

AIRSPACE CAPACITY NEEDS BETTER EU REGULATION

CANSO, the voice of airspace, calls for EU ATM performance ambitions to enable investment for air traffic growth



Brussels, Belgium, 27 August 2024 - As European air traffic continues to grow and our airspace becomes more complex, European air navigation service providers (ANSPs) are approaching a critical juncture in what they can deliver to their customers, the airspace users. Under the EU regulatory framework for the Single European Sky, the ATM Performance and Charging Scheme^[1], ANSPs are restricted in their investments in both staffing and infrastructure. **The EU must choose whether it wants a healthy aviation market for airlines and their passengers or one that prioritises saving costs above reliability.**

European ANSPs have an obligation to deliver safe, stable, and efficient airspace operations but they must now accommodate increasing levels of traffic in an increasingly challenging environment. The conflict in Ukraine has had a profound impact, shifting traffic patterns across Europe and closing off airspace for military use. There are also many more incidences of adverse weather, disrupting flight plans. The result is far more volatility in European airspace at a time when there is more air traffic crossing the skies.

The Cost Efficiency targets recently set by the European Commission for the Fourth Reference Period of the Performance Scheme (RP4, 2025-2029) continue

this outdated approach. For the past two decades, total ANSP costs have remained generally stable while the overall trend of air traffic levels has been upwards. The result is insufficient ATM capacity and more air traffic flow management delays, particularly during peak travel seasons. EU Cost Efficiency targets are therefore a false economy.

As CANSO Director General Simon Hocquard explains: “Airlines and their passengers expect ever more capacity but CANSO’s members are limited in what they can invest to provide what is needed. We therefore call on the European Commission to adopt a new approach to ATM regulation and support levels of future investment in ATM that will transform our industry. Only in this way can ANSPs address the continued traffic growth.”

As airlines continue to order more aircraft, they expect ANSPs to meet more demand. In order to provide what they need and their passengers deserve, the priority for the regulatory framework should be targets that enable traffic growth and facilitate technological transformation. Performance targets should be set so that the ANSPs can plan extensive investments in new technologies, new procedures and new air traffic controllers.

“We recognise that the European Commission is in a difficult position in finding a commonly acceptable long-term solution to the issue of airspace capacity. Therefore we call on the airline industry and the Commission to work with CANSO to ensure the efficient growth of the aviation sector in Europe,” says Mr. Hocquard.

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[1] [SES Performance and charging - European Commission \(europa.eu\)](#)

***Note to Editors: Following the UK’s exit from the European Union, UK NATS is regulated by the UK Civil Aviation Authority, not by the European Commission. NATS’ current regulatory settlement, NR23, runs from 2023 through to 2027.**

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Background - Facts and Figures

> Operational Challenges

Traffic growth

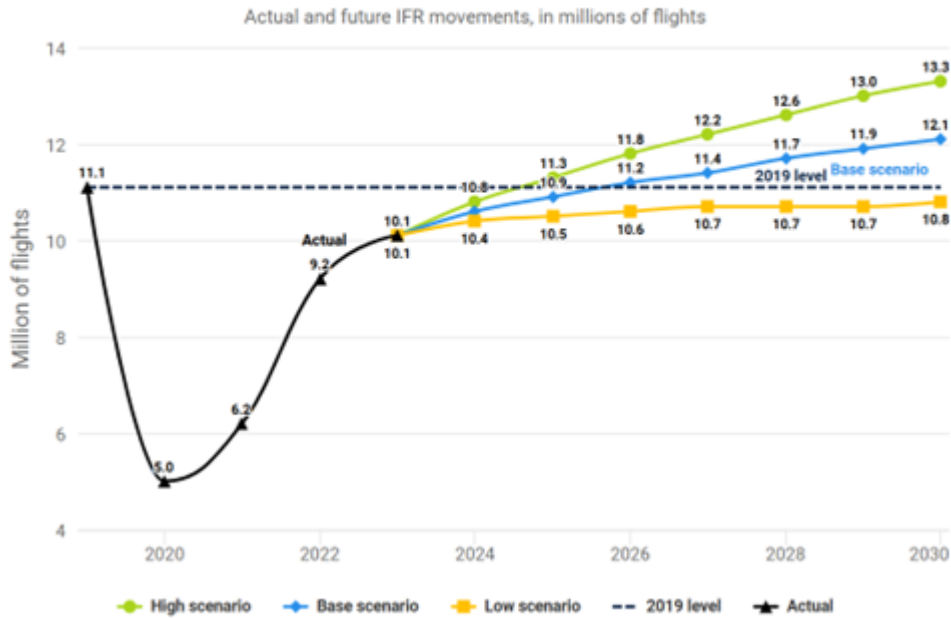
Last year, European ANSPs successfully guided 10.2 million flights through the skies, with very high levels of safety.

