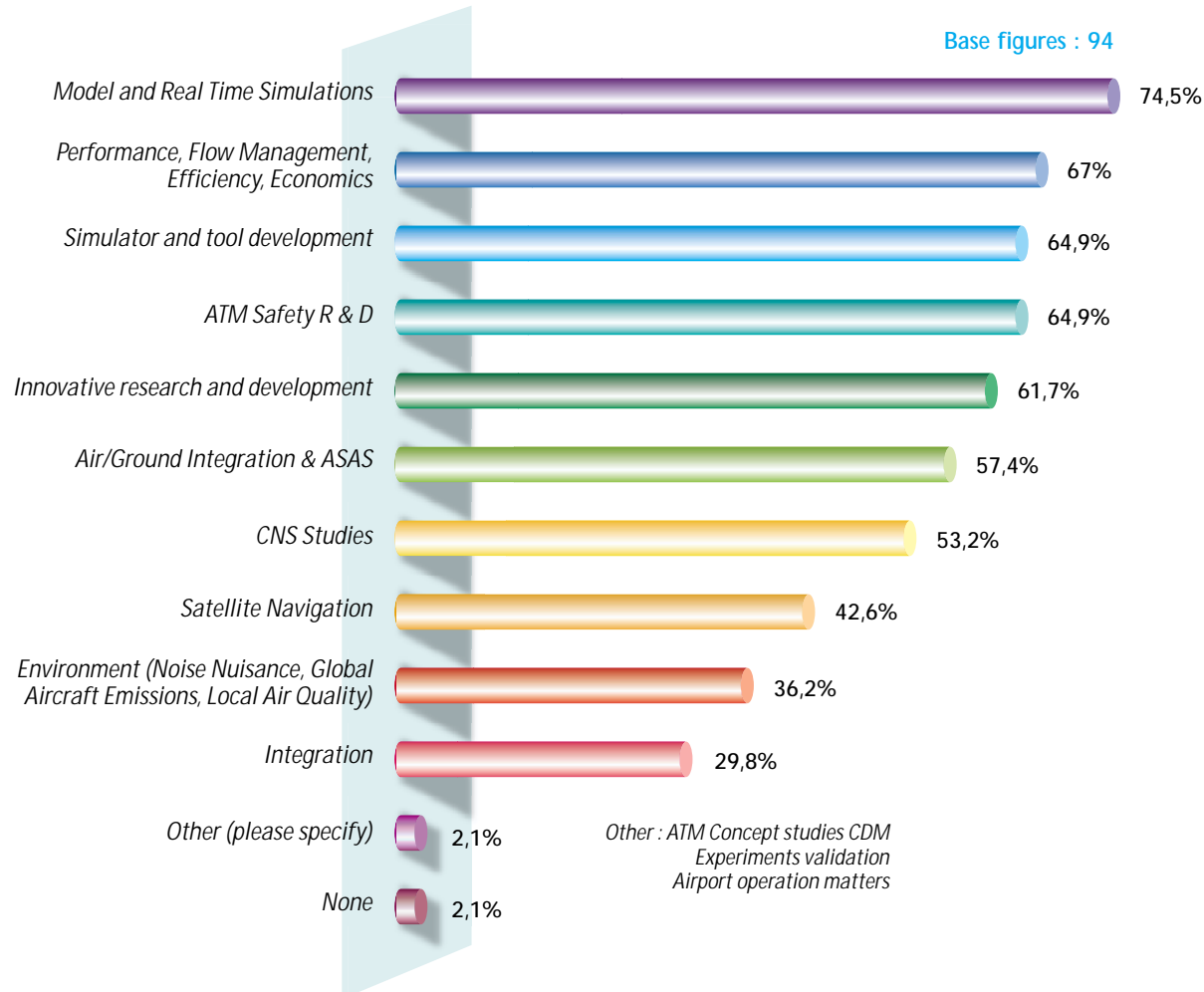


Activities awareness

→ The EEC has since its creation been associated with Real Time simulation and therefore it is of no surprise that its notoriety is founded upon this activity. However, we consider extremely positive that the new research areas have attained such a high level of recognition and welcome the positive intentions expressed for future collaboration:

- 60% - Air/Ground Integration
- 58% - Innovation
- 53% - PFE
- 50% - Safety

Which of EEC activities are Stakeholders aware of ?



