

2025 Annual Monitoring Results



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REMARKS FROM THE CHAIR

This year's PRB Annual Monitoring is the first monitoring publication of the fourth reference period (RP4) covering the results from the year 2025 and reflects the new working arrangements of the Performance Review Board (PRB) that was established together with its Secretariat.

In this context, the PRB has introduced a new format for the Annual Monitoring centred on a digital dashboard, through which stakeholders can consult the data and information provided by the NSAs. This has enabled the PRB to focus its efforts on identifying the most significant trends at both Union and local level, and on formulating targeted recommendations to further improve the performance of ANSPs and the Network Manager.

In this regard, the PRB has also launched a process aimed at fostering a more direct, continuous and constructive dialogue with all key actors involved in the development of the European ATM sector. Reliable and transparent data are essential for the analysis, the PRB will continue to engage with the NSAs to obtain additional information whenever needed.

Overall, performance in 2025 must be assessed against a backdrop of persistent traffic volatility and uncertainty, which has created substantial challenges for the implementation of the performance plans only recently adopted. Rapidly changing traffic flows reduce the reliability of forecasts and make the planning and delivery of service provision more complex. It is essential that ANSPs fully deliver on their commitments by implementing the measures presented and agreed during the planning phase. The PRB and its Secretariat are committed to supporting this objective.

I would like to acknowledge the invaluable contributions of the PRB Secretariat, EASA and EUROCONTROL, whose expertise has been critical to this report. Our mission is now clear: to address today's challenges with determination and to deliver an air traffic management system that is resilient, sustainable and fit for the future.



Koen Milis
PRB Chair

KEY MESSAGE

The 2025 PRB Monitoring marks the first year of the fourth reference period (RP4). In 2025, ANSPs managed 10 million flights, reaching the levels recorded in 2019, with service units being 139 million, well above pre-pandemic levels. As in previous years, this recovery remains uneven, with some regions experiencing rapid growth and others still struggling to return to 2019 traffic levels. **The geopolitical scenarios continue to alter expected traffic flows, reducing the accuracy of forecasts and predictability of the provision of the service.** In this first year of the period, 14 Member States have recorded a difference between actual and forecast (determined) service units greater than 5% (with variation ranging from -17% to +12%). **Member States should consider revising their performance plan if such discrepancies are expected to continue in the coming years** as per Article 18 of Commission Implementing Regulation 2019/317. Against this background, the monitoring results highlight persistent structural issues, from safety management gaps to capacity constraints and delayed implementation of adopted performance plans.

Safety performance in 2025 shows a mixed picture in the effectiveness of safety management, with some challenges that will persist throughout RP4. The occurrence indicators show a decrease compared to 2024; however, the reliability of these data remains doubtful.

- Six ANSPs already achieved the RP4 targets for all safety risk management objectives: Estonia (EANS), Ireland (AirNav), Portugal (NAV Portugal), Slovenia (Slovenia Control), and Spain (EA, ENAIRE).
- 13 ANSPs failed to meet planned intermediate targets for 2025, with Belgium (skeyes), Denmark (NAVIAIR), France (DSNA) and Luxembourg (ANA LUX) recording the lowest maturity level (A - Informal arrangements), below the regulatory requirements. **Member States need to strengthen oversight, ensuring that safety measures are operationally effective and verifiable.**
- **The Network Manager has not reported the effectiveness of safety management within the regulatory timeline, and EASA, as the competent authority, needs to ensure compliance with the provision and analysis of the information.**
- Runway incursions and separation minima infringements decreased in 2025, but discrepancies in occurrence data reporting further limit the ability to draw reliable conclusions. **The occurrence data collection and validation processes need to be improved. Data definition, reliability and alignment across data sets must be coordinated and ensured by EASA.**

Environmental performance in 2025 remained in line with 2024 results, and the target was not achieved. The performance continued to be significantly affected by external disruptions.

- The actual Union-wide horizontal flight efficiency (KEA) was 2.93%, missing the target by 0.13 percentage points. Performance remained in line with 2024, with a

decrease of 0.03 percentage points. 16 Member States did not achieve their local targets.

- Both the planned (KEP) and the shortest available (KES) routes improved in 2025, with the gap between KEP and KES being the smallest ever observed. Airspace users are planning routes that are increasingly closer to the shortest route available.

Capacity performance significantly improved compared to 2024, but en route average ATFM delays remained well above the targets.

