

Performance Review Board

Monitoring Report

SES RP4 - 2025



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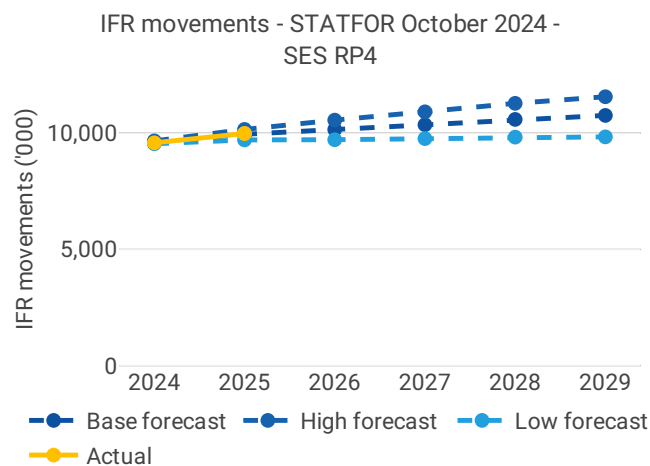
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1 OVERVIEW

1.1 Contextual information

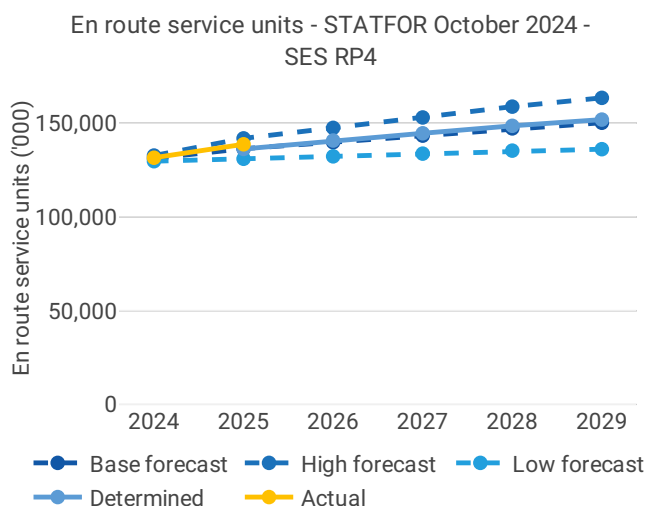
		No of main ANSPs	29
No of ACCs	49	Share en route / terminal costs 2025	82% / 18%
		No of other ANSPs	15
No of airports in the scope of the performance plan:		En route charging zone(s)	29
		No of MET Providers	23
		Terminal charging zone(s)	26
• ≥80'K			38
• <80'K			151

1.2 Traffic (SES RP4 area)



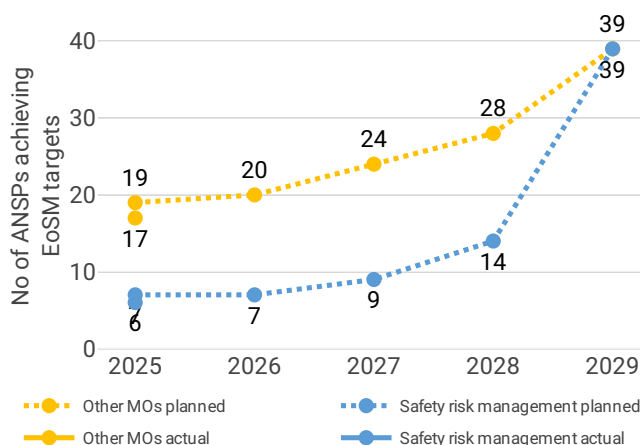
- The Union-wide level recorded 9,987K actual IFR movements in 2025, +4.2% compared to 2024 (9,587K).
- Actual 2025 IFR movements were in line with the STATFOR October 2024 base forecast (9,954K).
- Actual 2025 IFR movements were in line with the actual 2019 level (9,985K).
- In 2025, Russia's war of aggression against Ukraine continued to significantly affect traffic flows within the SES area. In addition, the geopolitical situation in the Middle East also influenced traffic patterns. As a result, some ANSPs experienced unexpectedly strong traffic growth compared with the Union-wide average, while others had yet to recover to the 2019 traffic levels.





- The Union-wide level recorded 138,709K actual service units in 2025, +5.4% compared to 2024 (131,545K).
- Actual 2025 service units were +1.8% above the plan (136,227K).
- Actual 2025 service units are +10.8% above the actual 2019 level (125,206K).
- At Union-wide level, service units continued to grow faster than IFR movements. For many ANSPs, it results in revenues increasing more rapidly than the workload generated by additional flights. However, this trend is not consistent across all Member States, as a number of them are experiencing the opposite situation.

1.3 Safety (SES RP4 area)

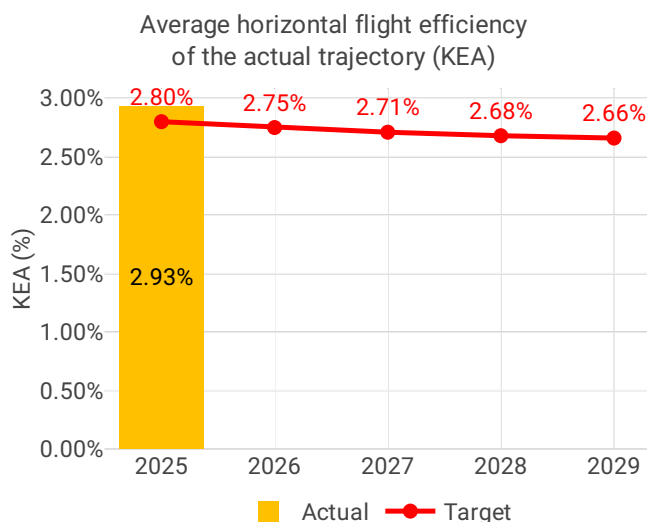


- 6 ANSPs achieved the EoSM RP4 targets in all the Management Objectives.
- 6 ANSPs achieved the EoSM RP4 target level D on safety risk management already in 2025.
- 17 ANSPs achieved the EoSM RP4 target level C on all other Management Objectives already in 2025.
- 13 ANSPs failed to achieve the planned maturity levels for 2025.
- Four ANSPs scored minimum level A (below regulatory requirements) at least on one of the Management Objectives.



- The rates of Runway Incursions (RIs) and Separation Minima Infringements (SMIs) decreased compared to 2024.

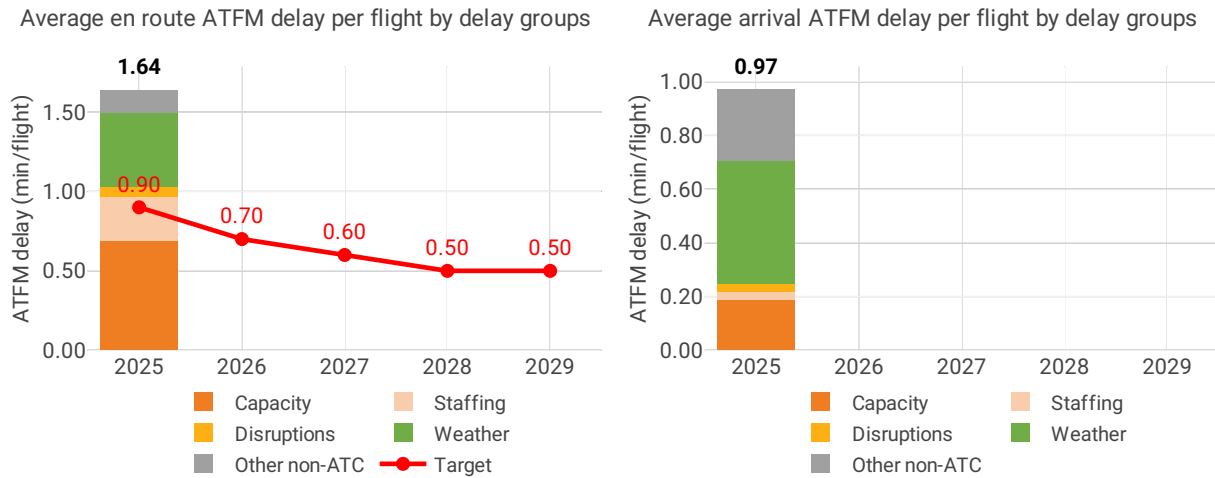
1.4 Environment (SES RP4 area)



- The Union-wide horizontal flight efficiency (KEA) performance target was not achieved (2.93% compared to the target of 2.80%). 13 Member States did not achieve their local targets. Additionally, FABEC did not achieve their local target of 2.89%. All Member States in FABEC achieved their local breakdown values apart from France.
- The third full year of Russia's war of aggression against Ukraine continues to affect the environmental performance, but marginally less than previous years (2.93% in 2025 compared to 2.96% in 2024).
- The VFE of the actual trajectory was at 76.4%.
- For terminal airspace, additional ASMA (arrival sequencing and metering area) time increased and additional taxi-out time decreased. Combined, this shows a +0.1 min increase compared to 2024, driven by additional ASMA time. Additional AXIT time was at 1.62 min (+0.03 min compared to 2024).
- The average time in level flight during decent and climb remained stable year-on-year, with a slight increase from 2024 levels.



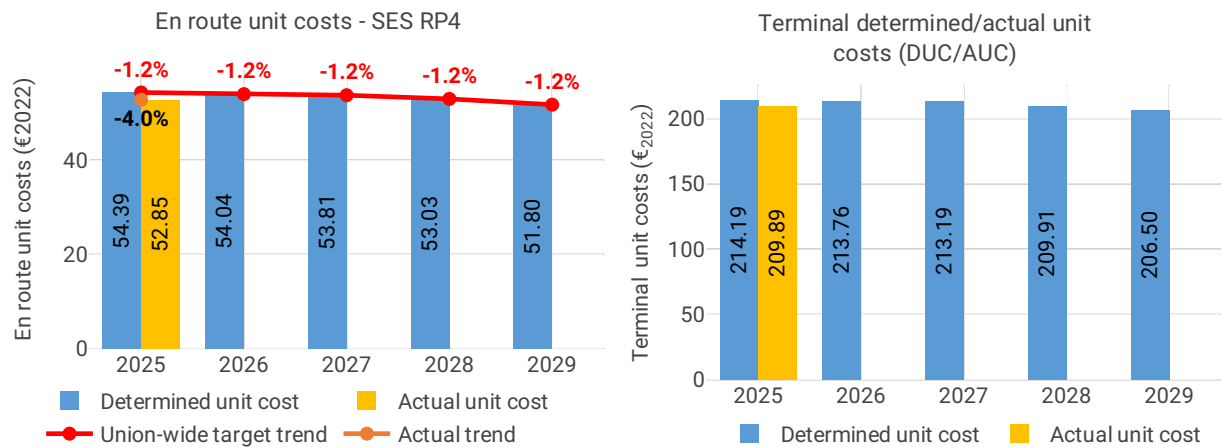
1.5 Capacity (SES RP4 area)



- The average en route ATFM delay per flight in 2025 was 1.64 minutes, 0.74 minutes above the target. Average delays showed a significant reduction compared to the 2.19 minutes per flight in 2024. Delays were also below 2022 levels despite 19% more traffic.
- For 19 ANSPs, average en route ATFM delays in 2025 were lower than or equal to 2024. For a further five ANSPs, average delays were still below 0.05 minutes per flight despite a minor increase.
- Of the seven ANSPs that did not meet their local en route capacity target in 2025, five ANSPs managed to improve their performance compared to 2024.
- Similar to the previous years, the main causes of delay in 2025 were ATC Capacity, weather and ATC Staffing.
- A significant proportion of the 0.55 minutes decrease in average delays in 2025 compared to 2024 was due to reductions in delays related to weather (-0.30) and other non-ATC reasons (-0.10).
- While noting that the scope of airports included in the RP4 performance plans is not fully aligned with the scope of RP3, Union-wide terminal capacity performance in 2025 was comparable to 2024, with an average delay of 0.97 minutes per flight in 2025 and 0.93 minutes per flight in 2024. The contribution of delays due to weather and non-ATC related airport capacity problems remained high at 75% of total arrival ATFM delays. ATC Capacity was responsible for a further 19% of delays.



1.6 Cost-efficiency (SES RP4 area)



- The real en route actual unit cost (AUC) Union-wide was -2.8% lower than the determined unit cost (DUC).
- Real en route actual costs were -1.1% below determined costs, while actual service units were +1.8% higher than the determined service units.
- The en route actual unit cost incurred by airspace users (AUCU) was -2.1% lower than the DUC, mainly stemming from other revenues.