The services exploited by the stakeholders are :

- Model and Real Time Simulation (39%)
- Simulator and Tool development (33%)
- Air/Ground Integration and ASAS (32%)
- Performance, Flow Management, Efficiency and Economics (25%)

Environmental concerns are beginning to become an important constraint to Air Transport growth and this is reflected by the increasing interest in the activities and services offered by the EEC with 13% of the stakeholders indicating they have already used these and some 38% stating their intention for future collaboration.



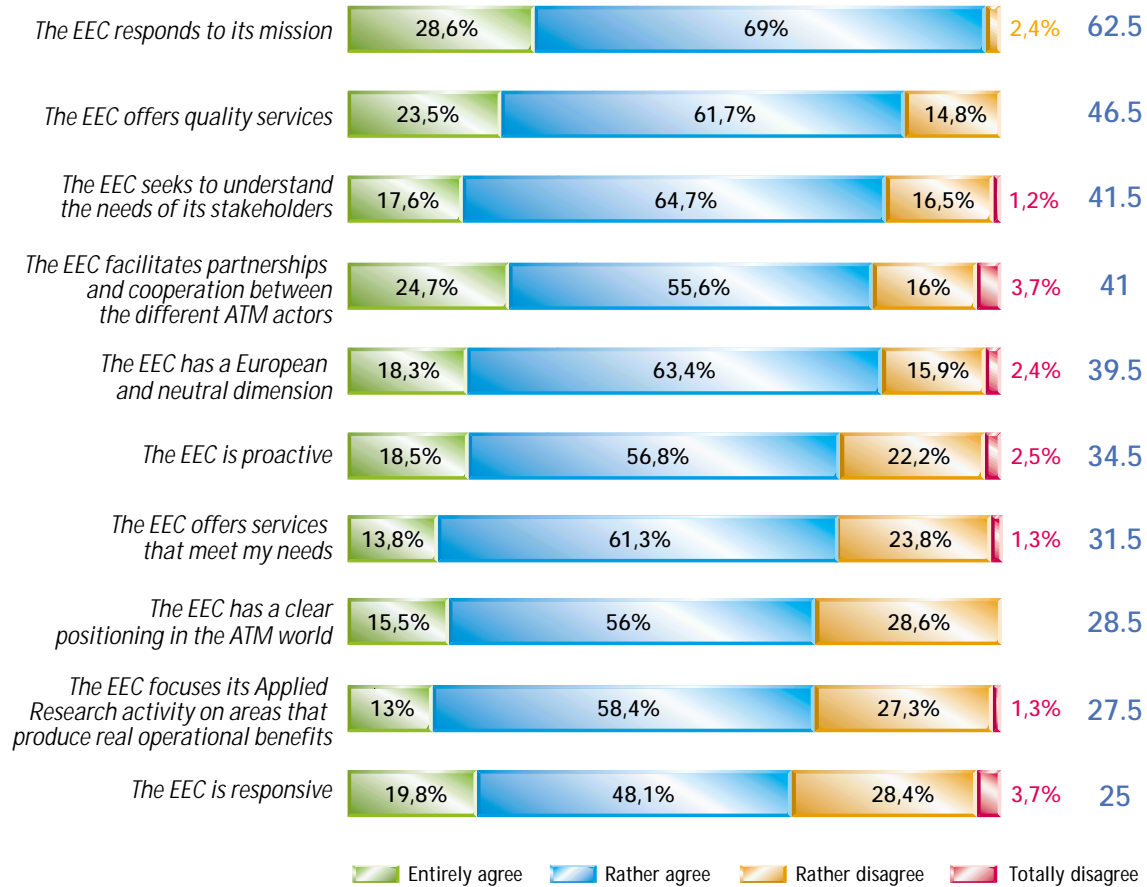


Image

→ Already highlighted in previous editions, it is felt that the EEC's focus is not tuned to respond satisfactorily to the needs of the community. The Air Transport landscape is changing rapidly and the EEC is responding to this changing environment. Recent internal agency re-organisation and improved internal processes will provide us the means to address these negative points of focus, responsiveness and positioning.

Base figures : Between 77 to 84

Satisfaction Index



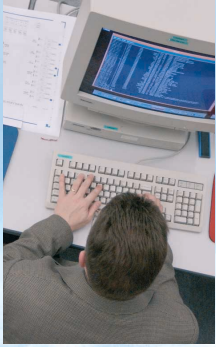
Altogether, the stakeholders have a rather positive image of the EEC. In their opinion : the EEC...

...responds to its mission,
 ...facilitates partnerships and cooperation between the different ATM actors,
 ...offers quality services,
 ...has a European and neutral dimension,
 ...seeks to understand the needs of its stakeholders.

