

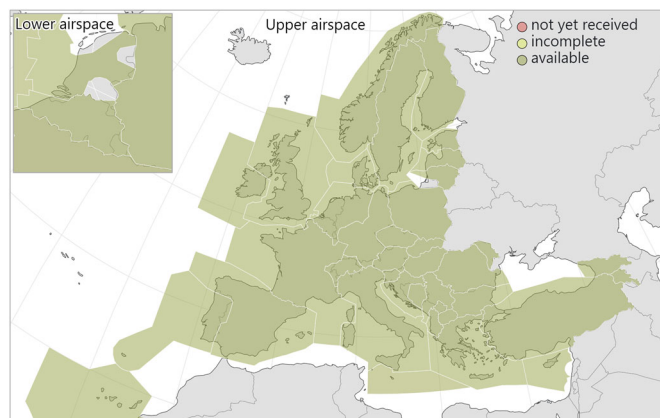
ATM Cost-Effectiveness (ACE) First look at ANSPs' 2023 data

September 2024

! This publication is based on the data received from ANSPs by the 3rd of September 2024 (covering the year 2023). The data has not yet been validated by the Performance Review Unit. It is therefore subject to change and might differ from that to be published in the **High-level Summary Report in December 2024** and the **final ACE report in May 2025**.

The map shows the ACE scope of analysis and indicates that all ANSPs provided their submissions before the deadline to be included in this publication. All monetary data are expressed in real terms (€2023).

The table below presents some preliminary key figures for the year 2023, as well as the percentage changes compared to 2022 and 2019.



ACE scope of analysis and status of 2023 data submission

Traffic (composite flight-hours)	21 M	
	+11%	(%) 2022-23
	-4%	(%) 2019-23
Revenues (gate-to-gate)	10 783 M	
	+13%	(%) 2022-23
	-4%	(%) 2019-23
Costs (ATM/CNS provision costs)	9 703 M	
	+3%	(%) 2022-23
	-4%	(%) 2019-23
Staff (ATM/CNS staff, in FTEs)	52 219	
	+1%	(%) 2022-23
	-2%	(%) 2019-23
Air traffic controllers (ATCOs in OPS, in FTEs)	17 359	
	+1%	(%) 2022-23
	+1%	(%) 2019-23
Fixed assets (gate-to-gate NBV, end of 2023)	7 702 M	
	-5%	(%) 2022-23
	-14%	(%) 2019-23
Capex (gate-to-gate)	1 154 M	
	-4%	(%) 2022-23
	-27%	(%) 2019-23

✈ Total gate-to-gate ANSP revenues rose by +13% in 2023 driven by an increase in revenues from charges which reflects the traffic recovery (+11% in terms of composite flight-hours). Despite this significant increase, ANSP revenues remained -4% below their pre-pandemic level. For some ANSPs, the ongoing war in Ukraine had a significant impact on the main traffic flows and the associated revenues.

✈ After reaching record levels in 2022, inflation rates decreased in 2023 but remained relatively high (6.4% at EU-27 level). Despite being calculated in real terms, ATM/CNS provision costs rose by +3%, mainly reflecting increases in staff costs (+€309M) and non-staff operating costs (+€99M).

2022-2023 changes by cost category

(Gate-to-gate, in €2023)

Staff costs		+5%	+309 M
Non-staff op. costs		+6%	+99 M
Depreciation costs	-1%		-8 M
Cost of capital		+2%	+13 M
Exceptional costs	-86%		-136 M
Total		+3%	+277 M

A comprehensive description of the ACE benchmarking framework and its indicators can be found in the [ACE handbook](#) and the [EUROCONTROL Specification for Economic Information Disclosure](#). The ACE dashboard and previous ACE reports are available on the [ACE website](#).



First look at ANSPs' ACE 2023 data

Trends in cost-effectiveness KPIs

September 2024



Following an exceptional increase in 2020 due to the COVID-19 outbreak and the subsequent decline in traffic, the Pan-European unit economic cost has decreased for three consecutive years.

However, the share of the cost attributable to ATFM delays continuously rose in a context of traffic recovery and reached 24% in 2023, a level similar to that recorded in 2018, which was a year marked by significant capacity issues in Europe. Although the root causes might differ and depend on specific local situations, these preliminary results suggest that the ATM industry was not able to successfully address the capacity issues already prevailing five years ago. This might be reflected in the levels and trends of staffing and investment seen over the period 2020-2023.

Further analysis will be developed in the forthcoming ACE benchmarking report.