According to a forecast by EUROCONTROL,^[1] the number of flights in Europe^[2] this year is likely to reach 10.6 million, an increase of 4.9 per cent compared to 2023. This trend is expected to continue, with an increase to 10.9 million flights in 2025, 11.2 million in 2026 and 12.1 million in 2030.

[1] [EUROCONTROL Seven-Year Forecast, Spring 2024](#)

[2] [EUROCONTROL’s forecast covers the 44 countries of the European Civil Aviation Conference \(ECAC\)](#)

EUROCONTROL 7-year forecast for *Europe 2024-2030 - Spring 2024

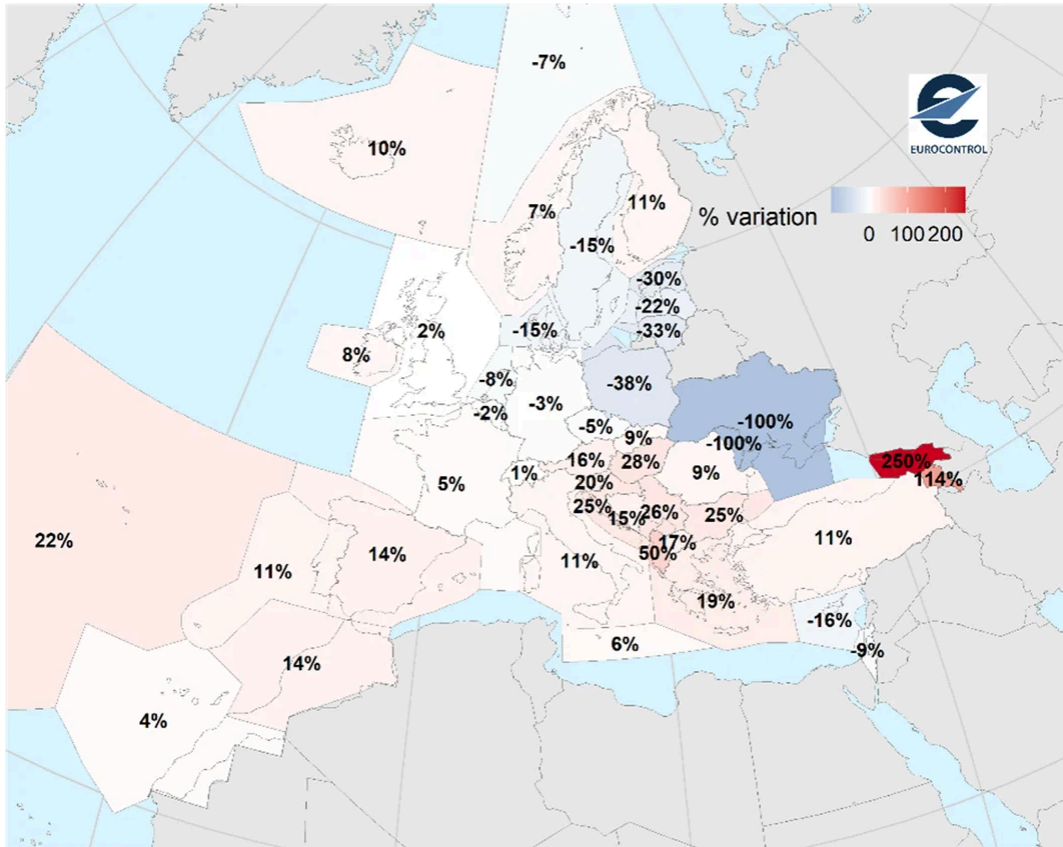


Source: EUROCONTROL Forecast 2024-2030 (February 2024)

Uneven traffic recovery

The impact of Russia's invasion of Ukraine can clearly be seen in the map below: those countries bordering the conflict have experienced a loss of traffic, while those to the west and south-west have seen an increase. The end of war will call for rapid and significant efforts to accommodate again changed traffic flows.