However, 3 areas which the stakeholders have a problem adhering to and which receive low satisfaction scores (under 30) : The EEC...

...has a clear positioning in the ATM world
 ...focused its applied Research activity on areas that produce real operational benefits
 ...is responsive.

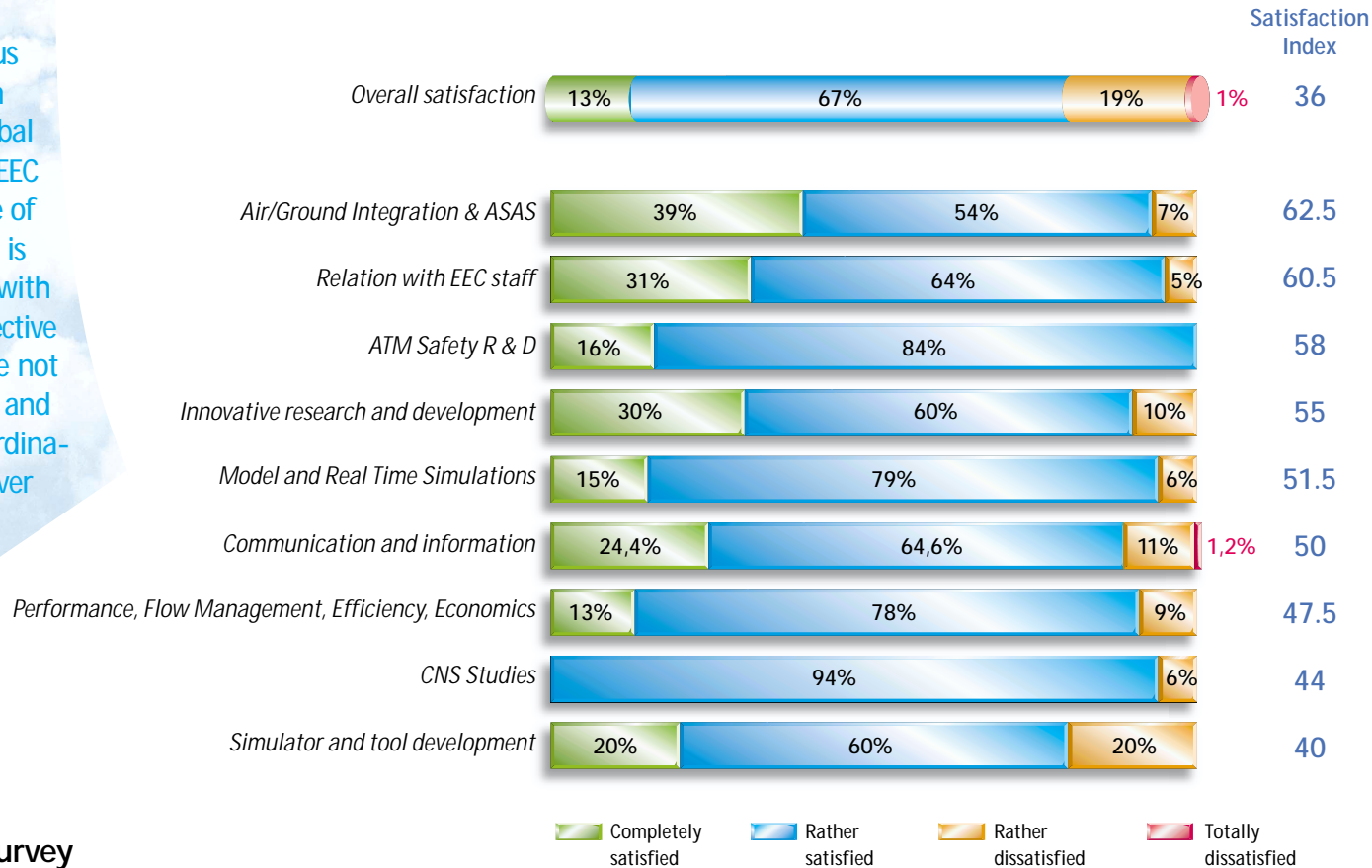
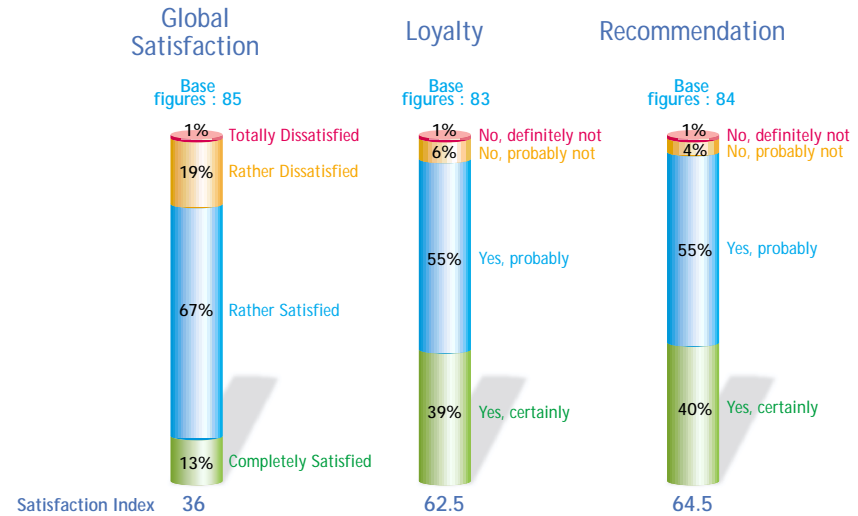