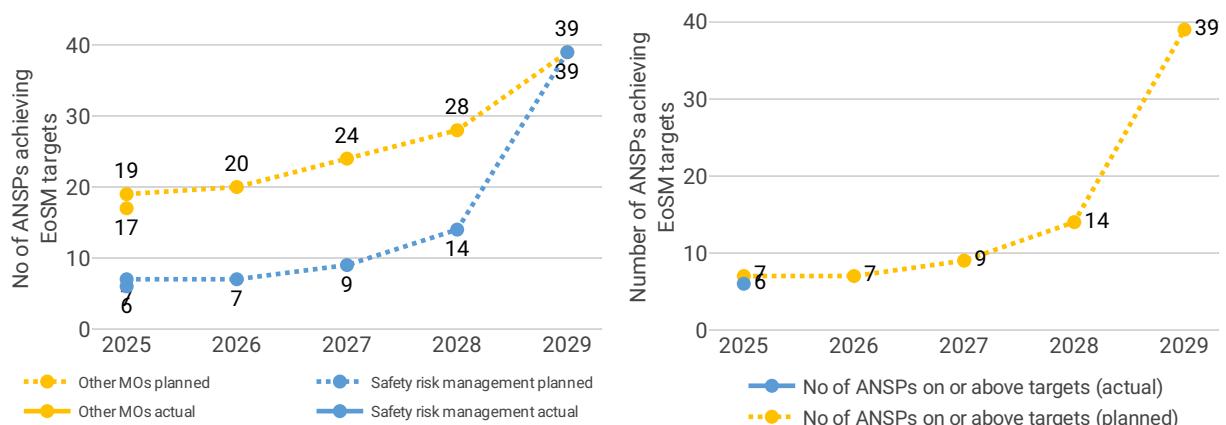


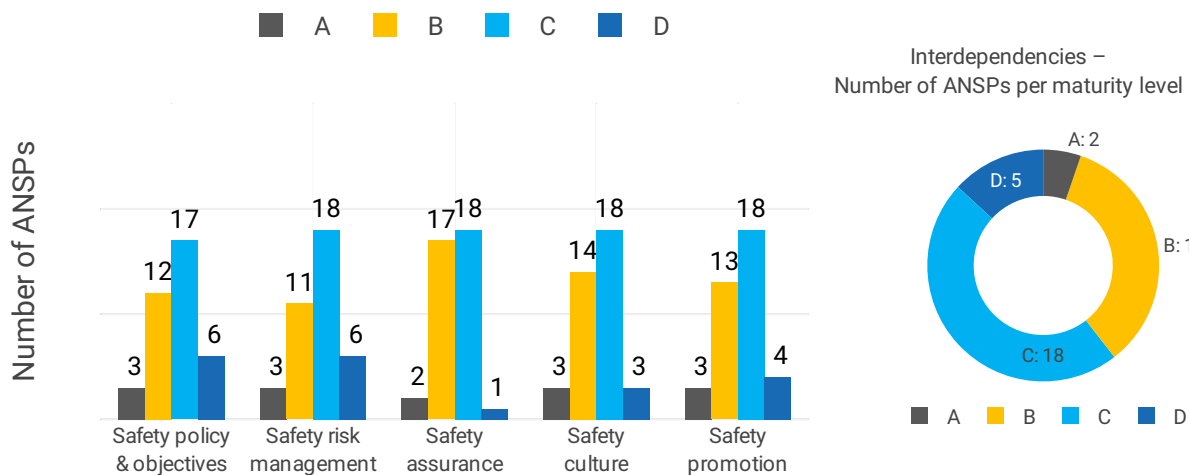
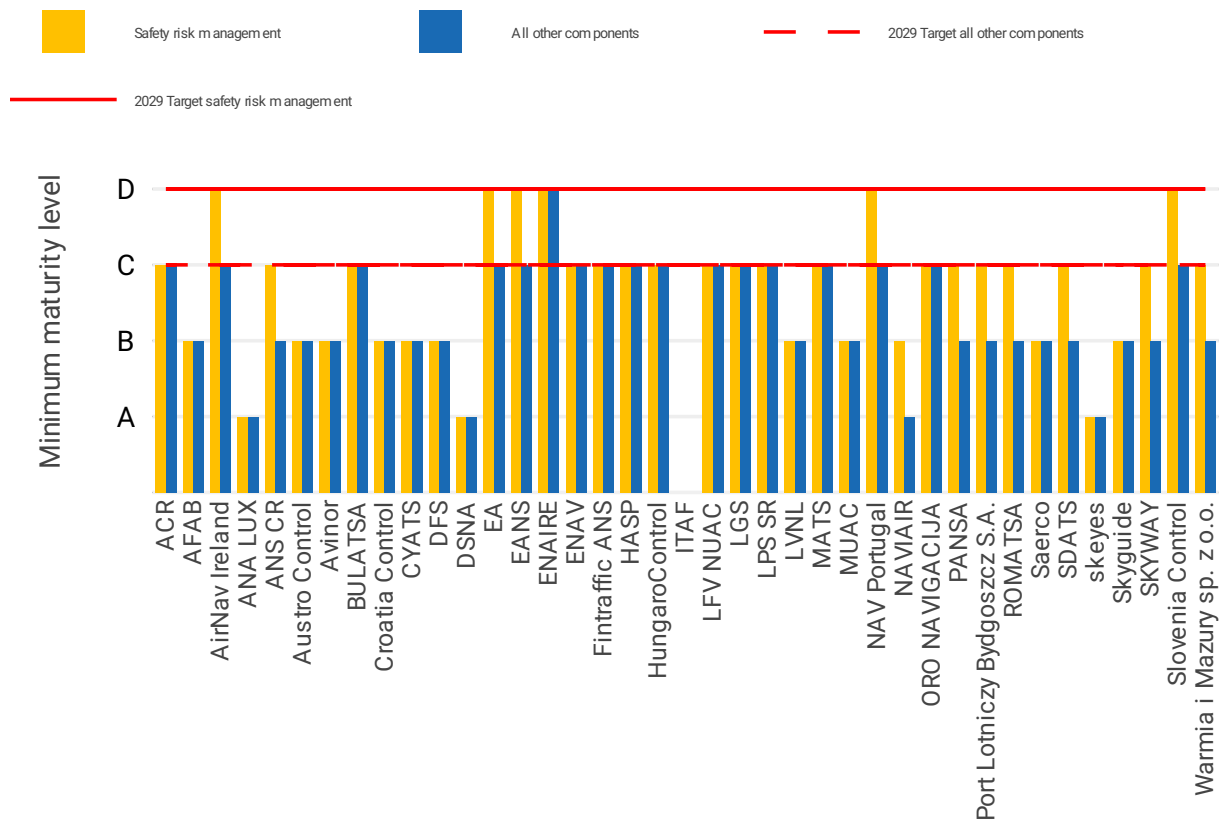
2 SAFETY - SES RP4

2.1 PRB monitoring

- 6 ANSPs achieved the EoSM RP4 targets in all the Management Objectives.
- 6 ANSPs achieved the EoSM RP4 target level D on safety risk management already in 2025.
- 17 ANSPs achieved the EoSM RP4 target level C on all other Management Objectives already in 2025.
- 13 ANSPs failed to achieve the planned maturity levels for 2025.
- Four ANSPs scored minimum level A (below regulatory requirements) at least on one of the Management Objectives.
- The rates of Runway Incursions (RIs) and Separation Minima Infringements (SMIs) decreased compared to 2024.

2.2 Actual versus planned number of ANSPs achieving the level of the EoSM targets for RP3 ahead of 2024





Focus on EoSM

Number of ANSPs on target

In the first year of RP4, six ANSPs achieved the RP4 targets for the effectiveness of safety management. More specifically, six ANSPs reached the target for Safety Risk Management and 17 ANSPs achieved the RP4 targets for all the other Management Objectives (MOs). However, overall performance remained below the planned intermediate targets for 2025, with 13 ANSPs still behind their 2025 plans (skeyes, CYATS, NAVIAIR, DSN, ANA LUX, LVNL, Avinor, Romatsa, Skyways, LFV, ACR, SDATS, AFAB). Moreover, four ANSPs (skeyes, NAVIAIR, DSN, ANA LUX), are at the lowest maturity level A (informal arrangements), below the regulatory requirements.



- 6 out of 38 ANSPs achieved the RP4 target level D for Safety Risk Management.
- 17 out of 38 ANSPs achieved the RP4 target level C for all other MOs.
- 6 out of 38 ANSPs achieved the 2024 EoSM targets for RP4 in full.

Actual versus planned

Seven ANSPs planned to achieve RP4 maturity target for Safety Risk Management already in the first year of the reference period, and 19 ANSPs planned to achieve the RP4 maturity targets for all the other Management Objectives (MOs). However, only six ANSPs achieved the Safety Risk Management target, and 17 ANSPs achieved the targets for all the other MOs.

Seven ANSPs (EANS, AirNav Ireland, Slovenia Control, LFV, ACR, SDATS, and AFAB) planned to achieve the RP4 maturity targets in 2025 for all the Management Objectives. Three of them (EANS, AirNav Ireland and Slovenia Control) successfully achieved these targets, while the remaining four were unable.

Overall, 13 ANSPs did not meet their planned intermediate targets for 2025 and remain behind their performance plan already from the first year of reference period (skeyes, CYATS, NAVIAIR, DNSA, ANA LUX, LVNL, Avinor, Romatsa, Skyways, LFV, ACR, SDATS, and AFAB).

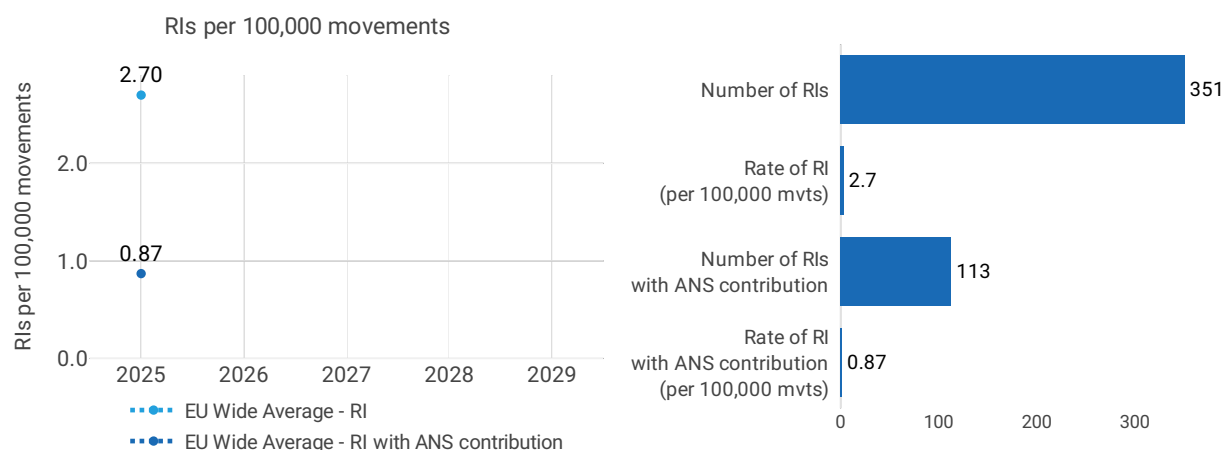
Number of ANSPs per Management Objective

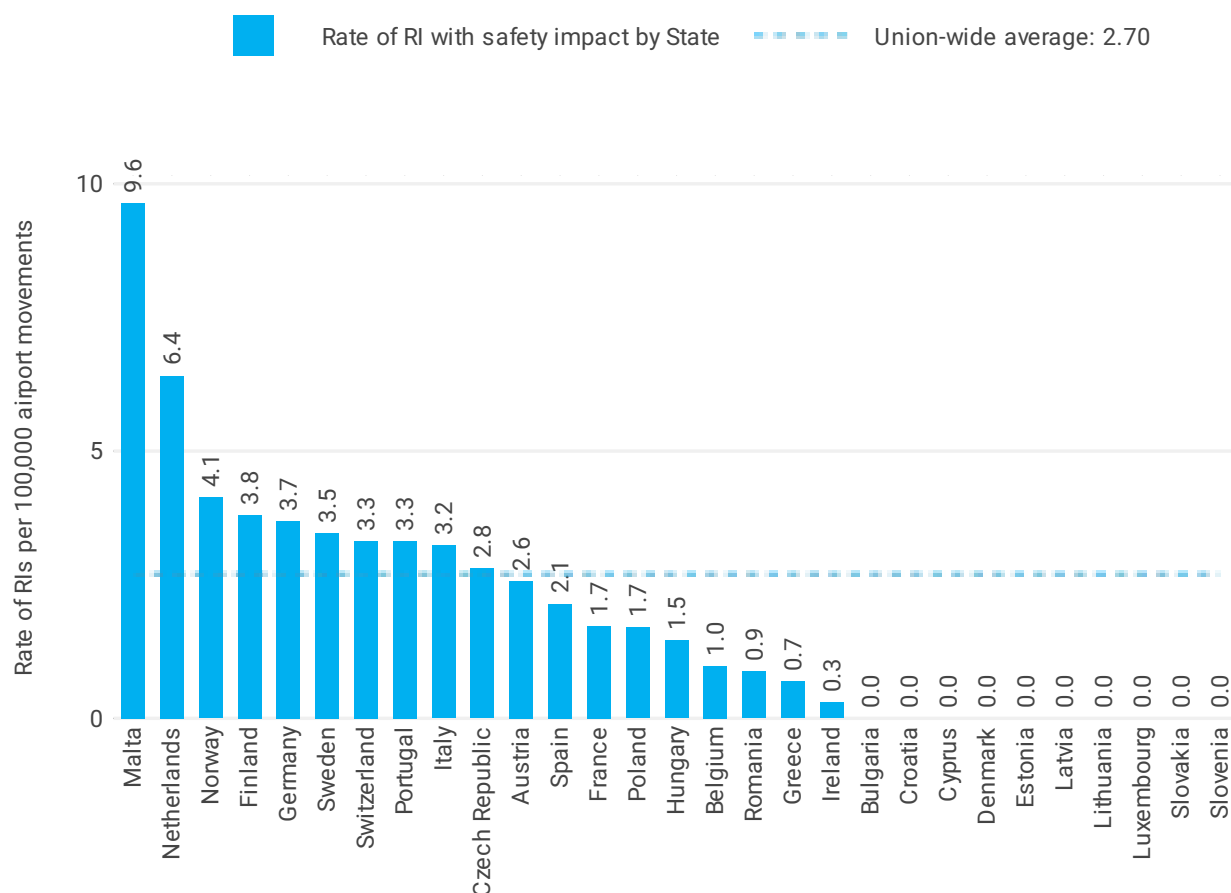
Six ANSPs reached the most demanding target, Level D, for the Safety Risk Management objective. Among the other Management Objectives, which have a RP4 target level of C, 21 ANSPs achieved the target for Safety Culture, 23 ANSPs achieved the target for Safety Policy and Objectives, 19 ANSPs achieved the target for Safety Assurance, and 22 ANSPs achieved the target for Safety Promotion.

Interdependency

The Component “Interdependencies, Resilient System Performance, Buffers and Trade-offs” proved particularly critical during RP3 and is expected to remain so throughout RP4. ANSPs continue to face complex operational and strategic challenges arising from shifts in traffic flows caused by Russia’s war of aggression against Ukraine and the geopolitical situation in the Middle East. In 2025, 2 ANSPs were assessed at levels A, 13 were assessed at levels B, 18 were assessed at levels C and 5 at level D.

2.3 Rate of runway incursions (RIs) (PI#1) and Rate of runway incursion with ANS contribution (PI#3)





Rate of RI per 100,000 airport movements

TOP 10 APTs in terms of movements					TOP 10 APTs in terms of total RIs					TOP 10 APTs in terms of rate of RIs				
#	Airport	Mvts.	Total RI	RI per 100,000 mvts.	#	Airport	Mvts.	Total RI	RI per 100,000 mvts.	#	Airport	Mvts.	Total RI	RI per 100,000 mvts.
1	Amsterdam	496,040	14	2.82	1	Hannover	75,697	21	27.74	1	Cuneo Levaldigi	3,682	3	81.48
2	Paris Charles de Gaulle	480,283	3	0.62	2	Eelde	60,106	15	24.96	2	Comiso Pio La Torre	2,497	2	80.10
3	Frankfurt	465,242	6	1.29	3	Munich	340,618	14	4.11	3	Beek	9,203	4	43.46
4	Madrid Barajas	430,785	12	2.79	4	Amsterdam	496,040	14	2.82	4	Erfurt	9,644	3	31.11
5	Barcelona	360,873	4	1.11	5	Lisbon	231,732	13	5.61	5	Hannover	75,697	21	27.74
6	Munich	340,618	14	4.11	6	Zürich	269,497	13	4.82	6	Istres-Le-Tubé	15,959	4	25.06
7	Rome Fiumicino	322,074	4	1.24	7	Madrid Barajas	430,785	12	2.79	7	Eelde	60,106	15	24.96
8	Athinai-Eleftherios Venizelos	290,104	2	0.69	8	Napoli Capodichino	93,901	11	11.71	8	Hyères-Le Palyvestre	22,157	5	22.57
9	Zürich	269,497	13	4.82	9	Gran Canaria	147,075	8	5.44	9	Pantelleria	4,578	1	21.84
10	Dublin	268,494	0	0.00	10	Cologne/Bonn	133,771	7	5.23	10	Albenga	6,475	1	15.44



Focus on runway incursions

RI rate

In 2025, the rate of runway incursion (RI) equalled 2.70 occurrences per 100,000 aircraft movements, a decrease from 3.8 in 2024 and therefore returning to the downward trend observed in previous years. The runway incursions with ANS contribution equalled 0.87 per 100,000 aircraft movements, a decrease from 0.95. Austria did not provide information on the runway incursions with ANS contribution. The absolute number of RIs decreased from 563 in 2024 to 351 in 2025 (-38%), while the number of RIs with ANS contribution decreased from 123 to 113 (-8%).