Traffic Zone (based on FIR) % Overflights variation June 2024 vs June 2019



The designations employed and the presentation of the material on maps, videos and animations do not imply the expression of any opinion whatsoever on the part of EUROCONTROL concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries

Source: EUROCONTROL Aviation Intelligence Unit

Adverse Weather

Last year, weather was attributed for the first time as the main reason for en-route ATFM delay.^[1] Adverse weather has continued to play a significant role this summer, as acknowledged by EUROCONTROL:

'The weather-related ATFM delay per flight during July (2.4 min/flight) was over 40 per cent more than in 2023. For safety reasons, aircraft avoid convective weather, reducing the number of aircraft flying through the affected airspace. As flights try to re-route into non-weather affected areas, there is a knock-on effect when these other areas are already operating in a saturated environment at the limit of their capacity – resulting in additional ATC Capacity delays.'^[2]

Declining ATCO numbers

Many ANSPs are confronted with declining numbers of air traffic control officers (ATCOs), and they face a wave of retirements over the next decade. It takes an average of two to three years to train an ATCO, while the low number of applications in a competitive market for young talent remains a huge challenge.

Financial Constraints

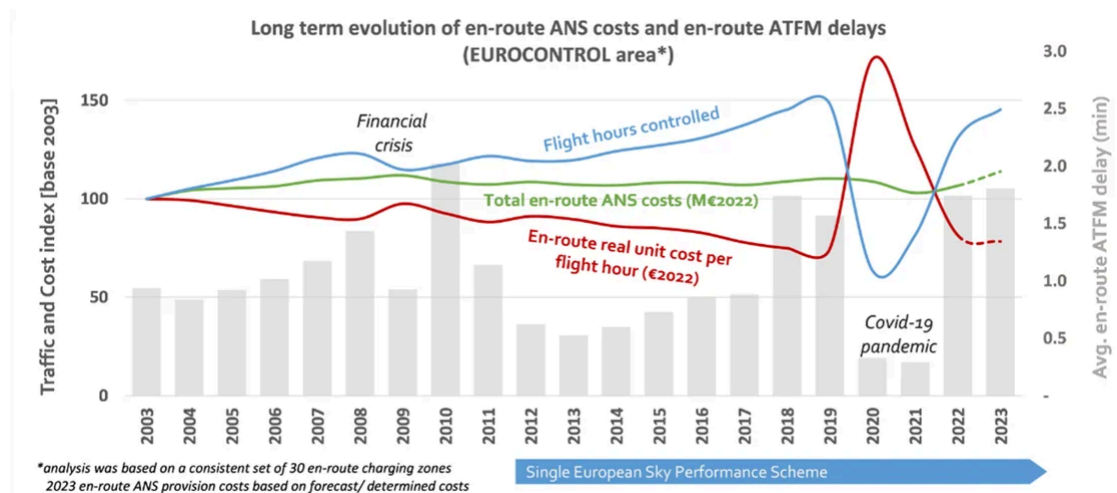
Costs per Service Unit

Over the last twenty years (with the exception of 2020 / 2021 due to COVID), total en-route ANS costs have remained broadly stable in real terms, whereas total en-route Service Units provided by ANSPs to airspace users have grown. This means that Costs per Service Unit charged to airspace users have decreased: en-route real unit costs per flight hour in 2023 were at 78.4 per cent of 2003 levels in real terms.^[3]

[1] [EUROCONTROL Performance Review Report 2023](#)

[2] [EUROCONTROL Press Release 'July 2024 – Overview of Network Performance'](#)

[3] [EUROCONTROL Data Snapshot #45: Long term perspective on ANS performance](#)



Source: EUROCONTROL Data Snapshot #45: Long term perspective on ANS performance

CANSO reaffirms its total commitment to the people involved in the safe, stable, and efficient operations of the European Network. Despite the challenging conditions and well-documented staff shortages in many areas, ANSP employees tirelessly go the extra mile every day to deliver the best services possible. Safety and security shall remain the absolute priorities under all circumstances.



CANSO – the Civil Air Navigation Services Organisation – is the global voice of airspace and is shaping our future skies. Its members support over 90 per cent of the world’s air traffic and include air navigation service providers, airspace users and operators, manufacturers, and aviation industry suppliers. CANSO raises the bar on global ATM performance by connecting the industry to share knowledge, expertise and innovation



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