Economic & financial cost-effectiveness

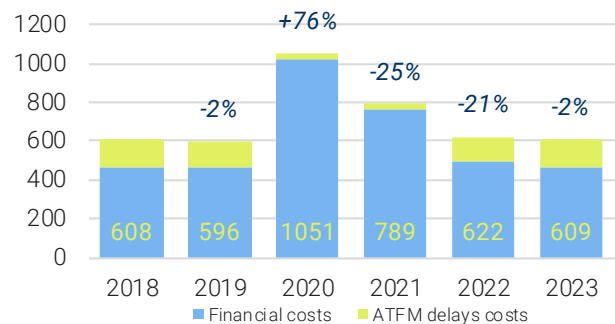
Changes in real terms (€2023)

Economic cost-effectiveness (incl. cost of ATFM delays)

€609 -2% vs. 2022
 +2% vs. 2019

Financial cost-effectiveness (ATM/CNS costs per composite flight-hour)

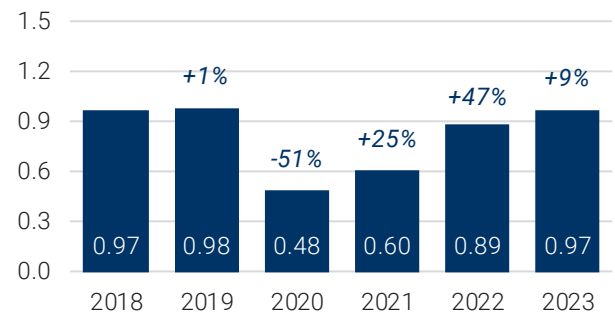
€461 -7% vs. 2022
 +0.2% vs. 2019



Productivity

Composite flight-hours / ATCO in OPS hours on duty

0.97 +9% vs. 2022
 -1% vs. 2019

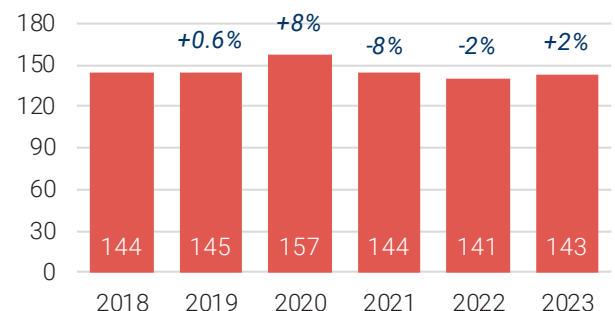


Employment costs per ATCO-hour

ATCO in OPS employment costs / ATCO in OPS hours on duty

Changes in real terms (€2023)

€143 +2% vs. 2022
 -1% vs. 2019

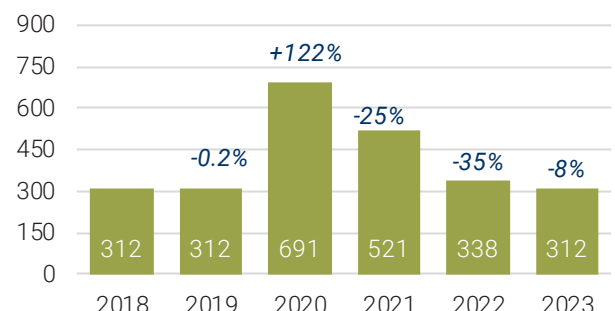


Support costs per composite flight-hour

Total support costs per composite flight-hour

Changes in real terms (€2023)

€312 -8% vs. 2022
 +0.1% vs. 2019



Preliminary analysis reflecting information contained in the 38 ANSPs data submissions received without validation from the Performance Review Unit. The data is therefore subject to change.

First look at ANSPs' ACE 2023 data

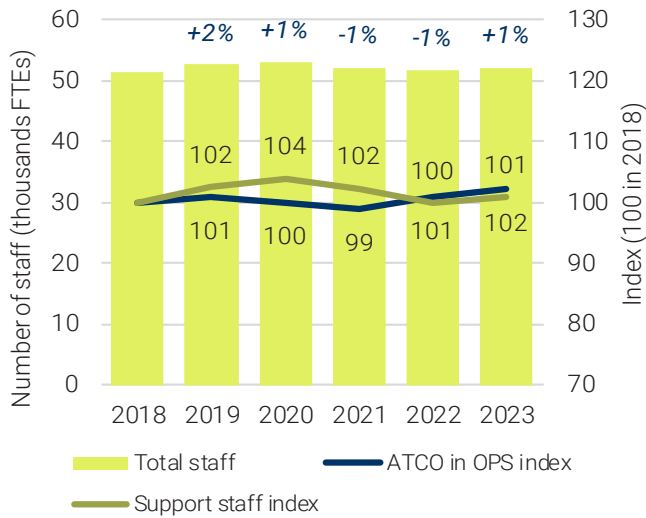
Trends in staff, capex and financial indicators