RI by Member State

Comparing absolute numbers and rates of occurrences between Member States and between airports must be done with caution. The number of occurrences reported is greatly dependent on the reporting culture of the organisation, the classification of occurrences, use of automated systems, etc. A high rate of occurrences in one Member State or airport is therefore not necessarily equal to a worsening performance compared with Member States or airports with lower rates.

Although the highest rate of RIs was recorded in Malta (9.64), only 7 occurrences were reported, and the highest rate is due to relatively low traffic volume at Malta airport. The Netherlands are at the second position with the rate 6.41 and Norway at third position with the rate 4.13. Both Member States recorded the increase on the rate to compare to the 2024. The lowest rate of RIs was recorded in Denmark and Luxembourg, where both Member States reported 0 RIs. Third lowest was Ireland, with rate of RIs of 0.29.

RI by Airport

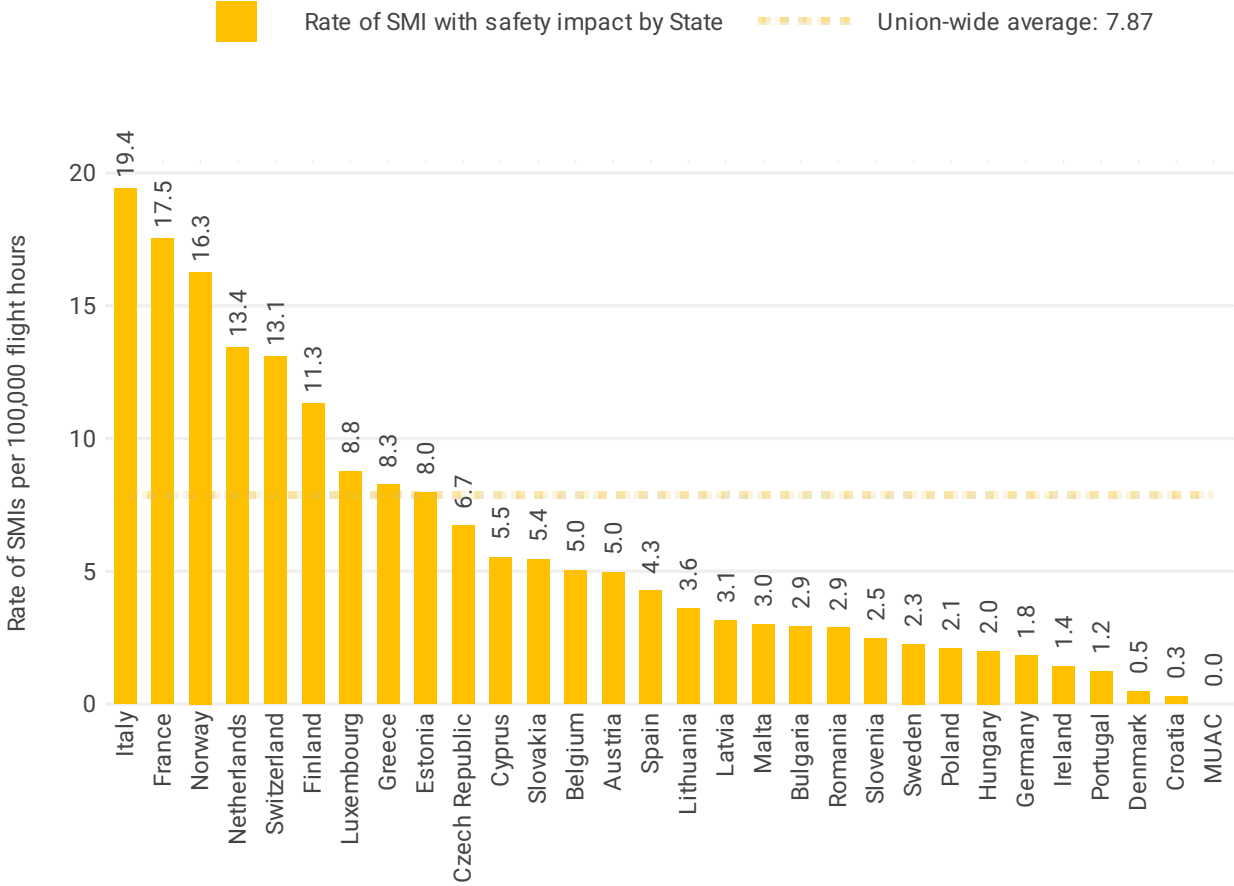
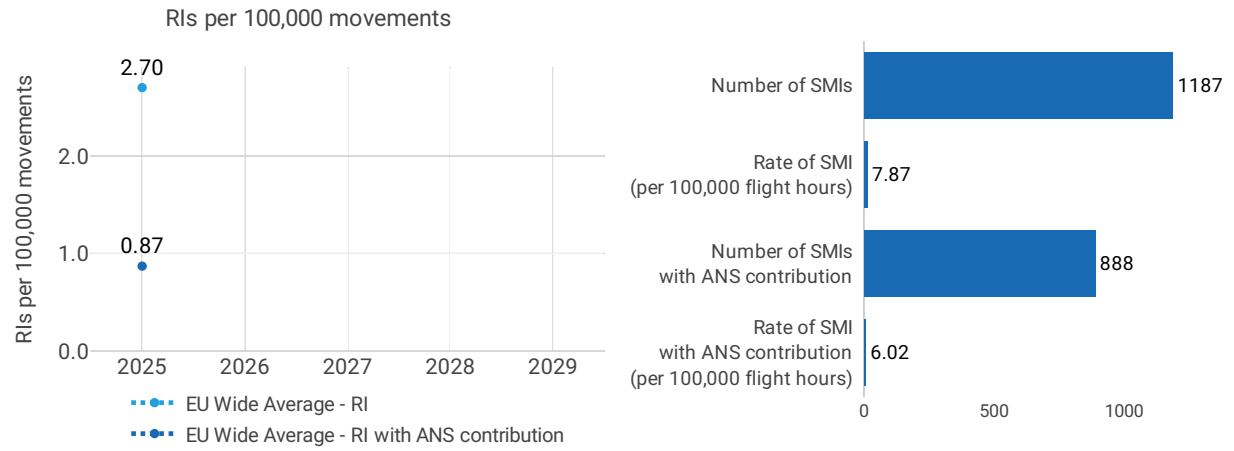
The analysis included 189 airports across multiple European countries. Of these, 89 airports (47.1%) reported 0 RI occurrences, while the remaining 99 airports reported at least one RI occurrence. Data for one airport were not reported.

The airports with the highest number of RI occurrences were Hannover (EDDV, 21 occurrences), Eelde (EHGG, 15), Munich (EDDM, 14), Amsterdam (EHAM, 14), and Lisbon (LPPT) and Zurich (LSZH) with 13 occurrences each.

When normalized by traffic volume, the highest RI rates per 100,000 movements were observed at LIMZ (Cuneo Levaldigi) (81.48), LICB (Comiso Pio La Torre) (80.10), EHBK (Beek) (43.46), EDDE (Erfurt) (31.11) and EDDV (Hannover) (27.74). These results indicate that while some major airports recorded the greatest number of RI occurrences due to their high traffic volumes, smaller regional airports often exhibited substantially higher occurrence rates when adjusted for traffic.



2.4 Rate of separation minima infringements (SMIs) (PI#2) and Rate of separation minima infringements with ANS contribution (PI#4)



Rate of SMI with ANS contribution per 100,000 flight hours											
#	ANSP	Flight hours					Number of SMIs with ANS contribution				
		2025	2026	2027	2028	2029	2025	2026	2027	2028	2029
1	DSNA	2,012,167	NA	NA	NA	NA	285	NA	NA	NA	NA
2	ENAIRE	1,941,651	NA	NA	NA	NA	133	NA	NA	NA	NA
3	ENAV	1,461,589	NA	NA	NA	NA	127	NA	NA	NA	NA
4	DFS	1,350,353	NA	NA	NA	NA	27	NA	NA	NA	NA
5	NAV Portugal	969,074	NA	NA	NA	NA	16	NA	NA	NA	NA
6	HASP	824,132	NA	NA	NA	NA	68	NA	NA	NA	NA
7	MUAC	645,144	NA	NA	NA	NA	2	NA	NA	NA	NA
8	LVNL	560,462	NA	NA	NA	NA	85	NA	NA	NA	NA
9	ROMATSA	522,107	NA	NA	NA	NA	10	NA	NA	NA	NA
10	BULATSA	443,333	NA	NA	NA	NA	12	NA	NA	NA	NA
11	PANSA	430,614	NA	NA	NA	NA	9	NA	NA	NA	NA
12	HungaroCont	400,559	NA	NA	NA	NA	8	NA	NA	NA	NA
13	Avinor	368,722	NA	NA	NA	NA	20	NA	NA	NA	NA
14	LFV NUAC	354,007	NA	NA	NA	NA	7	NA	NA	NA	NA
15	AirNav Ireland	348,569	NA	NA	NA	NA	4	NA	NA	NA	NA
16	Croatia Control	344,538	NA	NA	NA	NA	1	NA	NA	NA	NA
17	ANS CR	238,167	NA	NA	NA	NA	7	NA	NA	NA	NA
18	NAVIAIR	209,318	NA	NA	NA	NA	1	NA	NA	NA	NA
19	skeyes	204,151	NA	NA	NA	NA	19	NA	NA	NA	NA
20	CYATS	181,135	NA	NA	NA	NA	9	NA	NA	NA	NA
21	MATS	166,484	NA	NA	NA	NA	5	NA	NA	NA	NA
22	Skyguide	145,220	NA	NA	NA	NA	10	NA	NA	NA	NA
23	LPS SR	110,124	NA	NA	NA	NA	3	NA	NA	NA	NA
24	Fintraffic ANS	105,928	NA	NA	NA	NA	4	NA	NA	NA	NA
25	Slovenia Control	80,871	NA	NA	NA	NA	2	NA	NA	NA	NA
26	LGS	63,529	NA	NA	NA	NA	1	NA	NA	NA	NA
27	ITAF	63,348	NA	NA	NA	NA	5	NA	NA	NA	NA
28	EANS	62,640	NA	NA	NA	NA	4	NA	NA	NA	NA
29	ORO NAVIGACIJA	55,333	NA	NA	NA	NA	2	NA	NA	NA	NA
30	SKYWAY	52,792	NA	NA	NA	NA	0	NA	NA	NA	NA
31	Saerco	32,000	NA	NA	NA	NA	0	NA	NA	NA	NA
32	ANA LUX	11,415	NA	NA	NA	NA	1	NA	NA	NA	NA
33	ACR	NA	NA	NA	NA	NA	1	NA	NA	NA	NA
34	AFAB	NA	NA	NA	NA	NA	0	NA	NA	NA	NA
35	Austro Control	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
36	EA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
37	LFV	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
38	Port Lotniczy Bydgoszcz S.A.	0	NA	NA	NA	NA	0	NA	NA	NA	NA
39	SDATS	NA	NA	NA	NA	NA	0	NA	NA	NA	NA
40	Warmia i Mazury sp. z o.o.	0	NA	NA	NA	NA	0	NA	NA	NA	NA



		Rate of SMI with ANS contribution per 100,000 flight hours					% variation in rate of SMIs				
#	ANSP	2025	2026	2027	2028	2029	2025	2026	2027	2028	2029
1	DSNA	14	NA	NA	NA	NA					
2	ENAIRE	7	NA	NA	NA	NA					
3	ENAV	9	NA	NA	NA	NA					
4	DFS	2	NA	NA	NA	NA					
5	NAV Portugal	2	NA	NA	NA	NA					
6	HASP	8	NA	NA	NA	NA					
7	MUAC	0	NA	NA	NA	NA					
8	LVNL	15	NA	NA	NA	NA					
9	ROMATSA	2	NA	NA	NA	NA					
10	BULATSA	3	NA	NA	NA	NA					
11	PANSA	2	NA	NA	NA	NA					
12	HungaroCont	2	NA	NA	NA	NA					
13	Avinor	5	NA	NA	NA	NA					
14	LFV NUAC	2	NA	NA	NA	NA					
15	AirNav Ireland	1	NA	NA	NA	NA					
16	Croatia Control	0	NA	NA	NA	NA					
17	ANS CR	3	NA	NA	NA	NA					
18	NAVIAIR	0	NA	NA	NA	NA					
19	skeyes	9	NA	NA	NA	NA					
20	CYATS	5	NA	NA	NA	NA					
21	MATS	3	NA	NA	NA	NA					
22	Skyguide	7	NA	NA	NA	NA					
23	LPS SR	3	NA	NA	NA	NA					
24	Fintraffic ANS	4	NA	NA	NA	NA					
25	Slovenia Control	2	NA	NA	NA	NA					
26	LGS	2	NA	NA	NA	NA					
27	ITAF	8	NA	NA	NA	NA					
28	EANS	6	NA	NA	NA	NA					
29	ORO NAVIGACIJA	4	NA	NA	NA	NA					
30	SKYWAY	0	NA	NA	NA	NA					
31	Saerco	0	NA	NA	NA	NA					
32	ANA LUX	9	NA	NA	NA	NA					
33	ACR	NA	NA	NA	NA	NA					
34	AFAB	NA	NA	NA	NA	NA					
35	Austro Control	NA	NA	NA	NA	NA					
36	EA	NA	NA	NA	NA	NA					
37	LFV	NA	NA	NA	NA	NA					
38	Port Lotniczy Bydgoszcz S.A.	NA	NA	NA	NA	NA					
39	SDATS	NA	NA	NA	NA	NA					
40	Warmia i Mazury sp. z o.o.	NA	NA	NA	NA	NA					



Focus on separation minima

SMIs rate

In 2025, the rate of separation minima infringements (SMIs) equalled 7.87 occurrences per 100,000 aircraft movements, a decrease from 9.75 in 2024. The SMIs with ANS contribution equalled 6.02 per 100,000 aircraft movements, a decrease from 6.74. Austria did not provide information on the SMIs with ANS contribution.

A significant drop was observed in SMIs occurrences, decreasing from 1464 in 2024 to 1187 in 2025 (-19%). Similarly, the SMIs occurrences with ANS contribution decreased from 982 to 888 (-10%).

SMIs by Member State

Comparing absolute numbers and rates of occurrences between Member States and ANSPs for SMIs must be done with caution. The number of occurrences reported is much dependent on the reporting culture of the organisation, the classification on occurrences, use of automated systems, etc. A high rate of occurrences in one Member State or ANSP is therefore not necessarily equal to a worse performance compared with Member States or ANSPs with lower rates.

Based on the reported SMI data, the Member States with the highest number of SMI occurrences were France (353 occurrences), Italy (296), the Netherlands (106), Spain (85) and Greece (68). The lowest number of SMIs were recorded by Croatia, Denmark and Luxembourg with 1 SMI each and Latvia, Lithuania, and Slovenia with 2 SMIs each.

