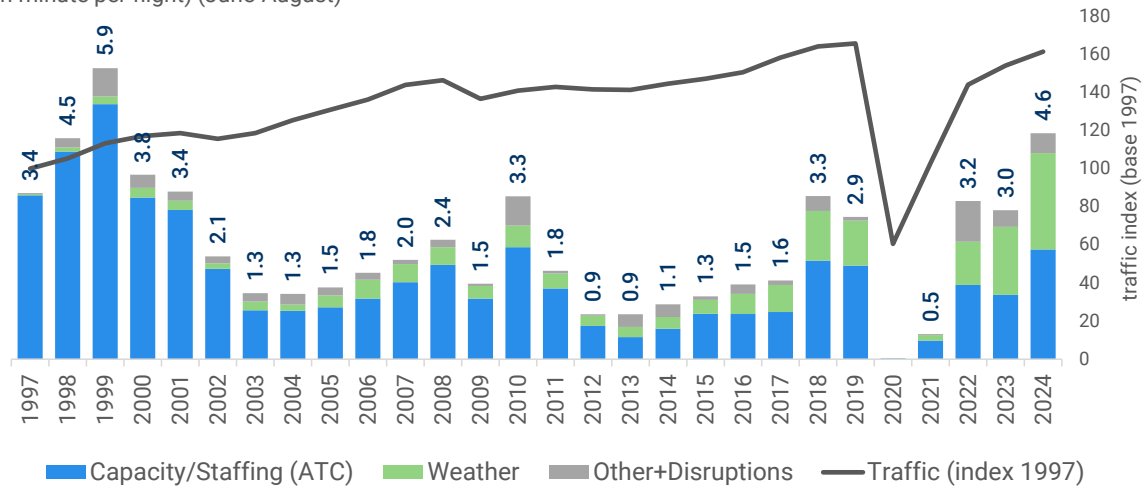




## European Air Traffic Capacity performance Summer 2024

### How did we do?

Evolution of en-route ATFM delays per flight  
(in minute per flight) (June-August)

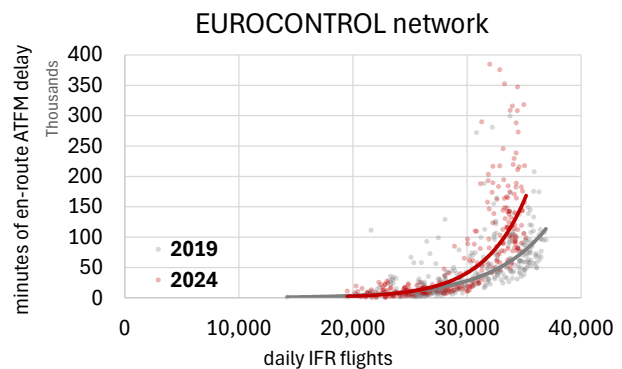


European air traffic performance is the worst since 1999 (when the capacity crisis triggered creation of the Single European Sky). This summer (Jun – Aug), although traffic was 2.6% below the 2019 pre-crisis level, en-route delays were 55% higher. Since 2019, multiple factors have impacted the network, reshaping traffic flows and leading to significantly higher traffic in Central, South-East, and South-West Europe. Most Air Navigation Service Providers (ANSPs) were able to handle the higher traffic levels but in some cases capacity and weather constraints caused high delays.

The bad news is that Air Traffic Management (ATM) delays rise very quickly once traffic exceeds network capacity (see graph).

The good news is that relatively small increases in network capacity, e.g. by having sufficient staff available in a few critical control centres, would greatly reduce delays.

If no action is taken now, future delays could dwarf summer 2024 levels.



### What about the weather?

Weather is becoming more and more significant representing 43% of delay this summer. However, analysis shows that capacity constraints attributed to weather are often aggravated by other factors. ANSPs need to increase transparency to show that weather delays are genuinely due to weather and not to other (controllable) issues, such as staffing or airspace capacity. It is also important for ANSPs and other stakeholders to take more action to mitigate the increasing impact of weather at both local and network level.

### What are the costs?

The total estimated cost of the delays this summer add up to €1.8 billion. Even if weather is taken out, the costs for Capacity and Staffing related delays still amount to almost €1 Billion.

### Why the bad performance?



**Inadequate capacity plans and delivery** – since 2014, the plans of ANSPs (in all 10 approved editions of Network Operations Plans) have failed to align with the Network targets for capacity. Furthermore, actual capacity delivered has often been less than what was planned. ANSPs face limited consequences for not planning or not providing sufficient capacity.

### What else happened?

The Covid-19 period resulted in two parallel trends - departure of senior controllers and reduced spending on training new candidates. We understand that the cost of providing the necessary capacity, (e.g. reducing staffing issues), would be a fraction of the cost of delays in 2024.

### Why act today?

There is a new cycle of submitting capacity plans to the EUROCONTROL Network Manager for review by the Network Management Board as part of the capacity planning process to prepare Summer 2025. It is critical that these plans are adequate and robust and that these plans will acceptably meet the Network requirements.

### Why the Performance Review Commission (PRC)?

Our mandate is (based on available data) to report on Air Traffic Management performance highlighting areas of poor performance and to provide advice on opportunities for improvement. Our analysis indicates that system performance is not currently meeting targets: this is not a one-off phenomenon but has become an ongoing trend. Further, reporting of delay performance is not always transparent and consistent.

### What to do?

The PRC believes that key changes are needed if performance is to be improved in the short, medium and longer term:

- Further action by ANSPs to address capacity shortfalls, including staff recruitment, airspace development and system modernisation.
- Review of the network planning process to ensure that future plans are developed to meet performance targets and that the performance plans are delivered.
- Improvements in transparency to ensure that all delays (notably weather) are accurately attributed.
- Consideration in the future of a “total cost” approach to planning, taking into account delay costs, to further encourage investment to reduce delays.
- Rapid deployment of the ATM Master Plan as a contribution to the necessary transformation of aviation operations and performance.

### Who else can help?

This report has focussed on Air Traffic Management capacity, but this is not the only contributor to aviation performance. At a time when punctuality across the whole network is also at its worst for 20 years, the PRC calls on all stakeholders to work together to optimise the use of current resources and put in place plans to deliver critical improvements in coming years. This should include better understanding of demand through improved flight plan adherence and more granular traffic forecasts as well as increased capacity.

### Will we see change?

The PRC will continue to fulfil its role in monitoring and reporting on capacity and performance through regular annual reports and special ad hoc reports as necessary. Should you wish to comment on this publication, or to contact the PRC, please email us @: [pru-support@eurocontrol.int](mailto:pru-support@eurocontrol.int)