

Press Release: How to manage more traffic in less airspace



Brussels, Belgium, 27 September 2024 – The Annual Monitoring Report by the Performance Review Body (PRB), released yesterday, has highlighted the performance of air navigation service providers (ANSPs) across Europe in 2023. The report reflects the growing challenges of managing Europe’s increasingly busy airspace as air traffic approaches pre-pandemic levels.

The Civil Air Navigation Services Organisation (CANSO) underlines that its European ANSP members accommodated this traffic growth while maintaining an excellent safety record, with even fewer safety-related incidences than the year before. Safety is always our top priority.

At the same time, CANSO's members provided their services in a more crowded and more complex operating environment. According to the data presented in the report, ANSPs in 29 European countries^[1] safely guided 9.1 million flights through the skies in 2023, representing an increase of 9 per cent from the previous year.

With traffic levels expected to continue climbing, CANSO is proposing several initiatives to work alongside aviation stakeholders, focusing on expanding capacity and ensuring the ongoing safe and efficient management of Europe’s airspace.

Key factors in 2023

In 2023 there was a great variation between countries in the post-pandemic aviation recovery, with some countries already experiencing traffic levels above those of 2019 and others still below.

ANSPs operated under a new constraint, namely the impact of the war in Ukraine. Many aircraft flying through Europe's skies were rerouted to the west and south-west to avoid the closed airspace as a result of the conflict. As a consequence of these restrictions, available European airspace was 20 per cent smaller than usual, but ANSPs still had to manage the growing levels of traffic. The airlines, ANSPs and EUROCONTROL tackled this collaboratively and delivered a mutually agreed European Network Operational Plan, which sets out forward-looking capacity to the extent that is deliverable.

Additionally, adverse weather played a major role in disrupting schedules and was responsible for a record average en route delay of 0.53 minutes per flight.

Lastly, the long-term consequences of the pandemic were still evident in terms of investments which had to be postponed and the loss of skilled staff at that time, as well as subsequent delays in the delivery of new equipment.

As Tanja Grobotek, Director Europe Affairs at CANSO said: "The air traffic controllers of our ANSP members work tirelessly to manage Europe's air traffic, but as flight numbers grow, we need to be creative to find solutions so that there is enough capacity in European airspace. Modernisation of ATM and Communication, Navigation and Surveillance systems must continue alongside optimising flight operations and routes, reducing flight delays, and enhancing airspace utilisation. We look forward to discussing our proposals with Europe's other operational and regulatory aviation stakeholders."

How can we create more capacity?

Traffic levels across the 29 European countries are forecast to increase by 5 per cent in 2024 and to continue growing in 2025 and beyond. With available capacity near its limits, how can European aviation stakeholders accommodate this increase in flights in an increasingly complex environment?

It is important to recognise the parameters of air traffic management (ATM). While airlines can shift their flights to different routes or destinations within a few days, handling a sudden influx in air traffic requires infrastructure investments for ANSPs. As mandated by EU regulation, ANSPs plan their investments on a five-year basis, and these cannot be rapidly re-allocated if the traffic moves elsewhere, e.g. to a neighbouring country.

Addressing the anticipated traffic growth will therefore require **a joint effort of all the operational stakeholders** – ANSPs, airlines, airports and EUROCONTROL – as well as regulatory support from the EU institutions to maximise the use of a limited amount of airspace and to safely deliver more capacity.

This will require the application of a series of measures:

1) Better regulation

CANSO calls for the European Commission to rebalance Cost Efficiency and Capacity performance targets so that ANSPs have the means to make the necessary long-term investments.

EU regulation of ANSPs includes Cost Efficiency performance targets to push down their unit costs to airspace users – the airlines. While CANSO supports this objective, it is equally important that ANSPs meet their capacity performance targets. To achieve this, they must invest in order to renew and modernise the ATM infrastructure. There is also a need to recruit and train skilled staff, such as engineers to implement the transition to new systems and air traffic controllers (ATCOs) to handle the traffic increases. It is noteworthy, that the latter, according to regulatory framework, need two to three years of training. Due to financial pressures during the pandemic, many ANSPs had to cut back on investments and

recruitment, and the long-term effects are now evident. The PRB report recognises that there is a need to address a shortfall in ATCOs.

2) Airline Flight Plan adherence

CANSO calls on airspace users to adhere to the flight plan routing as planned and review their turnaround times.

ANSPs plan to deliver airspace capacity on the basis of flight plans filed by their airline customers. This can be disrupted if airlines do not stick to their filed flight plan and divert into capacity-constrained sectors instead or cancel flights at the very last moment. There is currently a daily average of 4,000 non-adherence to flight plan routings, flights that take place on a different flight level than planned - and 2,000 flights in flight planning system which are planned but do not happen across the European network. The net result of these last-minute changes is that capacity is not provided where it needs to be. Additionally, some airlines plan short turnaround times between flights, which risk disrupting slot schedules of other aircraft if they do not run smoothly.

3) Adverse weather

CANSO calls on EUROCONTROL to determine how existing resources could improve overall EU coordination in planning for adverse weather.

Adverse weather is a major cause of en-route delay and can compel ANSPs to divert flights into neighbouring sectors, creating congestion situations. In such cases, it is important to prioritise safety over punctuality.

4) Accelerated standardisation

CANSO reiterates the importance of working together with Standards Development Organisations and ATM equipment and systems manufacturers in order to develop the relevant standards to enable the roll-out of planned investments.

ANSPs schedule their planned investments on the basis of when standards or specifications for implementation will become available. When these standards or specification are delivered later than planned, this can lead to a delay in availability and delivery of the required system (upgrade) by manufacturers or even require replanning of the entire project.

5) A new approach to ATCO training and licensing

CANSO calls for an alternative to the current licensing and training requirements for ATCOs to be more system-driven. In this regard EASA has identified ATCO system-based licensing as a strategic priority.

System-based licensing is a concept which has the potential to radically improve the scalability and resilience of air traffic management. It will unlock our members' ability to configure airspace more dynamically and enable ANSPs to balance demand and capacity far better than is possible today. Future forecast traffic volumes mean that the need to increase flexibility in ATM is becoming an imperative.

[1] 27 EU Member States, Norway, Switzerland



About CANSO

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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