

SUMMER 2025 PREPARATIONS

Traffic across the European network is up by 5% so far this year compared to the same period in 2024, with overall air traffic flow management (ATFM) delays also up 5% compared to 2024. These trends are expected to continue into the summer, where we expect to see growth of 5% spread asymmetrically across the network.

While some air navigation service providers (ANSPs) are expected to improve their performance compared to 2024, lack of air traffic control capacity to cope with traffic demand is expected to cause high delays in nine area control centres (ACCs). These bottlenecks will cause a daily average delay that is well above the target established by the EU Performance Plan. Additional disruptions such as weather or strikes could push delays even higher.

For Summer 2025, the main mitigation will lie in all stakeholders working together with EUROCONTROL, delivering on the #thinkNetwork campaign in close coordination with the EUROCONTROL Network Manager (NM).

SUMMER 2024 OVERVIEW

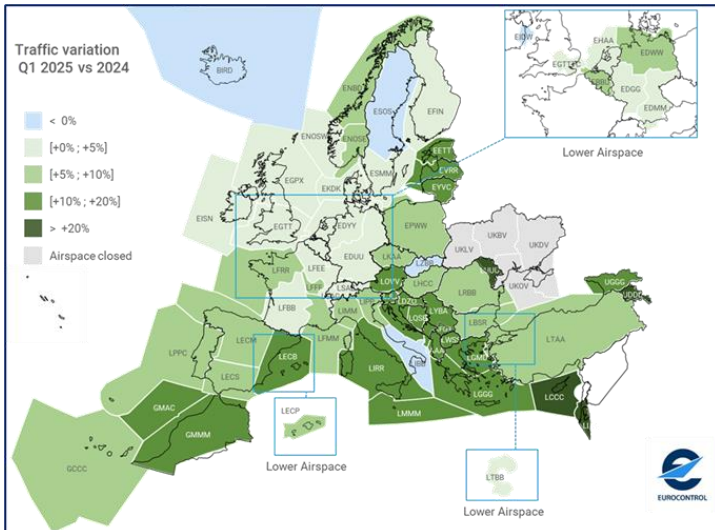
- Network traffic in 2024 increased significantly year-on-year (+5.2% vs 2023).
- While overall network traffic was at 96% of 2019, traffic growth was not shared evenly across Europe. Many States were well above 2019 levels, with some areas experiencing unplanned high traffic growth, particularly during the summer.
- Last summer was not catastrophic, but it was at times extremely difficult, with 21 days recording more than 200K minutes of ATFM delays – a new network record.
- The network recorded 2.12 minutes of en-route delay per flight in 2024. This reflects extremely poor performance during the summer.
- When including en-route and airport ATFM delays, average delays in the network were 2.8 minutes per flight, 3% above 2023 levels.
- The 2024 en-route delay figure is more than 4 times higher than the European network capacity target defined in the Single European Sky Performance Scheme.
- In addition to the impact on passengers (which could amount to more than 30 minutes of delay per delayed flight), on a day with more than 200,000 minutes of delay, the cost impact for airspace users is estimated at 20 million euro. In comparison, a normal day has an average delay per delayed flight of around 15 minutes. The environmental impact of a day with over 200K delay minutes is also estimated at 1.5 million tons of CO₂.
- Capacity and staffing remained the core causes of delay (48%), with some ANSPs not fulfilling the capacity commitments they had stated in the EUROCONTROL Network Operations Plan (NOP).
- These capacity commitments were already far from meeting the network capacity target. While the network capacity target for 2024 was 0.5 minutes per flight, the NOP 2024-2029 (July 2024)

planned for between 1.95 and 2.16 minutes per flight for 2024, depending on the scenarios, on EUROCONTROL NM measures and on weather corrections.

- The second main delay cause after capacity and staffing was adverse weather, which in 2024 became a structural issue causing around 43% of delays. This added even more tension to an already saturated situation in some ANSPs.

HOW 2025 HAS STARTED (JANUARY – MARCH)

- This year has started strongly: 5% more flights than in 2024, with asymmetric growth across the European aviation network, similar to that in 2024.



- Traffic to date is globally 4% below pre-pandemic levels, but this volume of traffic is being handled through only 80% of the airspace that was available before the invasion of Ukraine. Traffic remains very unevenly distributed, with ANSPs in the South-West, South-East and Central Europe facing 30-40% more flights than in 2019.
- On the delay side, en-route delays are currently at similar levels to 2024, at 0.44 minutes per flight. If we consider all ATFM delays (en-route + airport) we are at 0.91 minutes per flight (5% above 2024 levels) due to adverse weather conditions at a number of European airports.
- Nevertheless, in some specific key regions such as Spain-Continental, where 2025 has already seen a

significant increase in demand (+8% over the first 3 months), all ATFM delays (en-route and airport) per flight have already grown significantly compared to 2024 (+67% for continental Spain). Figures are however better in the case of Spain-Canarias (-40%).

- A similar trend has been noted in France, where ATFM delays (en-route and airport) per flight have already increased by 7%.

EXPECTATIONS FOR SUMMER 2025

- As EUROCONTROL has regularly flagged, this summer is set to be highly complex, with another significant increase in demand (+5% as per our high traffic scenario; again, very asymmetrically distributed).
- We expect some ANSPs to improve compared to last year (Hungary with increased staff availability, re-sectorisation and increased airspace capacity; Italy with increased staff availability, etc.), but overall, the efforts that ANSPs are collectively making to deliver capacity will not be enough to deliver adequate summer performance.
- The collaboration between the EUROCONTROL NM and ANSPs is excellent. However, while ANSPs are generally doing the best they can, serious structural problems with capacity and staffing mean that some will not be able to deliver a smooth summer.
- A significant number of ACCs – 48 out of 68 – are expected to deliver the capacity proposed by NM, resulting in “acceptable” delays.
- Zagreb ACC is expected to face high delays because of very high traffic growth.
- High delays are expected in the following eight ACCs for mostly capacity-related reasons:
 - **France:** Marseille ACC – due to a lack of flexible use of staff, and lower-than-expected utilisation of the 4-Flight System benefits.
 - **Germany:** München ACC, Karlsruhe UAC – due to staffing issues.
 - **Greece:** Athinai ACC, Makedonia ACC – due to staffing issues.