Satisfaction

Overall Satisfaction, loyalty and EEC activities satisfaction

→ The results from the qualitative survey go some way to helping us understand the reason for this rather low global satisfaction score : the EEC suffers from the image of an organisation which is overly administrative, with a feeling that the respective roles of each entity are not always clearly defined and the work not well coordinated. Individually however each service is well appreciated.



→ Indeed, the severity of the global satisfaction score is not replicated when evaluating the individual services, with a number of services receiving excellent satisfaction scores (over 50) (Air / Ground Integration & ASAS, Relation with EEC staff, ATM Safety R&D, Innovative research and development, Model and real time simulations, Communication and information) and the others, whilst slightly less well perceived, still receiving good scores (between 40-50).

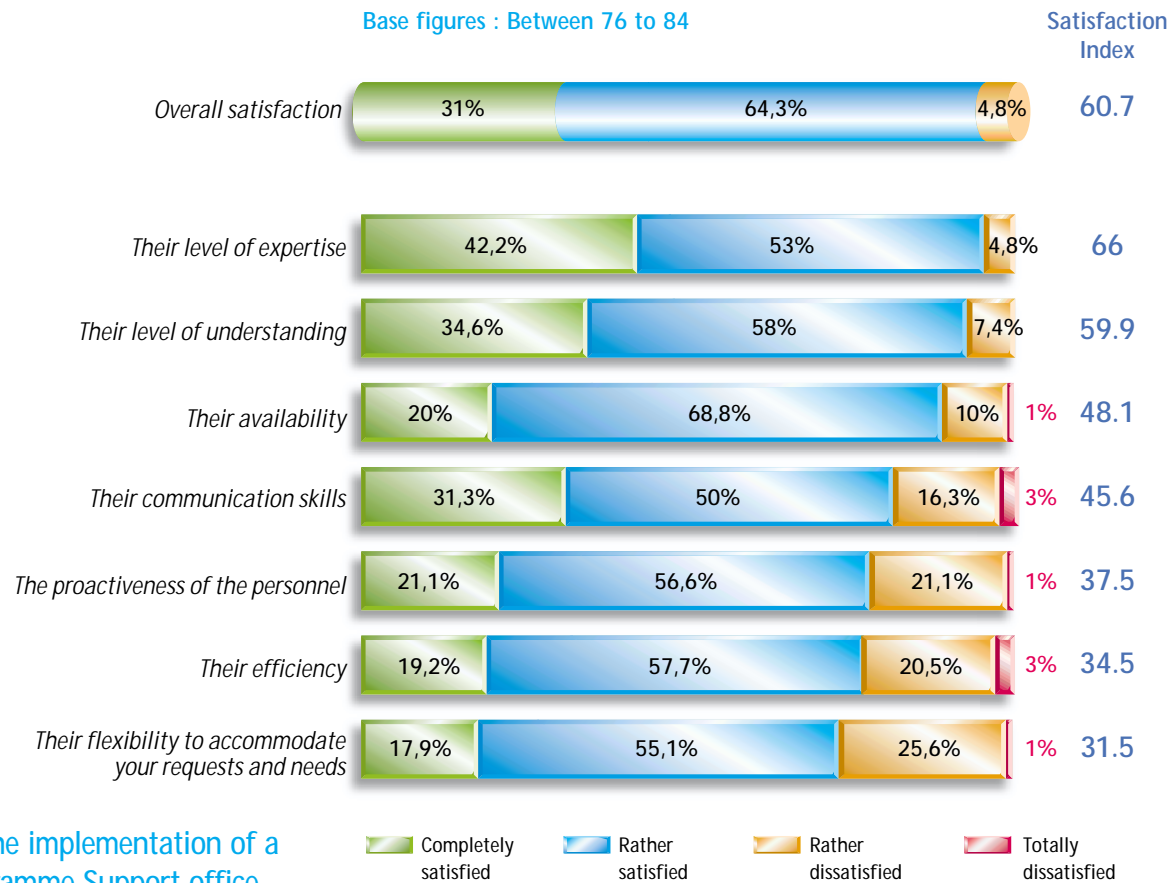


Satisfaction

→ Our people are our best assets. Building upon their expertise, awareness and availability, together with the organisation and process pillars, we have achieved a great deal of recognition in a number of research areas. However, as previously identified, we suffer from the perception of an overly bureaucratic organisation which impacts upon our day-to-day work. The organisational changes and improved internal processes in both the administrative and research areas are addressing these deficiencies.

→ The implementation of a Programme Support office, greatly facilitates the management of programmes and projects inside the EEC, removing some of the administrative burden and allowing greater availability of the management staff.

Relations with EEC staff



The teams themselves are very well perceived. Overall satisfaction is high, with three of the main component parts (expertise, understanding, availability) obtaining scores over 45.

However, there is clear need for improvement in three areas :

- Proactiveness of the personnel
- Efficiency
- Flexibility to accommodate requests and needs

