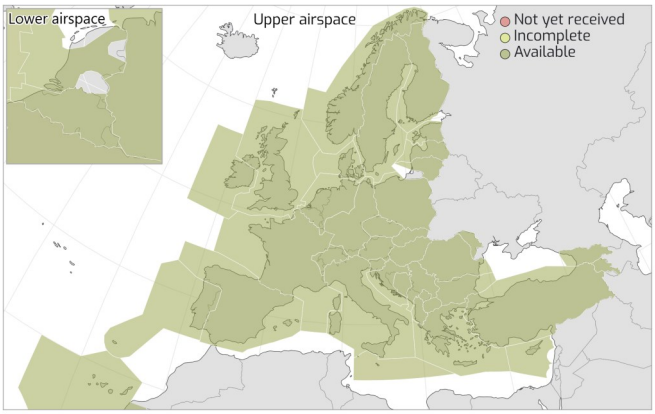
ATM Cost-Effectiveness (ACE)
First look at ANSPs' 2025 data
September 2026

This publication is based on data received from ANSPs by the end of September 2026, covering the year 2025. **The data has not yet been validated by the Performance Review Unit and may change before the High-Level Summary Report (December 2026) and the final ACE report (May 2027).**

The map shows the ACE scope of analysis and indicates that all 38 ANSPs provided their submission before the deadline to be included in this publication.

The table below presents preliminary key figures for 2025, along with percentage changes compared to 2024 and 2019. All monetary figures are expressed in real terms (€2025).



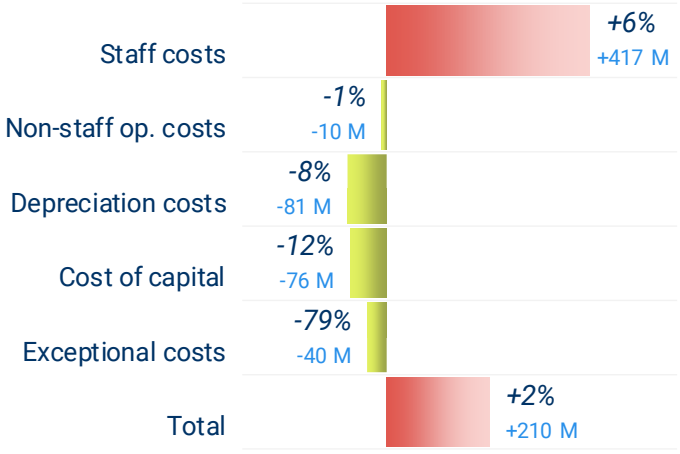
ACE scope of analysis and status of 2025 data submission

Traffic (composite flight-hours)	23 M		
	+5%	*(%) 2024-25*	
	+7%	*(%) 2019-25*	
Costs (ATM/CNS provision costs)	10 977 M		
	+2%	*(%) 2024-25*	
	+3%	*(%) 2019-25*	
Staff (ATM/CNS staff, in FTEs)	55 309		
	+2%	*(%) 2024-25*	
	+4%	*(%) 2019-25*	
Air traffic controllers (ATCOs in OPS, in FTEs)	17 840		
	+2%	*(%) 2024-25*	
	+3%	*(%) 2019-25*	
Fixed assets (gate-to-gate NBV, end of 2025)	8 812 M		
	-7%	*(%) 2024-25*	
	-8%	*(%) 2019-25*	
Capex (gate-to-gate)	1 454 M		
	-5%	*(%) 2024-25*	
	-14%	*(%) 2019-25*	

Despite a +5% increase in traffic in 2025 and the recovery of the Pan-European system as a whole compared with 2019, 16 ANSPs still recorded traffic levels in 2025 below those of 2019, reflecting the highly heterogeneous operating environment across Europe.

Between 2024 and 2025, ATM/CNS provision costs increased by +2%, reaching a level +3% above that recorded in 2019. This was driven by higher staff costs (+€417M), partly compensated by reductions in all other cost categories: depreciation costs (-€81M), cost of capital (-€76M), exceptional items (-€40M) and non-staff operating costs (-€10M).

2024 - 2025 changes by cost category
(ATM/CNS costs, gate-to-gate, in €2025)



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 2025 data

Trends in cost-effectiveness KPIs

September 2026

In 2025, ATM/CNS costs per composite flight-hour stood at €469, -3% lower than in 2024 and the lowest level recorded since the inception of ACE benchmarking activities. This performance was driven by a combination of relatively higher ATCO-hour productivity and historically low unit support costs. The economic cost-effectiveness indicator also improved in 2025, since unit economic costs decreased by -7% compared to 2024.