When normalized by controlled flight hours, the highest occurrence rates were recorded by Italy (19.41), France (17.54), and Norway (16.27). On the opposite, the lowest occurrence rates were recorded by Croatia (0.29), Denmark (0.48) and Portugal (1.24).

SMIs with ANS contribution by ANSP

Based on the reported data, the ANSPs with the highest number of SMI occurrences with ANS contribution were DSNA (285 occurrences), ENAIRE (133), ENAV (127), LVNL (85) and HASP (68). The lowest number of SMIs with ANS contribution (0) were recorded by Arvidsjaur AB (AFAB), Saab Digital ATS (SDATS), Port Lotniczy Bydgoszcz S.A., Warmia i Mazury Sp. z o.o., Saerco, and Skyway.

When normalized by controlled flight hours, the highest rate of SMIs with ANS contribution in 2025 has been recorded in the LVNL airspace (15.1), followed by DNSA (14.1), and Skeyes (9.3). On the opposite side, aside the ANSPs that recorded 0 SMIs with ANS contribution, the lowest rates were recorded by Croatia Control (0.29), MUAC (0.31), and Naviair (0.48).



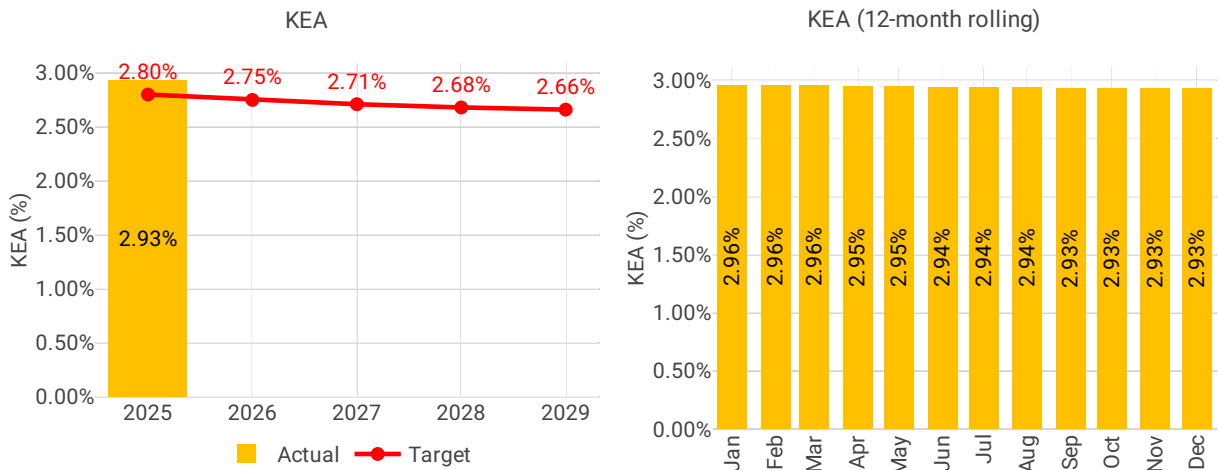
3 ENVIRONMENT - SES RP4

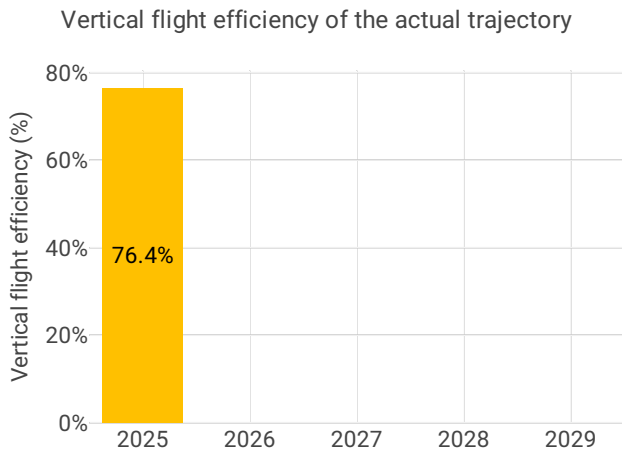
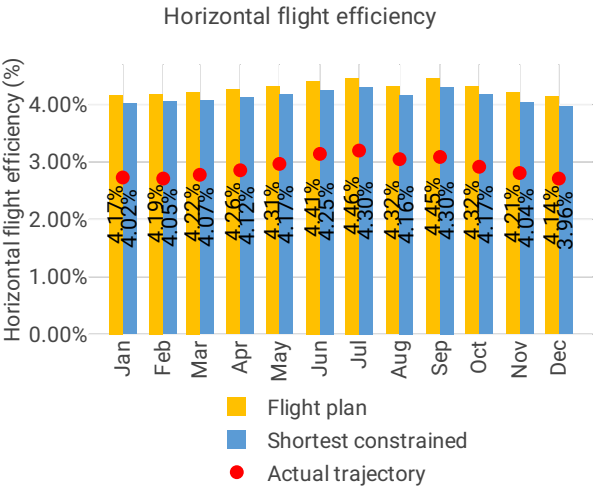
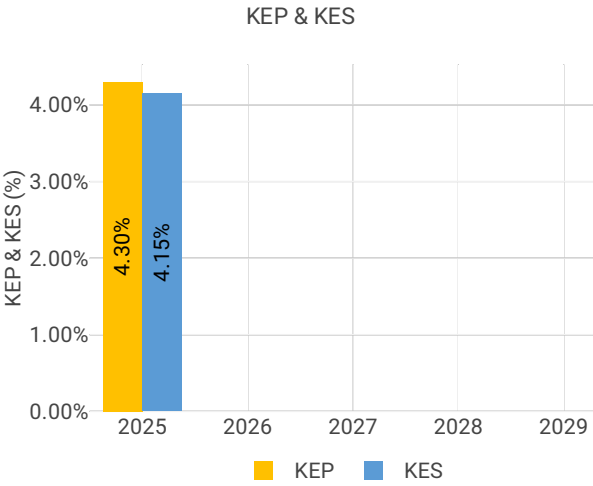
3.1 PRB monitoring

- The Union-wide horizontal flight efficiency (KEA) performance target was not achieved (2.93% compared to the target of 2.80%). 13 Member States did not achieve their local targets. Additionally, FABEC did not achieve their local target of 2.89%. All Member States in FABEC achieved their local breakdown values apart from France.
- The third full year of Russia’s war of aggression against Ukraine continues to affect the environmental performance, but marginally less than previous years (2.93% in 2025 compared to 2.96% in 2024).
- The VFE of the actual trajectory was at 76.4%.
- For terminal airspace, additional ASMA (arrival sequencing and metering area) time increased and additional taxi-out time decreased. Combined, this shows a +0.1 min increase compared to 2024, driven by additional ASMA time. Additional AXIT time was at 1.62 min (+0.03 min compared to 2024).
- The average time in level flight during decent and climb remained stable year-on-year, with a slight increase from 2024 levels.

3.2 En route performance

3.2.1 Horizontal flight efficiency of the actual trajectory (KEA) (KPI#1), of the last filed flight plan (KEP) (PI#1) , shortest constrained route (KES) (PI#2) and vertical flight efficiency of the actual trajectory (VFE) (PI#3)





3.2.2 Summary of performance at local level

KEA (%)				
State	Target	Actual		
Austria	2.09	1.99		✗
Belgium	3.50	3.35		✗
Bulgaria	3.33	3.38		✓
Croatia	1.46	1.47		✓
Cyprus	4.48	4.52		✓
Czech Republic	2.54	2.45		✗
Denmark	1.43	1.44		✓
Estonia	6.54	5.75		✗
Finland	3.38	3.71		✓
France	2.87	3.31		✓
Germany	2.62	2.47		✗
Greece	2.11	2.15		✓
Hungary	2.10	2.10		✗
Ireland	1.42	1.63		✓
Italy	2.75	3.03		✓
Latvia	7.96	7.15		✗
Lithuania	13.13	11.41		✗
Malta	1.56	1.67		✓
Netherlands	2.92	2.84		✗
Norway	1.28	1.60		✓
Poland	4.51	4.71		✓
Portugal	1.48	1.71		✓
Romania	3.54	3.70		✓
Slovakia	4.01	4.27		✓
Slovenia	1.70	1.58		✗
Spain	2.86	3.23		✓
Sweden	1.73	1.71		✗
Switzerland	4.34	4.14		✗
FABEC	2.89	3.06		✓

Focus on en route performance

KEA

Environmental performance is measured through the Horizontal en route flight efficiency of the actual flight path (KEA). KEA measures the additional distance flown in addition to the great circle distance. Additional distance flown is impacted by the trajectory planned by airspace users and by airspace restrictions and ATM measures including air traffic flow management (ATFM)-related restrictions to reduce delay. The higher the KEA value, the worse the performance.

In 2025, the Union-wide target for environment was 2.80%. Actual value was 2.93%, therefore the target was not achieved by 0.13 percentage points. The impact of the capacity shortfall (estimated at 0.1 percentage points) was not the only reason for not achieving the Union-wide KEA target. The Union-wide target would still have been missed by 0.03 percentage



points when accounting for these issues. However, this gap between the target and the actual performance has reduced since 2024 by 0.43 percentage points. As highlighted in earlier monitoring reports, this demonstrates that ANSPs and Member States must continue taking action and implement initiatives, including cross border Free Route Airspace where applicable, to improve horizontal flight efficiency and to focus on the interdependency between the environment and capacity KPAs by resolving capacity bottlenecks.

The PRB estimates that over 11 million kilometres of additional distance were flown in 2025 as a result of missing the Union-wide target by 0.13 percentage points. The excess fuel burn in 2025 equates to approximately 50 million kilograms of fuel or some 158 million kilograms of CO₂.

Summary of performance at local level

In 2025, 12 Member States achieved their KEA targets, some with a considerable margin, others closer to the target: Austria, Belgium, Czech Republic, Estonia, Germany, Hungary, Latvia, Lithuania, the Netherlands, Slovenia, Sweden, and Switzerland. The Baltic States, who also have a higher KEA target due to Russia's war of aggression against Ukraine, achieved their KEA with the highest margin.

- Lithuania achieved a KEA of 11.41% (1.72 p.p. better than the target of 13.13%).
- Latvia achieved a KEA of 7.15% (0.81 p.p. better than the target of 7.96%).
- Estonia achieved a KEA of 5.75% (0.79 p.p. better than the target of 6.54%).

Conversely, 16 Member States did not achieve their targets:

- Five Member States were within 0.1 percentage points of their targets: Bulgaria, Croatia, Cyprus, Denmark, and Greece.
- Seven Member States missed their targets by between 0.1 and 0.3 percentage point: Ireland, Italy, Malta, Poland, Portugal, Romania, and Slovakia. The KES also degraded or stayed the same for all but Romania.
- The remaining four Member States missed their targets by more than 0.3 percentage point: Finland, France, Norway, and Spain. Among this group, only Spain's performance has improved slightly (both KEA and KES) compared to 2024. On the other side, the targets included an allowance for the impact on Ukraine, however Finland still noted that the target was not achieved due to the shift in traffic flows from Russia to Kaliningrad, as a result of the airspace closure.

KEP and KES

KEP measures the efficiency of the routes planned by airspace users according to their own planning tools and criteria. **KEP is one of two performance indicators that help explain Union-wide environmental performance, in addition to measuring horizontal flight efficiency. Although it does not directly relate to fuel burn or CO₂ emissions, it helps explain the constraining factors that limit horizontal flight efficiency.**

KES is the other of the two performance indicators that help explain Union-wide environmental performance, in addition to measuring horizontal flight efficiency. KES does not directly relate to fuel burn or CO₂ emissions, but it helps explain the constraining factors that



limit horizontal flight efficiency. KES is relevant because environmental performance correlates with traffic levels and available capacity. It considers the available airspace, including capacity and restrictions, during the flight planning stage. It therefore reflects the options airspace users had when planning their flights.

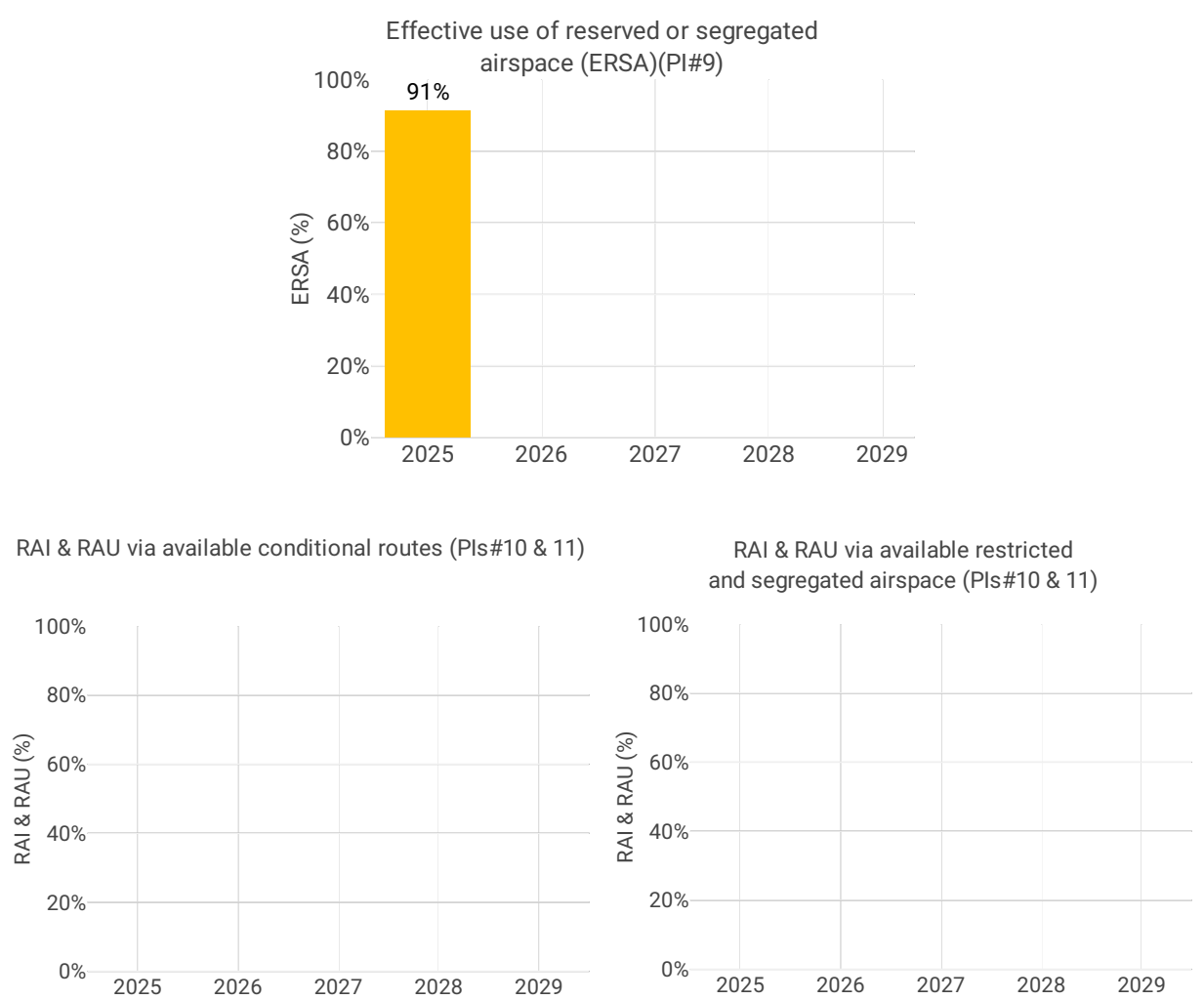
Both KEP (from 4.35% in 2024 to 4.3% in 2025) and KES (from 4.19% in 2024 to 4.15% in 2025) improved in 2025. The gap between KEP and KES is the smallest that it has ever been. This slight improvement could be due to the airspace effectively adjusting to account for new route restrictions. The gap between KEP and KES has decreased each year since 2020, showing that airspace users are planning routes increasingly closer to the shortest route available.