September 2024



Trends in the number of ATM/CNS staff

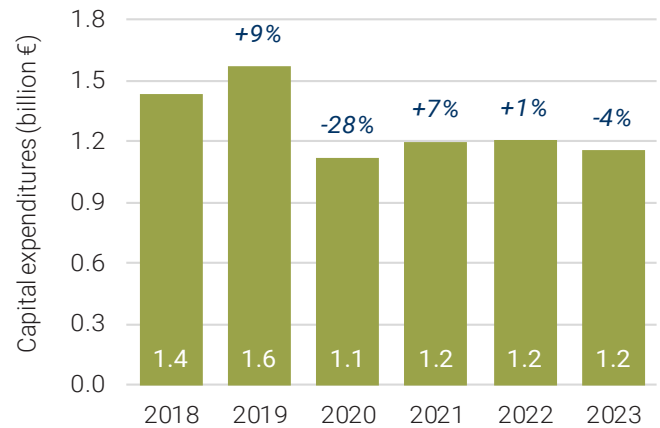
(Gate-to-gate)



✈ In 2023, the gate-to-gate ATM/CNS staff employed by ANSPs rose by +1% compared to 2022 due to increases in both the number of ATCOs in OPS (+1%) and the number of support staff (+1%).

Trends in capital expenditures

(Gate-to-gate, in €2023)

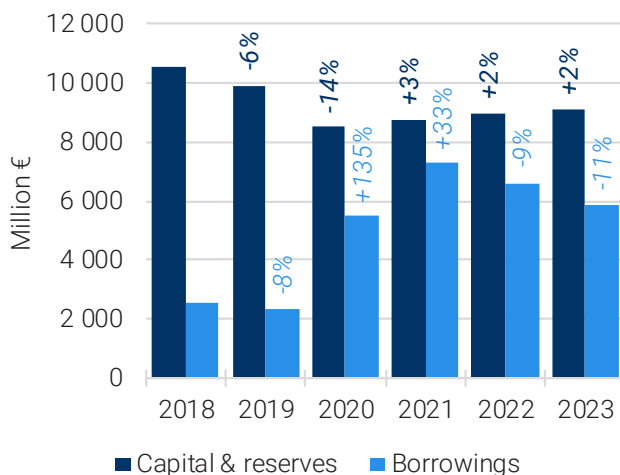


Total capex comprises the sum of investments in land & buildings, systems & equipment, intangible assets and common projects. (€2023 prices)

✈ ANSPs' capital expenditures fell by -4% in 2023, and remain -27% lower than in 2019. Since 2020, many ANSPs scaled down or postponed their investments in order to reduce cash outflow in a context of lower traffic and lower income from air navigation charges.

Trends in capital & reserves and borrowings

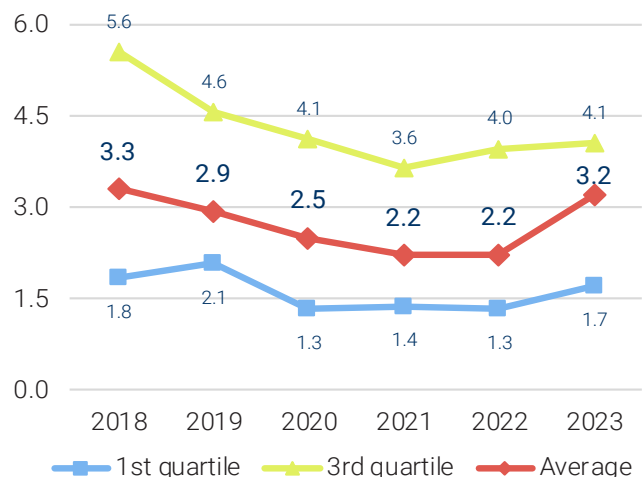
(Borrowings include both short and long term borrowings, at total ANS level)



✈ In 2023, capital & reserves increased by +2% while the level of indebtedness fell by -11%. However, the amount of debt in 2023 still remained more than twice higher than in 2019.

Trends in the current ratio

(Current assets / current liabilities, total ANS level)



✈ The average current ratio, which indicates the ability of an organisation to finance its short-term liabilities with short-term assets, increased in 2023, reaching a level close to that recorded before the COVID-19 pandemic.

Preliminary analysis reflecting information contained in the 38 ANSPs data submissions received without validation from the Performance Review Unit. The data is therefore subject to change.