Although the share of unit costs attributed to ATFM delays in 2025 (23%) reduced compared to 2024 (27%), it remained relatively high, showing the persistence of capacity shortfalls across several ANSPs and the necessity to find the right balance between improving cost-effectiveness and addressing the capacity issues.

Cost-effectiveness indicators

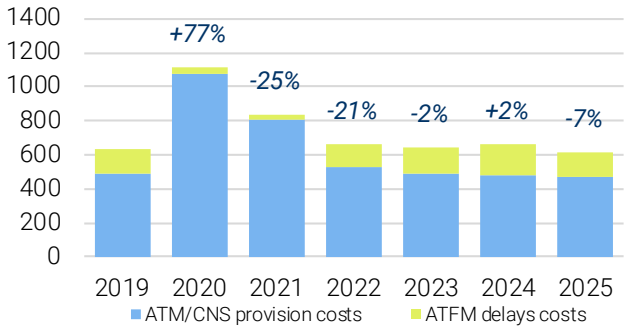
Costs / composite flight-hour (€2025)

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

€612 -7% *vs. 2024*, -3% *vs. 2019*

ATM/CNS costs per composite flight-hour

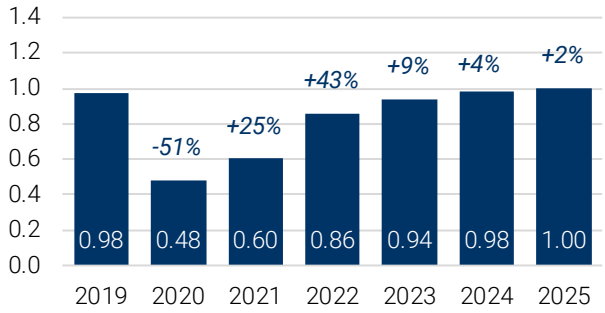
€469 -3% *vs. 2024*, -4% *vs. 2019*



Productivity

Composite flight-hours / ATCO in OPS hours on duty

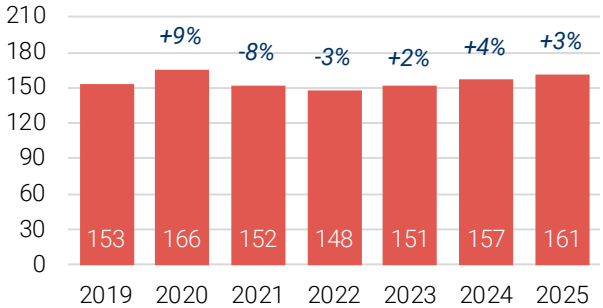
1.00 +2% *vs. 2024*, +2% *vs. 2019*



Employment costs per ATCO-hour

ATCO in OPS employment costs / ATCO in OPS hours on duty (€2025)

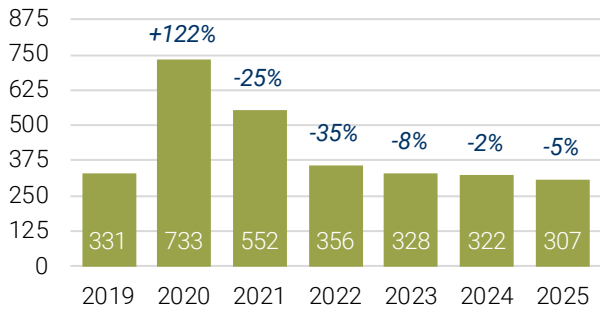
€161 +3% *vs. 2024*, +6% *vs. 2019*



Support costs per composite flight-hour

Total support costs per composite flight-hour (€2025)