VFE

This performance indicator, which is new for RP4, measures how closely an aircraft’s flown vertical profile matches its planned path. During the en route phase the indicator measures flights cruising at inefficient levels below the optimal, last-filed flight plan altitude.

For 2025 the en route VFE was at 76.4%. Since it is the first year of measuring this indicator, there is no historical data. Ireland had the highest score (80.8%), while Cyprus had the lowest score (66.9%) among the Member States.

3.3 Civil-Military dimension



4 CAPACITY - SES RP4

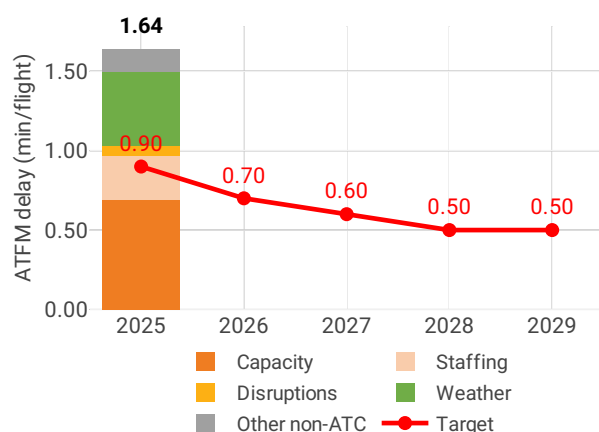
4.1 PRB monitoring

- The average en route ATFM delay per flight in 2025 was 1.64 minutes, 0.74 minutes above the target. Average delays showed a significant reduction compared to the 2.19 minutes per flight in 2024. Delays were also below 2022 levels despite 19% more traffic.
- For 19 ANSPs, average en route ATFM delays in 2025 were lower than or equal to 2024. For a further five ANSPs, average delays were still below 0.05 minutes per flight despite a minor increase.
- Of the seven ANSPs that did not meet their local en route capacity target in 2025, five ANSPs managed to improve their performance compared to 2024.
- Similar to the previous years, the main causes of delay in 2025 were ATC Capacity, weather and ATC Staffing.
- A significant proportion of the 0.55 minutes decrease in average delays in 2025 compared to 2024 was due to reductions in delays related to weather (-0.30) and other non-ATC reasons (-0.10).
- While noting that the scope of airports included in the RP4 performance plans is not fully aligned with the scope of RP3, Union-wide terminal capacity performance in 2025 was comparable to 2024, with an average delay of 0.97 minutes per flight in 2025 and 0.93 minutes per flight in 2024. The contribution of delays due to weather and non-ATC related airport capacity problems remained high at 75% of total arrival ATFM delays. ATC Capacity was responsible for a further 19% of delays.

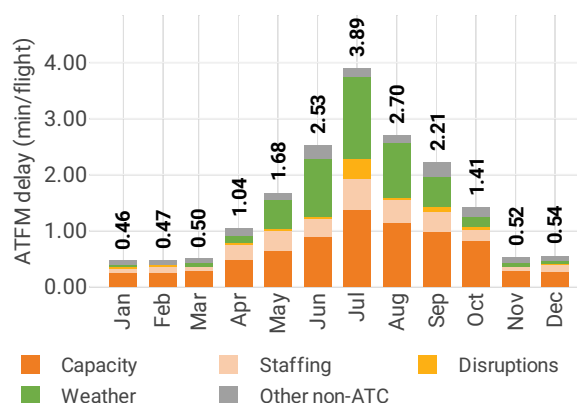
4.2 En route performance

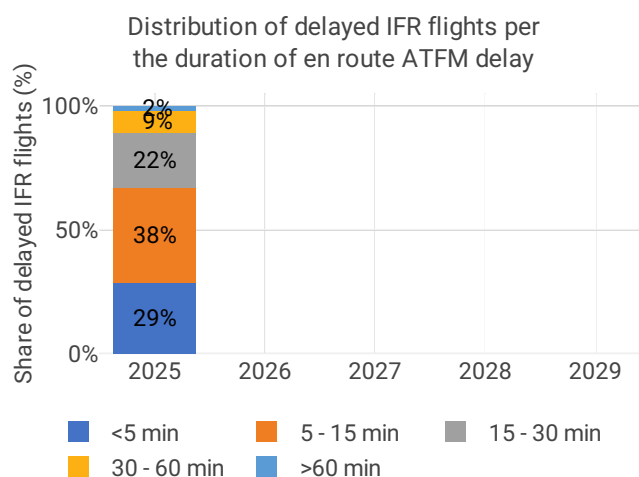
4.2.1 En route ATFM delay (KPI#1)

Average en route ATFM delay per flight by delay groups



Monthly distribution of en route ATFM delay by delay groups - 2025





Focus on en route ATFM delay

En route ATFM delay

En route capacity is monitored by the average en route air traffic flow management (ATFM) delay generated by en route area control centres (ACCs). In 2025, the Union-wide target for en route capacity was 0.90 minutes of delay per flight.

The target was not achieved in 2025: the actual average en route ATFM delay was 1.64 minutes per flight (after post-ops adjustments), 0.74 minutes per flight above the Union-wide target. One factor in this performance was the inability of some ACCs to accommodate the local increase in IFR movements – either the general increase or strong peaks in the traffic profile. Other contributing factors are remaining structural issues in a number of areas of the airspace, and delays due to weather, which were lower than in 2024 but still significant.

The traffic demand at network level in 2025 was +4.2% above 2024 traffic, and equalled 2019 traffic for the first time since the Covid pandemic. Despite the traffic growth, en route ATFM delay per flight in 2025 was 25% lower than in 2024. This improvement is encouraging, but it should be acknowledged that a notable part of the reduction in delays was due to the reduced impact of weather and other non-ATC causes. On the other hand, the general improvement is underlined by the fact that the performance of 19 of the 29 ANSPs improved (including improvement in five of the seven ANSPs that did not meet their local target).

Compared to 2024, total delay minutes decreased by -22% to 16.3M. Average delay per flight decreased from 2.19 min/flight in 2024 to 1.64 min/flight in 2025. Main contributors to this -0.55 min/flight reduction in average delays are weather (-0.30 min/flight), ATC capacity (-0.10 min/flight) and other non-ATC (-0.10 min/flight). The main cause of delay in 2025 remains lack of ATC capacity (42% of all delay minutes), followed by weather (28%) and ATC staffing (17%).

A large majority of the delays in 2025 were accumulated during the summer season, with a clear peak in July, when the average delay was 3.87 min/flight. The improvement in performance compared to 2024 was also visible here, as the peak in July 2024 was 5.85 min/flight. Similar reductions occurred in June (4.06 in 2024; 2.52 in 2025) and August (4.38 in 2024; 2.69 in 2025).

Although the reduction in delays due to weather played a large role in the performance improvement, this is not only due to a reduction in disruptive weather events. Improved handling of the impact of such events, for example at network level through the introduction of



the Capacity and Weather Based Operations (CWBO) procedures introduced by the Network Manager for summer 2025, has had a positive effect.

Improvements in Union-wide performance are also visible in other indicators related to average en route ATFM delays: the average delay per delayed flight decreased from 16.89 min/flight to 14.69 min/flight, the share of flights experiencing any ATFM delay reduced from 12.9% to 11.1%, and the share of delayed flights experiencing an ATFM delay of more than 15 minutes reduced from 4.9% to 3.7%.

En route incentive scheme

Based on the parameters defined by the Member States in their performance plans and their respective 2025 performance in en route capacity, 15 ANSPs are eligible for a bonus – however, for four of these ANSPs the maximum bonus has been set to 0%, meaning there is no financial effect. Six ANSPs are subject to a financial penalty. The total amount of bonuses equals 20.9M€, while total penalties amount to -23.3M€, giving a net effect at network level of -2.4M€ to be returned to users.



4.2.2 Summary of performance at local level

En route delay (min/flight)			
State	Target	Actual	
Austria	0.28	0.41	✗
Belgium	0.22	0.08	✓
Bulgaria	0.24	0.05	✓
Croatia	0.29	0.42	✗
Cyprus	0.17	0.03	✓
Czech Republic	0.19	0.08	✓
Denmark	0.10	0.11	✗
Estonia	0.06	0.01	✓
Finland	0.05	0.00	✓
France	0.44	1.89	✗
Germany	0.39	0.95	✗
Greece	0.34	0.89	✗
Hungary	0.85	0.58	✓
Ireland	0.03	0.01	✓
Italy	0.28	0.07	✓
Latvia	0.06	0.01	✓
Lithuania	0.03	0.00	✓
Malta	0.03	0.03	✓
Netherlands	0.16	0.14	✓
Norway	0.16	0.04	✓
Poland	0.24	0.17	✓
Portugal	0.30	0.28	✓
Romania	0.24	0.04	✓
Slovakia	0.20	0.08	✓
Slovenia	0.17	0.10	✓
Spain	0.38	0.95	✗
Sweden	0.18	0.02	✓
Switzerland	0.36	0.25	✓
FABEC	0.63	1.67	✗

Focus on performance at local level

En route performance at local level

A limited number of ACCs registered a significant increase in delays. The following ACCs with 2025 delays above 0.15 min/flight saw clear increases:

- In France, delays in Brest ACC and Marseille ACC increased by +52% and +102% respectively. In Brest, the increase was mainly due to weather and 'other' causes, i.e. capacity reduction due to ATM system implementation and associated training. In Marseille ACC the increase was to a very large extent driven by ATC capacity issues, which caused an additional 1.5 million minutes of delay compared to 2024.
- In Spain, delays increased in Madrid ACC by +37%, due to a combination of a lack of ATC capacity and 'other' causes, in particular military exercises.



- Delays in MUAC increased by +37%, with in particular ATC capacity issues increasing significantly. These issues were mostly linked to traffic shifts within MUAC-controlled airspace from the Netherlands to Belgium.

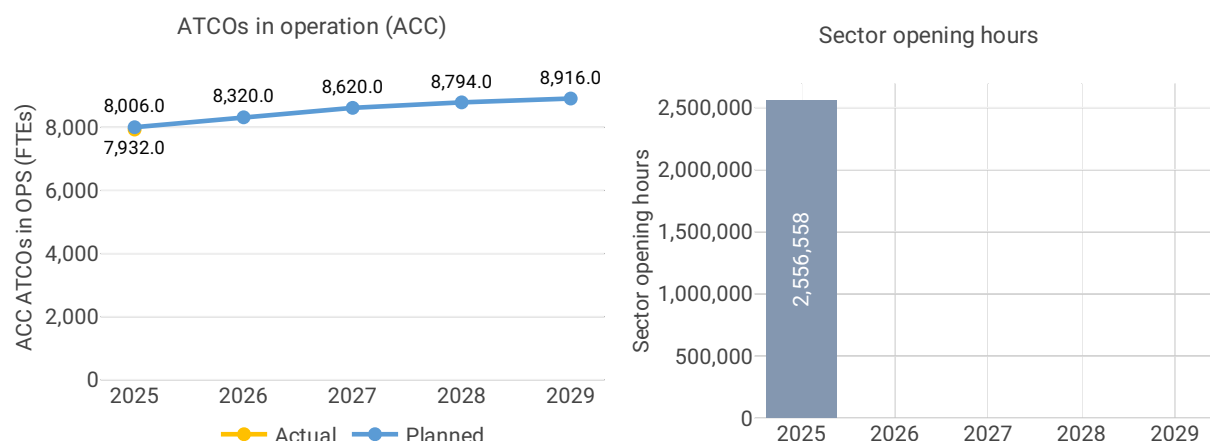
Consistent with Union-wide performance, there were notable improvements in a number of ACCs. Clear reductions in delays were observed in the ACCs listed below, which all showed a performance above 0.15 min/flight (meaning that in a number of cases they still experienced relatively high delays, despite improvements):

- For several ACCs, the improvements were due to reduced ATC capacity issues in combination with reduced impact of adverse weather conditions: average delays decreased by -35% in Bremen ACC, by -52% in Canarias ACC, by -47% in Karlsruhe UAC, and by -76% in Zagreb ACC.
- ATC capacity and weather were also the main contributors to improvements in Vienna ACC, but the improvements were partly countered by increased delay due to ATC staffing issues, resulting in an overall reduction of average delays by -24%.
- In Paris ACC, the reduced average delays (-34%) were largely due to the absence of 'other' causes (ATM system implementation) that affected 2024 performance. ATC capacity issues in fact increased in 2025 compared to 2024.
- In Budapest ACC, average delays decreased by -79% due to reduced impact of 'other' causes (complexity resulting from the closure of Ukraine airspace) in addition to fewer delays due to ATC capacity and weather.
- In Warsaw ACC, the -25% reduction in average delay was due to a combination of lower delays due to ATC capacity and staffing but higher delays due to 'other' causes (ATFM trials and complexity resulting from the closure of Ukraine airspace).
- Sevilla ACC showed a significant reduction in ATC capacity issues, leading to -37% lower average delay.
- In Geneva ACC (-33% average delays) and Zurich ACC (-42%) the improvement was mainly due to the absence of disruptions which occurred during 2024.

Although average en route ATFM delays were still well above the target in 2025, actual performance shows an improvement compared to 2024 and also breaks the trend of increasing delays in the post-Covid years 2022-2024. These improvements have been achieved while traffic increased by 4.2%. However, in some parts of the network capacity is still insufficient to deal with strong traffic growth, especially during peak periods.



4.2.3 Other en route information



Focus on other en route information

Staffing

The following analysis is based on planned and reported actual ATCOs at ACC level. Austria did not report relevant ATCO numbers for 2025. Additionally, the reports of some Member States give rise to questions regarding the scope of the numbers provided. Austria has been excluded from the analysis, for all other States the figures are used as provided in the annual monitoring reports for 2025 despite these concerns.

At Union-wide level, the reported number of ATCOs is -61, or -0.8%, below the planned number. However, this Union-wide result is strongly influenced by the fact that the number of ATCOs reported by France is +80 above the plans. Excluding France, the reported number of ATCOs at Union-wide level is -2.1% below planned number.

The difference between reported and planned numbers ranges from +6.3% for Lithuania to -11.5% for Greece. Only seven States report a higher number of ATCOs than planned, with 21 States (incl. MUAC) reporting fewer ATCOs than planned. Of these 21 States, eight report the number of ATCOs being -5% or more below the planned number.