EUROCONTROL Flash Briefing

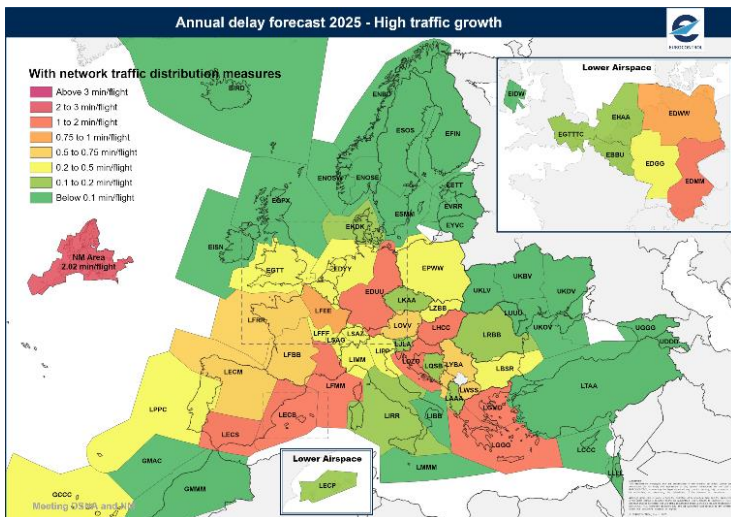
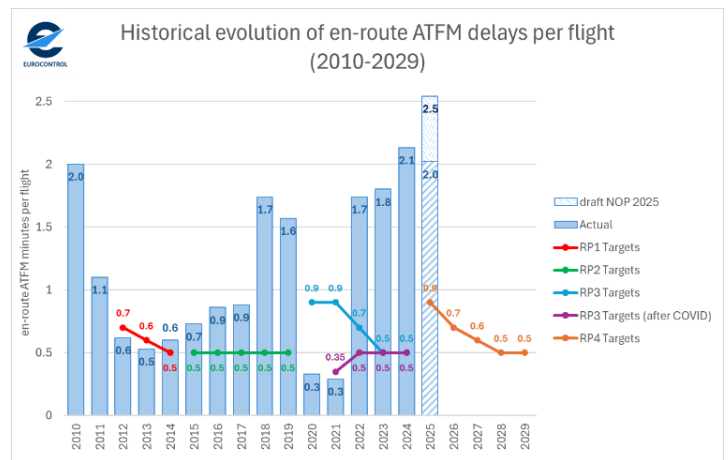


April 2025

- **Hungary:** Budapest ACC – there are still some staff shortages, plus the ongoing impact of the war in Ukraine.
- **Spain:** Barcelona ACC and Sevilla ACC – due to staffing issues.
- The capacity committed to in the NOP, and which must be met, will not be enough to guarantee “acceptable” delays in these eight ACCs. All ACCs that expect to have more than 0.5 minutes per flight (en-route) in the above delay forecast will generate significant bottlenecks in Summer 2025.
- The current NOP, based on the high growth scenario and drawing on actual airline schedules, indicates an en-route delay forecast of 2.02 minutes per flight with network measures (or 2.54 minutes per flight without), which is already far beyond the network capacity target of 0.9 minutes per flight for 2025, with the areas indicated in this briefing being under high pressure during Summer 2025. The network measures aim at re-routing traffic to avoid bottleneck areas and to use more effectively available capacity in the network.

would strain the ability of the network to manage high levels of traffic.

- EUROCONTROL estimates that air traffic controller numbers are 10-20% lower than they need to be in some parts of the network, notably in areas with high delays such as Spain, Germany, Greece, Hungary, Croatia and Serbia.



These figures have very clear implications:

- There will be a very high daily delay average, which will in turn put significant downward pressure on network performance.
- Additional disruptive elements (strikes, severe weather conditions, system failures, etc.)

WHAT NEEDS TO BE DONE

- In the **short-term**, all stakeholders must work together and, as set out in EUROCONTROL's campaign for the summer, **#thinkNetwork**:
 - **ANSPs** must **deliver the agreed capacity** for the summer as a minimum. This is already far from what is needed to achieve the network capacity target of 0.9 minutes per flight.
 - **ANSPs, airports and aircraft operators** must **prioritise first rotations** to minimise reactionary delays.
 - **Aircraft operators** must **file realistic flight plans** and, **together with the ANSPs**, do their best to **stick to them during flight plan execution**.
 - **Aircraft operators** must ensure that their **flight schedules are realistic**, including turnaround times.
 - **All stakeholders** must work closely together to **minimise the impacts of adverse weather** during the summer which, as 2024 showed, is a growing problem.
- In the **medium/longer term**, it is clear that more action will be needed at the political level to address the underlying capacity shortage (including the protection of overflights in case of strikes). Some key areas for consideration in the operational area would include:
 - **Acceleration of ATCO recruitment and more flexible use of ATCO resources** across Europe, especially in capacity-constrained ANSPs.
 - **Acceleration of major airspace changes**, leading to improved routings and greater capacity.
 - **Increased focus on the development and implementation** of **disruptive technologies** in order to better manage traffic in limited airspace.