€307 -5% *vs. 2024*, -7% *vs. 2019*



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

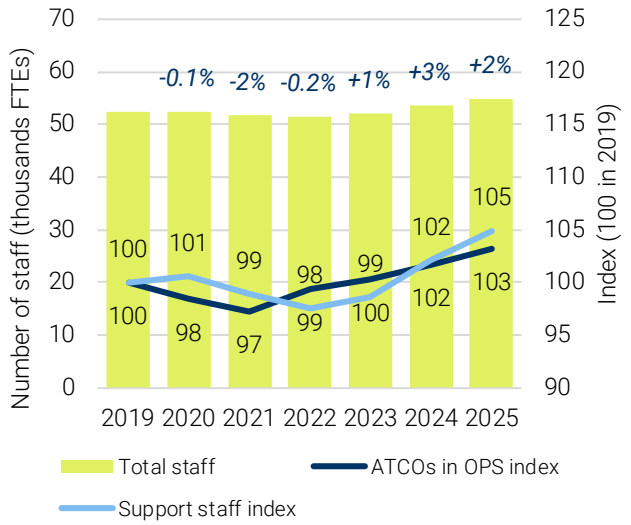
First look at ANSPs' ACE 2025 data

Trends in staff numbers, capital structure and investments

September 2026

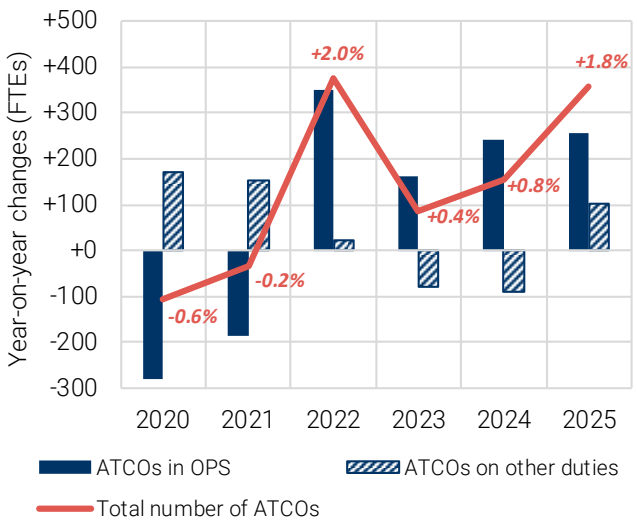
Trends in the number of ATM/CNS staff

(Gate-to-gate)



In 2025, the number of gate-to-gate ATM/CNS staff employed by ANSPs increased by +2% compared with 2024, reflecting growth in both ATCOs in OPS and support staff. As a result, total ATM/CNS staff in 2025 stood +4% above their 2019 level.

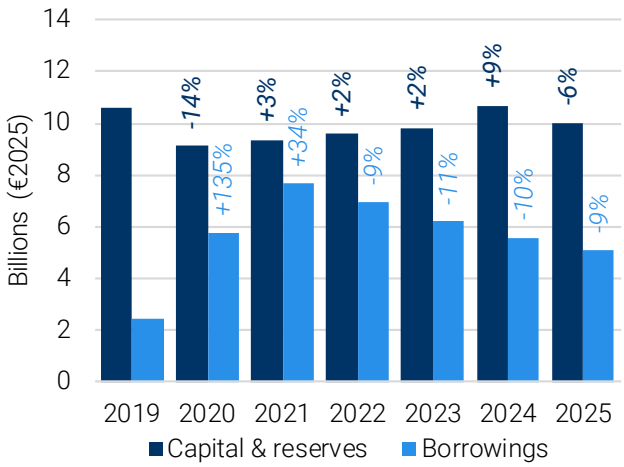
Year-on-year changes in the number of air traffic controllers (ATCOs)



Following adjustments to the ATCO workforce distribution between operational and non-operational duties over the 2020-2022 period, the total number of ATCOs progressively increased in the following years, culminating in a +1.8% increase (approximately +360 additional FTEs) in 2025.

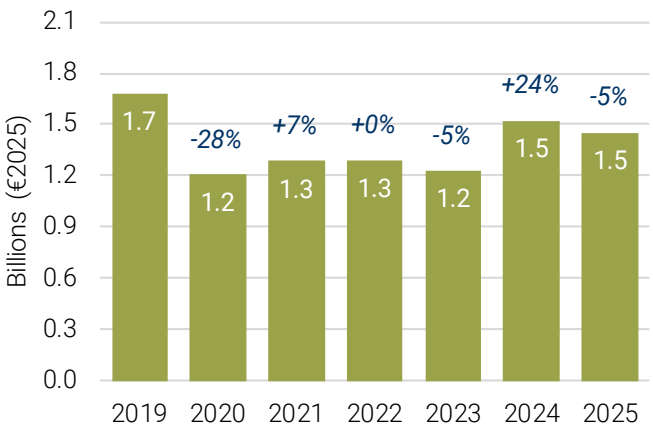
Trends in capital & reserves and borrowings

Borrowings include both short- and long-term borrowings, at total ANS level.



Trends in capital expenditures

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



In 2025, capital & reserves fell by -6%, while the level of indebtedness continued to decline, falling by -9%. Although the amount of debt remained significantly higher than in 2019, this indicates an improvement in the financial position of ANSPs. The traffic rebound since 2021, the subsequent increase in cash from operations and the gradual adaptation to a new traffic distribution shaped by the ongoing war in Ukraine created a favourable environment to maintain capital expenditures around €1.5 billion in 2025, slightly below the 2024 level (-5%).

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