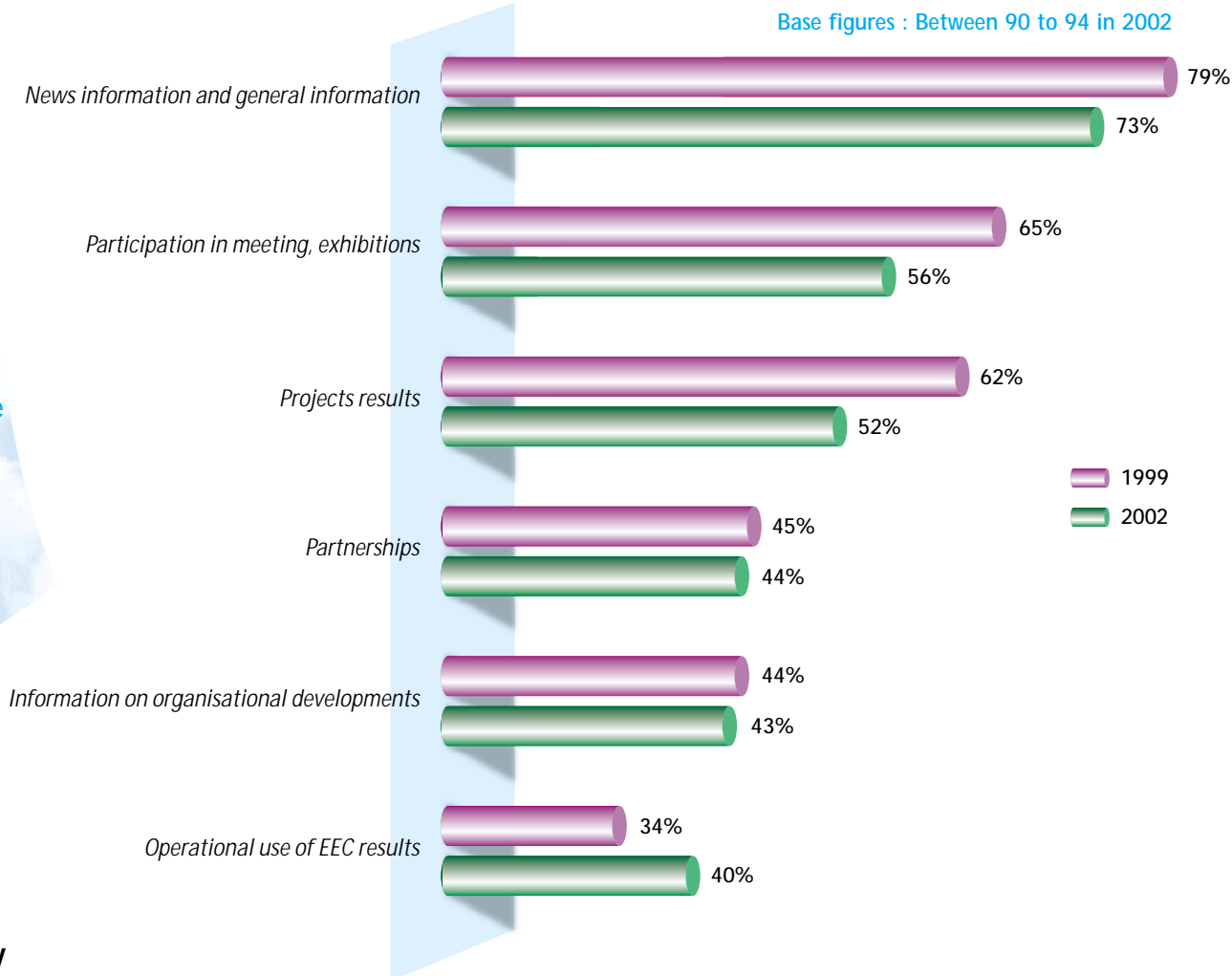


Satisfaction

→ Our stakeholders are clearly satisfied with our various means of communication (49.4 Satisfaction Index). To further improve this, we have recently initiated the EEC News-letter which is distributed electronically to over 4 000 people. However, we should note that there is a fairly consistent reduction in satisfaction when compared to our last survey and clearly there is a very strong message regarding the operational usage of results. Further analysis must be made on this particular subject to provide a consequential response. However we note with satisfaction a positive evolution.

Communication with EEC and media

% considering sufficiently informed



More than three out of five stakeholders consider that they receive a sufficient amount of general information from the EEC :

- News information and general information
- Participation in meeting, exhibitions,...
- Projects results

However there is obvious room for improvement in three areas

- Operational use of EEC results
- Partnerships
- Information on organisational developments

where two out of five and less people consider themselves to be sufficiently informed.



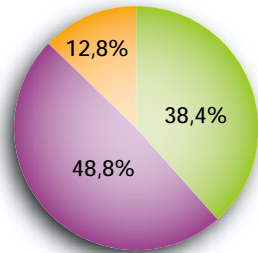
Current and future role of the EEC



→ Our stakeholders are changing and so are their needs. We have recognised the need to respond to the changing environment. The EEC has developed a vision and Strategic Goals which will enable its staff to identify and develop a set of coherent Research activities aimed at bringing benefit and providing focus.