There was no clear link in 2025 between average en route ATFM delays and deviations between reported and planned ATCOs. Of the seven States that did not meet their capacity targets (noting that this includes Austria, which did not report ATCO numbers), only three report ATCO number being -5% or more below planned levels, while two of these States in fact report more ATCOs than planned.

Most States meeting their en route capacity targets shows that in general ANSPs, often in coordination with the NM, manage to take the necessary measures to provide sufficient capacity despite the ATCO shortage. However, at the same time such measures confirm the need to close the gap between planned and actual ATCO numbers because of the limits to the applicability or benefits of the measures taken. For example, some Member States report temporary agreements with ATCOs which by definition cannot be structural solutions, while others mention optimisation of rostering and shifts which enhances availability of existing resources but has limits in terms of potential further optimisation.

When analysing the ATCOs in training, it is worrying that Member States report -7.4% fewer ATCOs in training than planned at the end of 2025, the first year of the reference period.



Specifically, 10 States which already report a shortage of ATCOs, also report fewer ATCOs trainees than planned.

Sector opening hours

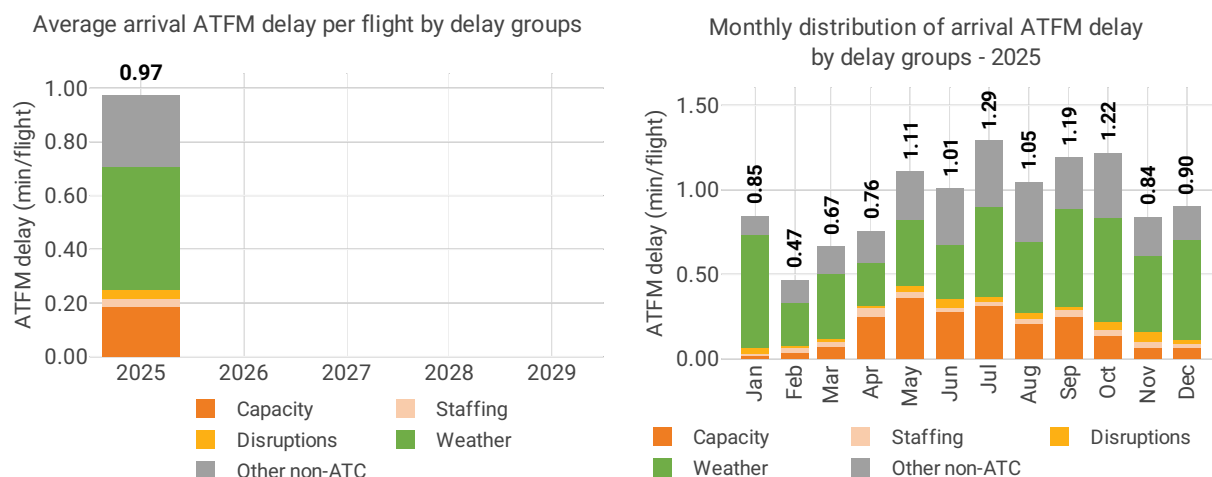
At Union-wide level, the sector opening hours decreased by -2.3% in 2025, despite the traffic increase at network level (4.2%). However, behind this figure there is a significant variation in the situation at the level of individual ACCs, ranging from a +26% increase in sector opening hours in Malta and Prague ACC to a -36% decrease in Oslo ACC.

The number of IFR movements handled per sector opening hour can be seen as an indication of operational efficiency of an ACC, although there are various issues that may influence this ratio. Increasing the number of sector opening hours at a higher rate than the increase in traffic can contribute to reducing delays, but it will also reduce the operational efficiency determined through this ratio. Furthermore, reducing the number of sector opening hours may be necessary during periods of e.g. major system replacements, leading to a temporary change in the IFR movements to sector opening hours ratio. Additionally, calculating this ratio at an annual level may not reflect the impact of peak traffic periods during the year.

In 10 ACCs, the number of IFR movements handled per sector opening hour decreased in 2025 compared to 2024. In six of those ACCs, delays decreased or remained stable, which suggests that increasing sector opening hours at a higher rate than traffic growth contributed to closing the capacity gap and therefore any perceived reduction in operational efficiency is outbalanced by improved capacity performance. Only in Copenhagen, Reims, Barcelona and Madrid ACCs did delays increase clearly despite reduced IFR movements per sector opening hour.

4.3 Terminal performance

4.3.1 Arrival ATFM delay (PI#1)



4.3.2 Summary of performance at local level

Arrival delay (min/flight)			
State	Target	Actual	
Belgium	1.50	0.77	✓
France	0.65	1.02	✗
Germany	0.43	0.37	✓
Luxembourg	0.20	0.15	✓
Netherlands	2.20	4.44	✗
Switzerland	1.60	2.07	✗
Sweden	0.35	0.01	✓
Malta	0.01	0.18	✗
Poland	0.06	0.48	✗
Austria	0.53	0.66	✗
Romania	0.40	0.17	✓
Spain	0.60	0.93	✗
Portugal	2.19	1.88	✓
Norway	0.50	0.13	✓
Ireland	0.20	0.28	✗
Greece	1.50	5.46	✗
Denmark	0.20	0.55	✗
Czech Republic	0.40	0.56	✗
Hungary	0.10	0.04	✓
Italy	0.35	0.29	✓
Finland	0.14	0.18	✗

Focus on arrival ATFM delay

Terminal and airport ANS ATFM arrival delay per flight

Terminal capacity is monitored by one performance indicator at the Union-wide level, which is the average airport arrival ATFM delay. In 2025, the average Union-wide airport arrival ATFM delay was 0.97 minutes per flight.

The average arrival ATFM delay in 2025 was comparable to 2024, which was 0.93 minutes per flight (due to limited differences in the airports in scope in RP3 and RP4, these figures cannot be compared directly). The top 20 busiest airports in 2025 experienced a +3.5% increase in IFR arrivals on average compared to 2024, while experiencing a +10.4% increase in total arrival ATFM delay minutes. Average arrival ATFM delay per flight increased at six of the top 20 airports: Amsterdam, Paris CdG, Athens, Zurich, Palma de Mallorca, and Warsaw.

Weather and other non-ATC issues continue to account for a large proportion of the delays; in 2025 this was 75%. The majority of the airport arrival ATFM delay was generated between May and October, when average Union-wide arrival ATFM delays were consistently equal to or above 1 minute, although the seasonal pattern that can be observed clearly for en route ATFM delays is much less prominent for arrival ATFM delays. Where the ratio of highest to lowest average ATFM delays per month is 8.4 for en route, for arrival ATFM delay this is only 2.7 (July vs February for both cases). As was already noted for 2024, the pattern of



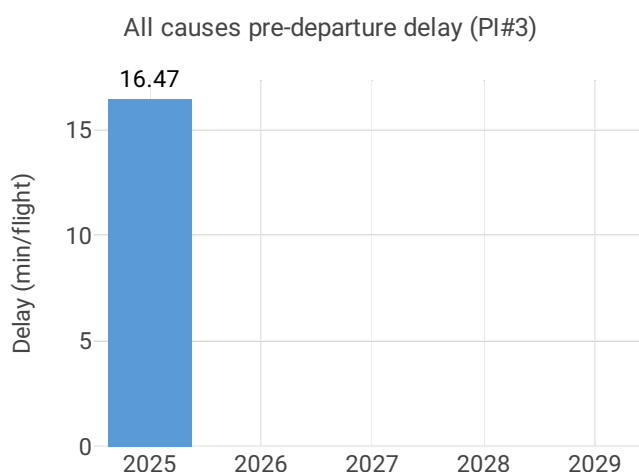
high delays occurring also outside the summer period reflects negatively on both network resilience and the predictability of network performance.

While taking into account that there is a limited difference in the airports in scope, average arrival ATFM delays for most causes remained stable, with only delays due to ATC capacity issues showing a clear increase, from 0.13 minutes per flight to 0.19 minutes per flight.

Terminal incentive scheme

For terminal capacity, based on the parameters defined in the performance plans, ten ANSPs are eligible for a bonus, with the maximum bonus for two ANSPs being set to 0% and therefore not having a financial effect. Seven ANSPs are subject to a financial penalty. The total bonuses amount to 2.3M€, whereas the sum of penalties is -4.1M€, giving a net effect of -1.8M€ to be returned to users.

4.3.3 Other terminal performance indicators



Focus on other terminal performance indicators

Average departure delay from all causes per flight

Average Union-wide all-causes pre-departure delays was 16.5 minutes in 2025. This is a significantly lower value (-12%) than what was measured in 2024, i.e. 18.8 minutes per flight. This difference is notable also because all-causes pre-departure delays in 2022 and 2023 were very similar to 2024 (19.0 and 19.2 respectively) despite much lower traffic volumes in those years. Although there is a limited differences in the airports in scope in RP3 and RP4, the reduction in average all causes pre-departure delays does point towards a clear improvement in performance. This is supported by the fact that at individual airport level, all causes pre-departure delays reduced by one minute or more for a strong majority of airports.

Gate-to-gate delay analysis

A gate-to-gate analysis that combines ATFM delays with other delay types and other sources of flight time extensions demonstrates the overall impact on performance. For this analysis, four performance indicators defined in the Regulation are used to illustrate gate-to-gate delays:

- All cause pre-departure delays, including en route ATFM delays and airport arrival ATFM delays;



- Additional taxi-in time;
- Additional taxi-out time; and
- Additional time spent in terminal area on arrival (Arrival Sequencing and Metering Area).

Based on these indicators, on average airspace users experienced a gate-to-gate delay of 22.9 minutes per flight in 2025 while in 2024 a gate-to-gate delay of 25.2 minutes per flight was measured (noting again that these figures cannot be compared directly due to limited differences in the airports in scope). Additional taxi-in and -out times and additional time spent in ASMA were all broadly the same in 2024 and 2025, and the gate-to-gate delay reduction is therefore almost completely due to reduced all-causes pre-departure delays.

Due to a combined reduction from 3.12 minutes per flight in 2024 to 2.61 minutes per flight in 2025, en route and airport ATFM regulations (i.e. the delays assessed under the Regulation and counted within the all causes departure delay group) contributed -0.5 minutes per flight to the -2.3 minutes per flight improvement to gate-to-gate delays in 2025.

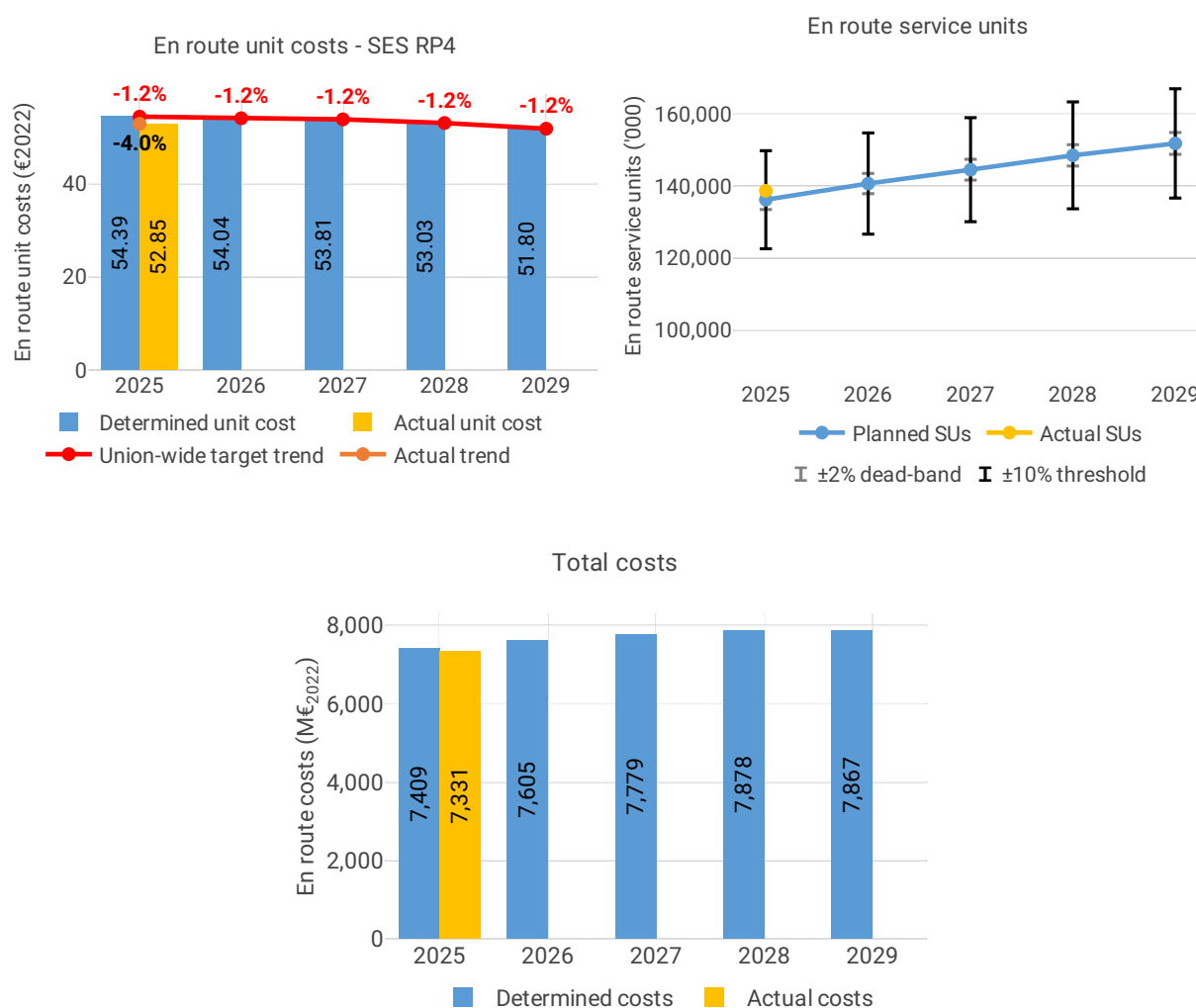


5 COST-EFFICIENCY - SES RP4

5.1 PRB monitoring

- The real en route actual unit cost (AUC) Union-wide was -2.8% lower than the determined unit cost (DUC).
- Real en route actual costs were -1.1% below determined costs, while actual service units were +1.8% higher than the determined service units.
- The en route actual unit cost incurred by airspace users (AUCU) was -2.1% lower than the DUC, mainly stemming from other revenues.