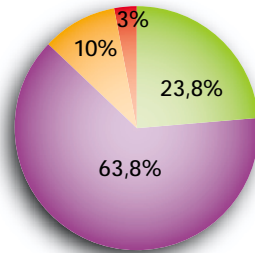
Base figures : Between 79 to 86 respondents per question

The EEC should play a greater role in the organisation and coordination of ATM research in Europe



Yes, definitely

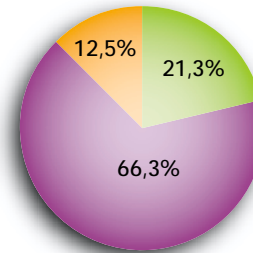
The core competences for European ATM research are sufficiently developed



Yes, rather

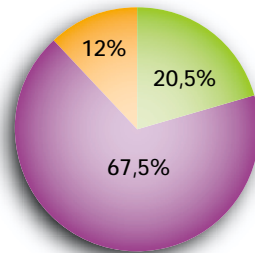
No, rather not

The EEC business activities are sufficiently oriented towards the medium and long term needs in ATM

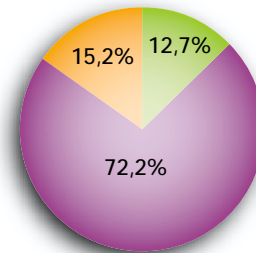


No, definitely not

The EEC strategy corresponds to expectations



The EEC provide the necessary organisational framework



→ The EEC will become the EUROCONTROL Research Centre, part of the EATMP R&D Directorate, that with strong co-ordination with the EU, will develop an R&D Master Plan and Road Map, facilitating the creation and management of a structured European Research Area.

→ The results from the qualitative and quantitative research both show the desire to see the EEC clarify it's role in the future.

A role which clearly puts the EEC in a leadership position regarding European ATM research "Organisation and coordination of ATM research in Europe", but with a clear need to develop and orient the EEC towards more tangible objectives and a clear strategy "Competences for European ATM research", "Activities oriented toward medium and long term need in ATM", "Strategy corresponds to expectations".