5.2 En route charging zone

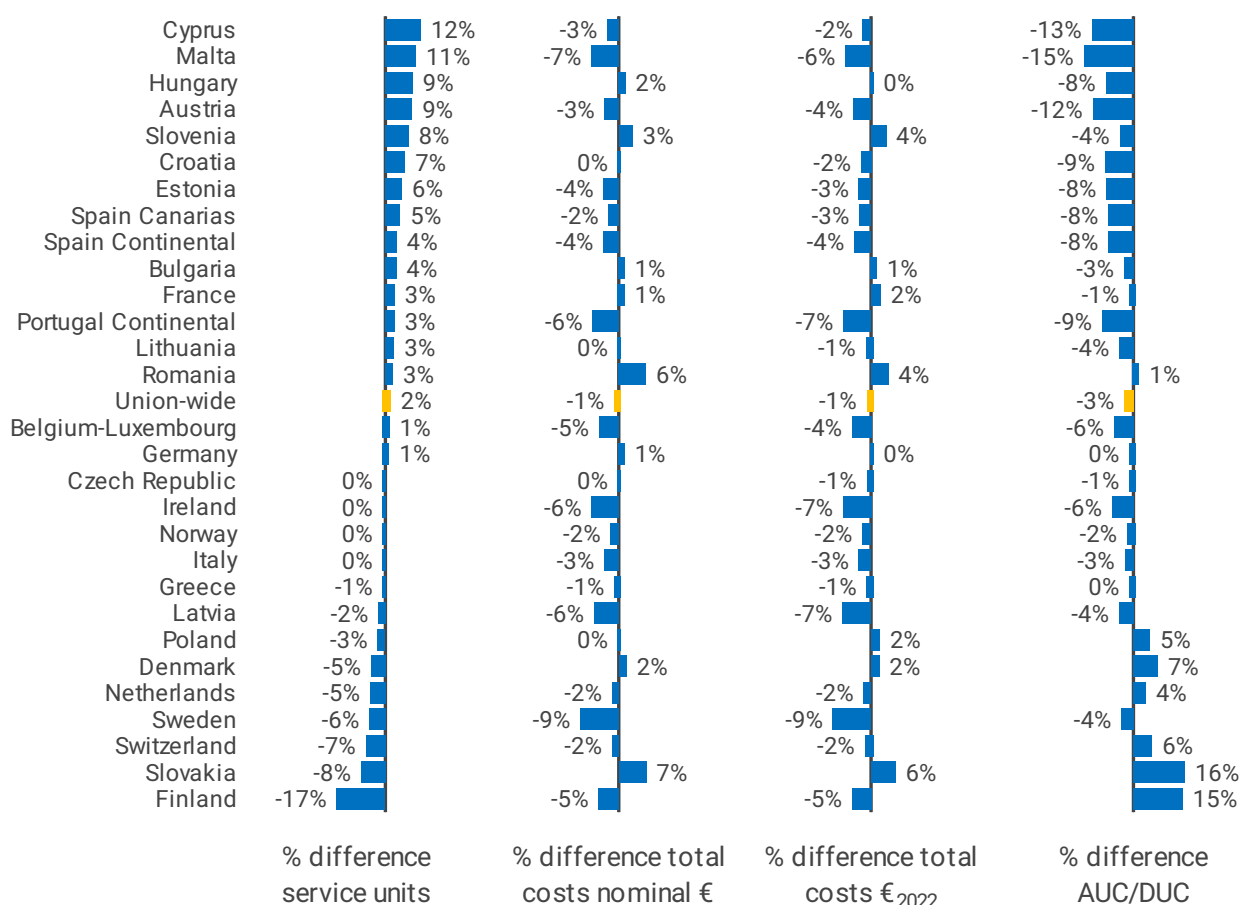


Actual and determined data

Total costs - nominal (M€)	2025	2026	2027	2028	2029
Determined costs	8,063.3	8,408.9	8,735.5	8,981.4	9,107.2
Actual costs	7,981.7	NA	NA	NA	NA
Difference costs	-81.6	NA	NA	NA	NA



5.2.1 Summary of performance at local level



Focus on unit cost

Difference between actual and determined unit cost

The 2025 actual unit cost (AUC) variation from the 2024 baseline (-4.0%) is better than the variations derived from the Union-wide targets (-1.2%) and the RP4 performance plans (-1.2%). The resulting AUC (52.85€₂₀₂₂) is -2.8% lower than the Union-wide DUC from the RP4 performance plans (54.39€₂₀₂₂). The 2025 Union-wide AUC was better than the en route cost-efficiency target due to a combination of higher service units than planned (+1.8%) and lower actual costs than planned (-1.1%).

In terms of traffic, the comparison between actual and planned service units showed significant variations between Member States: En route service units were higher than planned for 16 charging zones, with notable differences in Cyprus (+12.2%), Malta (+10.5%), and Hungary (+9.5%), while for the remaining 13 charging zones the number of actual service units was below the plan, with the largest differences observed in Finland (-16.9%), Slovakia (-8.4%), and Switzerland (-6.8%). These marked differences were largely driven by the continued impact of Russia's war of aggression against Ukraine on traffic flows within the SES area, the effects of which have already been significant despite this being only the first year of RP4. In addition, the geopolitical situation in the Middle East also affected traffic patterns.

In terms of costs, 20 Member States incurred lower actual en route total costs than planned, with five of them by more than -5%. The Member States with the largest percentage reduc-



tion in actual costs were Sweden (-9.0%), Latvia (-6.8%) and Ireland (-6.6%). Only Slovakia increased actual costs by +5% or more compared to determined (+5.8%).

Difference in inflation between actual and determined

Actual cost in nominal terms and real terms has evolved at the same rate. In the first year of the reference period, actual inflation rates are broadly in line with the forecast inflation indexes.

Cost differences in Member States with approved capacity deviation plan for RP4

In their submitted performance plans, eight Member States initially presented a deviation from the criteria to achieve capacity targets (criterion d) i) of Section 1.4 of Annex IV of the Regulation). This deviation was considered justified for four Member States (Belgium-Luxembourg, Germany, Hungary, and Ireland). Out of these, two Member States reported lower actual costs compared to planned for 2025: Belgium-Luxembourg (-11.7M€₂₀₂₂, or -4.5%) and Ireland (-9.8M€₂₀₂₂, or -6.6%). The other two Member States reported 2025 actual costs broadly in line with the plan: Germany (+4.6M€₂₀₂₂, or +0.4%) and Hungary (+0.4M€₂₀₂₂, or +0.3%).

However, these four Member States have underspent in 2025 in the additional costs of measure necessary to achieve capacity targets. Belgium-Luxembourg has reported lower actual costs compared to determined (-1.8M€₂₀₂₂, or -9.7%), mainly due to lower depreciation (-1.8M€₂₀₂₂, or -83.5%) than planned. Germany has reported lower actual costs compared to determined (-14.1M€₂₀₂₂, or -28.1%), mainly due to lower staff costs (-12.2M€₂₀₂₂, or -42.2%) than planned. Hungary has reported lower actual costs compared to determined (-0.8M€₂₀₂₂, or -11.7%), mainly due to lower other operating costs (-0.7M€₂₀₂₂, or -18.9%) than planned. Ireland has reported lower actual costs compared to determined (-5.4M€₂₀₂₂, or -41.9%), mainly due to lower staff costs (-4.7M€₂₀₂₂, or -51.8%) than planned. Three of these four Member States achieved the 2025 en route capacity target, only Germany has not.

Verification of cost eligibility

The NSAs must ensure the eligibility of the costs charged as part of the cost base for air navigation charges: In Article 15(2) of Regulation (EU) 550/2004, the Member States/ANSPs are only allowed to include items in their cost base (determined costs) which are related to eligible air navigation services and facilities. In the monitoring reports, the NSAs were requested to report the findings of their verifications of actual costs, and where applicable, the corrections made to the actual costs following this verification. Two NSAs reported that they are still in the process of verifying costs (Poland, and Romania). Five NSAs reported corrections made to the actual costs after verification (Cyprus, Czech Republic, Finland, Germany, and Sweden). No corrections were reported by the remaining NSAs.

Six NSAs reported that the costs for non-ANS activities or ANS provided to third countries have been presented separately in the ANSPs accounts as required in Article 12(3) of Regulation 550/2004. Four NSAs (Denmark, Slovenia, Sweden, and Switzerland) did not provide sufficient information. Finally, most NSAs (19) reported that they had verified that such costs had been excluded from the en route cost base. The Member States concerned should take immediate action to enforce the application of Article 12(3) of Regulation 550/2004 and that the NSAs concerned provide more detailed information on their oversight activities regarding the compliance of cost eligibility.



En route costs by entity

The Union-wide en route actual costs for 2025 amounted to 7.3B€₂₀₂₂, 89.8%, or 6.6B€₂₀₂₂, of these costs were attributable to the ATSPs/CNSPs. Their actual costs were -1.0% below the determined costs (6.7B€₂₀₂₂).

The costs for the MET providers for the year 2025 amounted to 215M€₂₀₂₂, or 2.9% of the Union-wide en route total actual costs. Actual MET costs were -3.4% below the determined values (222M€₂₀₂₂).

NSAs' 2025 costs were 453M€₂₀₂₂, equivalent to 6.2% of the Union-wide en route total actual costs. Actual NSA costs were -1.3% below the determined values (459M€₂₀₂₂).

Eurocontrol's actual 2025 costs reported by the SES States amounted to 77M€₂₀₂₂, representing 1.1% of the Union-wide en route total actual costs. Eurocontrol's actual costs were -0.8% lower than determined values presented in the performance plans (78M€₂₀₂₂).

En route costs by cost category

Union-wide actual en route staff costs for 2025 amounted to 4,655M€₂₀₂₂, or -0.9% below the determined costs (4,695M€₂₀₂₂). The actual pension costs (which are included in the staff costs) summed to 811M€₂₀₂₂, -4.1% lower than the determined values (845M€₂₀₂₂).

At Member State level, the results show significant variation. When analysing the percentage difference for staff costs, four Member States reported underspending by more than 5% of the determined costs, with Sweden (-15.4%), Portugal (-8.3%), and Malta (-7.8%) being the largest. At the other end of the spectrum, Hungary (+8.7%), Poland (+6.2%), and Denmark (+5.5%) presented the largest overspend.

At the Union-wide level, actual ATCO FTEs were -0.8% lower than planned. At Member State level the results varied significantly ranging from -11.5% for Greece to +6.3% for Lithuania. Austria has not reported the actual FTEs in 2025, thus they have not been included in the computation.

Union-wide actual en route other operating costs for 2025 amounted to 1,625M€₂₀₂₂, or -1.8% below the determined costs (1,655M€₂₀₂₂).

When analysing the percentage difference for other operating costs, 14 Member States reported underspending by more than 5% of the determined costs, with Austria (-19.8%), Belgium-Luxembourg (-17.8%), and Malta (-16.6%) being the largest. At the other end of the spectrum, Slovakia (+32.9%), Slovenia (+11.5%), and Romania (+10.0%) presented the largest overspend.

Union-wide actual en route depreciation costs for 2025 amounted to 730M€₂₀₂₂, or -1.7% below the determined costs (743M€₂₀₂₂).

When analysing the percentage difference for depreciation costs, 15 Member States reported underspending by more than 5% of the determined costs, with Ireland (-20.5%), Croatia (-17.8%), and Austria (-16.7%) being the largest. At the other end of the spectrum, France (+11.7%), Malta (+9.3%), and Estonia (+9.1%) presented the largest overspend.

Union-wide en route actual cost of capital for 2025 amounted to 334M€₂₀₂₂, or -1.7% below the determined costs (340M€₂₀₂₂).

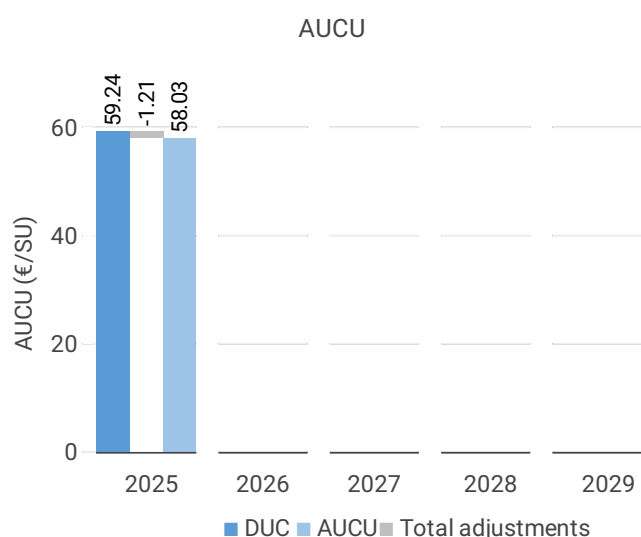


When analysing the percentage difference for cost of capital, 13 Member States reported underspending by more than 5% of the determined costs, with Ireland (-29.8%), Croatia (-17.2%), and Hungary (-16.8%) being the largest. At the other end of the spectrum, Malta (+40.1%), Slovenia (+32.4%), and the Netherlands (+14.5%) presented the largest overspend.

Union-wide en route actual exceptional costs for 2025 amounted to 10M€₂₀₂₂, +10.8M€₂₀₂₂ above the determined costs (-0.7M€₂₀₂₂).

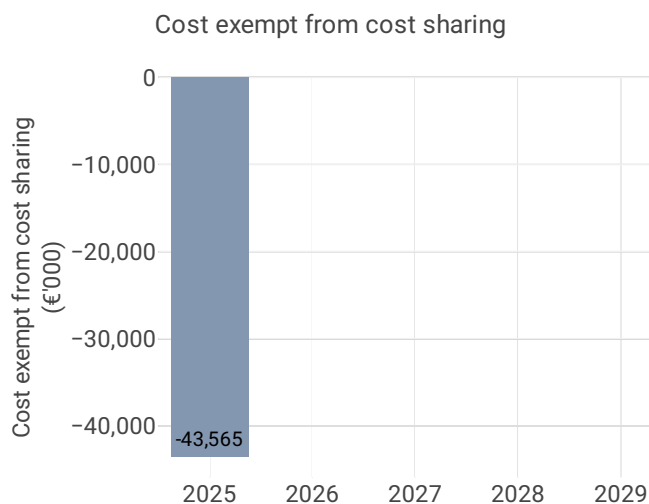
The main contributor to the difference was Germany (+10.3M€₂₀₂₂). The NSA explained that the determined costs for DFS in 2025 included an exceptional item related to depreciation costs that had been charged, but not incurred, during RP2. This reduced the amounts charged to airspace users in 2025, although it is not reflected in the 2025 actual costs.

5.2.2 Actual unit cost incurred by the users (AUCU) (PI#1)



AUCU components (€/SU) – 2025	
Components of the AUCU in 2025	€/SU
DUC	59.24
Inflation adjustment	-0.02
Cost exempt from cost sharing	-0.31
Traffic risk sharing adjustment	-0.17
Traffic adjustment (costs not TRS)	-0.09
Financial incentives	-0.04
Modulation of charges	0.00
Cross-financing	0.00
Other revenues	-0.53
Application of lower unit rate	-0.06
Total adjustments	-1.21
AUCU	58.03
AUCU vs. DUC	-2.1%





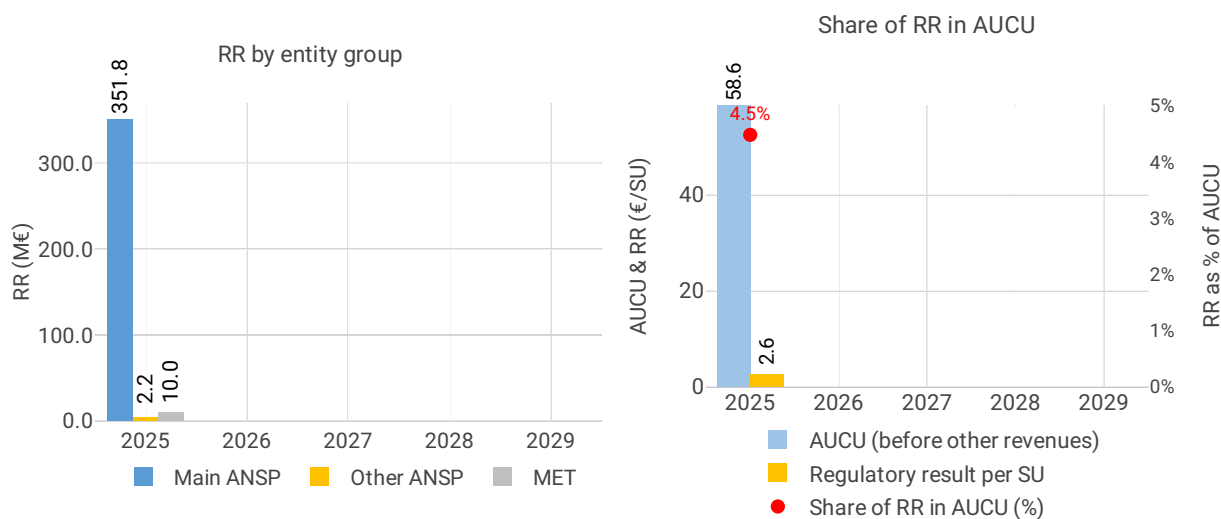
Cost exempt from cost sharing by item - 2025	€'000	€/SU
Changes in law	2,472	0.02
Competent authorities and qualified entities costs	-3,928	-0.03
Eurocontrol costs	-2,761	-0.02
Interest on loans	-1,027	-0.01
New and existing investments	-25,008	-0.18
Pension costs	-13,314	-0.10
Total cost exempt from cost risk sharing	-43,565	-0.31

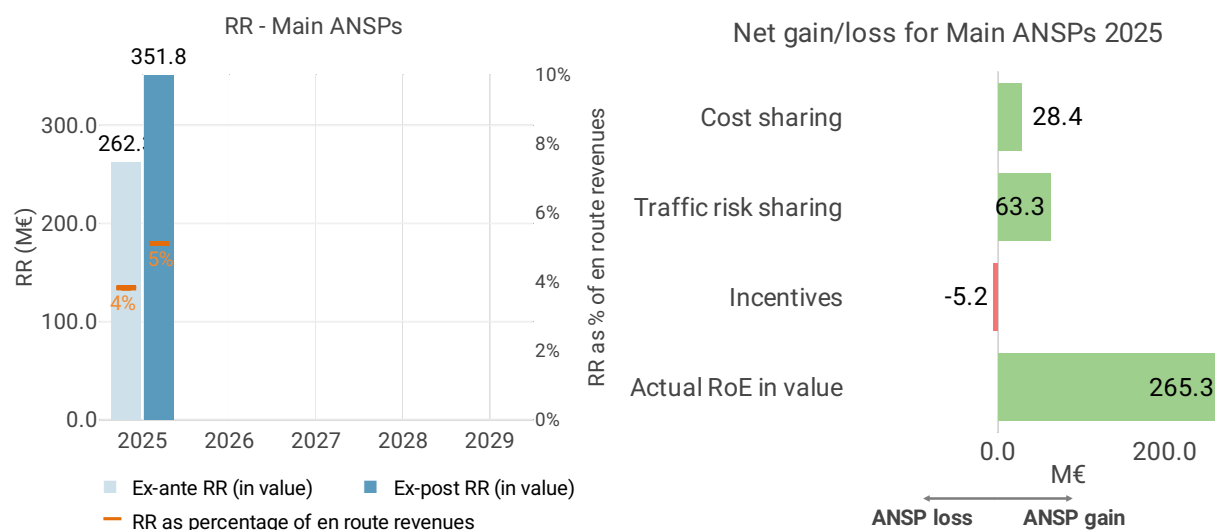
Focus on AUCU

En route actual unit cost for the for the users

The en route actual unit cost incurred by users in 2025 was -2.1% (or -1.21€) lower than the DUC. The main difference stems from other revenues.

5.2.3 Regulatory result (RR)





Focus on regulatory result

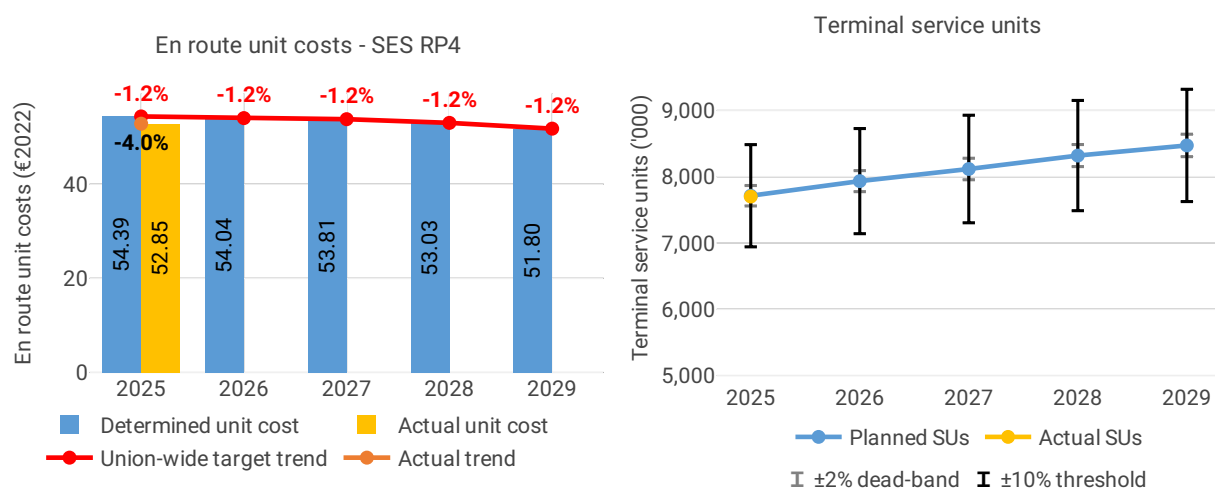
En route regulatory result

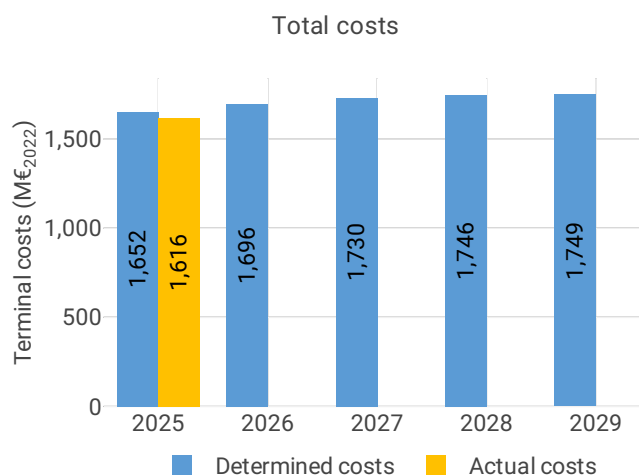
The Union-wide en route regulatory result for 2025 is 364.0M€, representing 4.8% of the total yearly revenues. After the actual value of the return on equity (+271.1M€), the largest net gain in 2025 came from the traffic risk sharing (+63.0M€).

Three of the main ANSPs recorded negative en route regulatory results in 2025: LPS SR (-7.1M€, or -9.5% of the yearly revenues), LVNL (-1.9M€, or -0.8% of the yearly revenues), and NAVIAIR (-0.01M€, or -0.01% of the yearly revenues). The ANSPs with the highest regulatory result in terms of percentage of the yearly revenues are: MATS (+18.5%), Austro Control (+13.3%), and EANS (+10.9%).

When divided by the actual service units, the (unit) regulatory result is directly comparable with the AUCU. The regulatory result per actual en route service unit was equal to 2.62€ in 2025, which means that 4.5% of the true cost of the service was related to the “margin” generated by the ANSPs with respect to their 2025 activities.

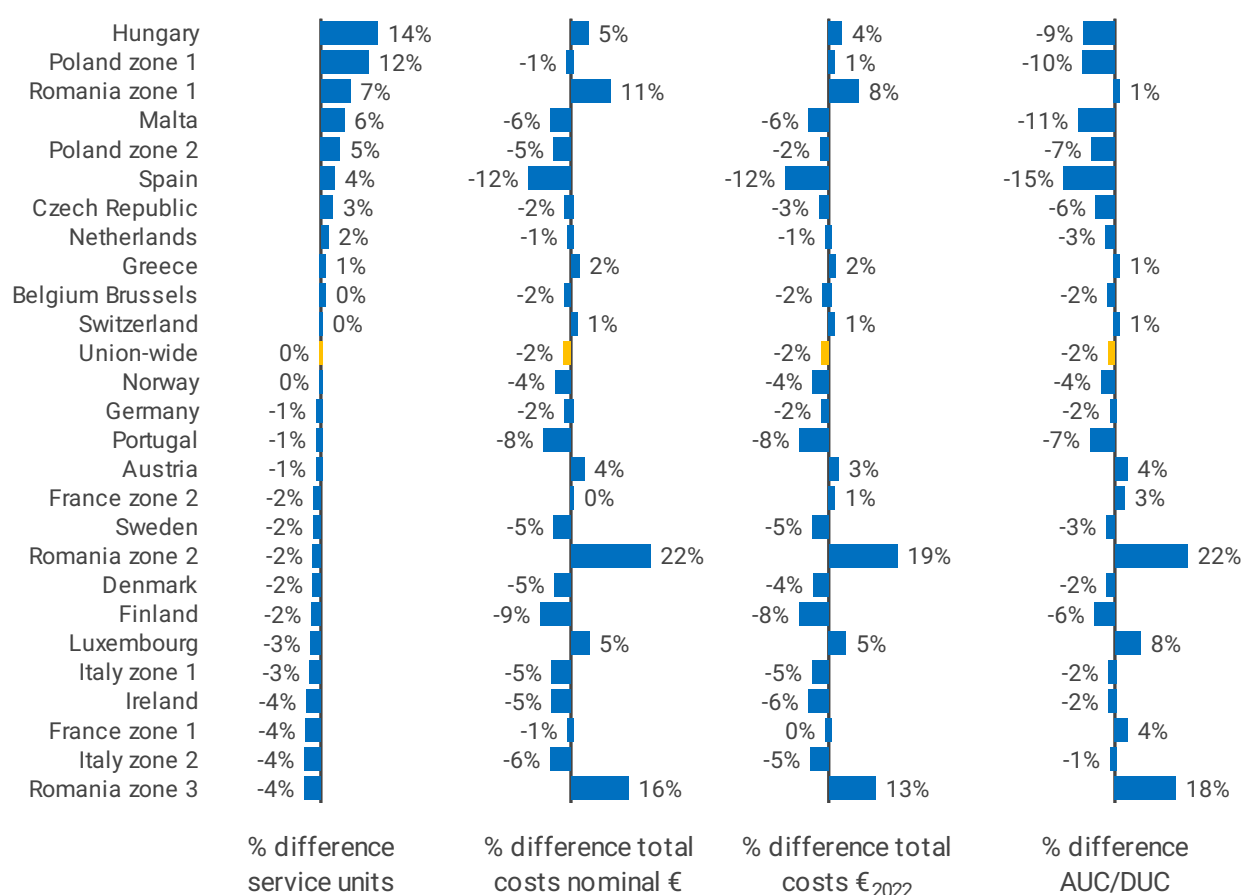
5.3 Terminal charging zone



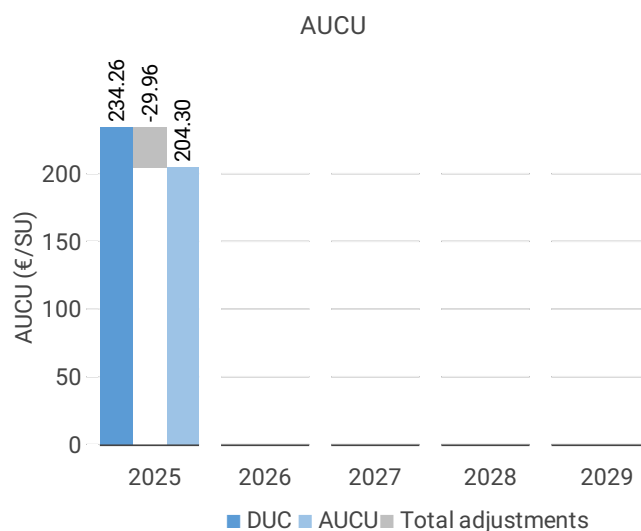


Actual and determined data					
Total costs - nominal (M€)	2025	2026	2027	2028	2029
Determined costs	1,799.8	1,877.7	1,945.9	1,994.3	2,030.0
Actual costs	1,760.7	NA	NA	NA	NA
Difference costs	-39.1	NA	NA	NA	NA

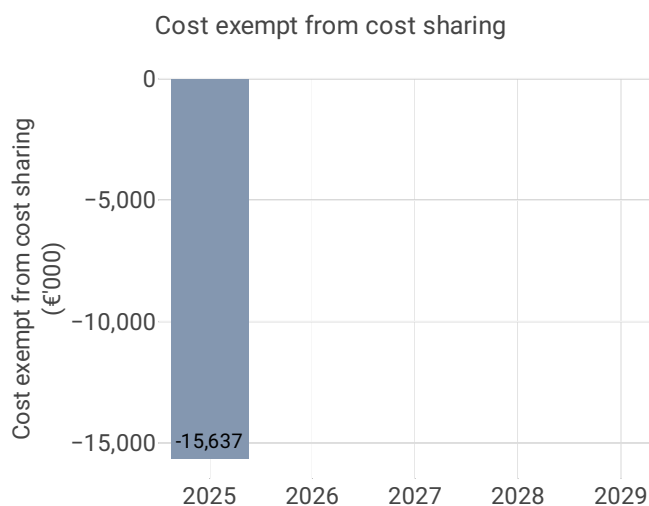
5.3.1 Summary of performance at local level



5.3.2 Actual unit cost incurred by the users (AUCU) (PI#1)



AUCU components (€/SU) – 2025	
Components of the AUCU in 2025	€/SU
DUC	234.26
Inflation adjustment	-0.26
Cost exempt from cost sharing	-2.03
Traffic risk sharing adjustment	-0.51
Traffic adjustment (costs not TRS)	0.12
Financial incentives	-0.25
Modulation of charges	-0.06
Cross-financing	0.00
Other revenues	-18.84
Application of lower unit rate	-8.13
Total adjustments	-29.96
AUCU	204.30
AUCU vs. DUC	-12.8%



Cost exempt from cost sharing by item - 2025	€'000	€/SU
Changes in law	305	0.04
Competent authorities and qualified entities costs	-654	-0.08
Eurocontrol costs	0	0.00
Interest on loans	-238	-0.03
New and existing investments	-14,643	-1.90
Pension costs	-407	-0.05
Total cost exempt from cost risk sharing	-15,637	-2.03

5.3.3 Regulatory result (RR)