- En route ATFM delays averaged 1.64 minutes per flight, which was 0.74 minutes worse than the Union-wide target. At the same time, average delays showed a significant reduction compared to the 2.19 minutes per flight in 2024, with most of the improvements coming from a reduction of weather delays. As in 2024, the main causes of delay were ATC capacity, weather, and ATC staffing.
- Austria, Croatia, Denmark, FABEC (France and Germany), Greece, and Spain did not meet their local en route capacity targets. France was responsible for the highest average delay within the network.
- The Union-wide number of ATCOs in operation is broadly as planned, although the number of ATCOs in training is already 7% below plans. This presents challenges for the next years.
- Terminal ATFM delays averaged 0.97 minutes per flight. Compared to 2024, there has been an increase of 0.03 minutes per flight.
- **Member States must continue exploring and implementing solutions to ensure that the remaining capacity shortfalls are addressed and that the already delivered improvements are maintained over the coming years.**
- **Member States should ensure a balance between the implementation of quick short-term wins, optimisation of resources, and structural capacity measures to ensure the development of sufficient capacity in both the short and longer term.**

Cost-efficiency performance was, as for earlier years, characterised by under-implementation of performance plans rather than efficiency gains.

- Union-wide en route actual costs were 1% lower than planned, with significant variations at local level (ranging from -9% to +6%). Service units exceeded the determined by 1.8%, also with significant variations at local level (ranging from -17% to +12%). The resulting Union-wide en route actual unit cost was 2.8% lower than the determined unit cost.
- At Union-wide level, Member States underspent -3% in costs related to en route and terminal investments, with variations from -19% to +16%. The Member States with the largest underinvestment in their ANSPs were Ireland (-19%), Finland (-15%) and Austria (-14%). **The information related to CP1 and ATM master plan investments either has not been reported consistently or at all by many Member States. An improvement in the reporting is necessary for a transparent monitoring of the implementation.**

- **Traffic variations at local level between actual and forecast were significant and are likely to be increasingly problematic in the remaining years of RP4.**
- **At Union-wide level, the unit cost decreased by -4.0%, with a target of -1.2%. This raises the question of whether the adopted targets were sufficiently ambitious given that this is the first year of the reference period.**

LOCAL RECOMMENDATIONS

Member State	KPA	PRB conclusions and recommendations
Austria	GEN	Austria is required to improve the monitoring process by providing all the required information and to provide proper analysis and justifications related to the annual results.
	CEF	- The en route regulatory result of Austro Control amounted to 13% of the 2025 regulatory revenue. Austria should ensure that any abnormal regulatory result is either reinvested to improve the quality of services delivered to airspace users or reimbursed to them. - Austro Control actual investment costs were -14% below the planned level. Austria must take action to implement the relevant RP4 investment plan and ensure that any underspending is reimbursed to airspace users.

Member State	KPA	PRB conclusions and recommendations
Belgium	SAF	Skeyes reported the lowest maturity level (A - Informal arrangements), below the regulatory requirements. Belgium must address the low performance through appropriate mitigating actions in the State Safety Plan and by establishing a clear improvement plan to ensure that the targets are achieved by the end of the reference period.
	CEF	- The en route regulatory result of skeyes amounted to 10% of the 2025 regulatory revenue. Belgium should ensure that any abnormal regulatory result is either reinvested to improve the quality of services delivered to airspace users or reimbursed to them. - The additional costs invoked to justify a deviation for capacity has not been fully materialised (-10%). Belgium must ensure that the money is invested in the coming years, differently the unspent amounts should be reimbursed to airspace users.

Member State	KPA	PRB conclusions and recommendations
Bulgaria	ENV	Bulgaria should commit to the implementation of all the operational measures set out in the ERNIP to support the achievement of its environment performance targets, as requested in the Commission Decision (EU) 2025/1054. Bulgaria did not report on the implementation of these measures in the Monitoring Report and must do so in the future.
	CEF	The en route regulatory result of BULATSA amounted to 10% of the 2025 regulatory revenue. Bulgaria should ensure that any abnormal regulatory result is either reinvested to improve the quality of services delivered to airspace users or reimbursed to them.

Member State	KPA	PRB conclusions and recommendations
Croatia	CAP	Croatia started closing the existing capacity gap. However, both the number of ATCOs and the number of ATCO trainees are below planned values. Furthermore, more than half the delays are due to weather impact. To further reduce delays, Croatia must expedite the recruitment and training of controllers and work closely with the Network Manager to mitigate the impact of adverse weather.
	CEF	Croatia Control actual investment costs were -14% below the planned level. Croatia must take action to implement the relevant RP4 investment plan and ensure that any underspending is reimbursed to airspace users.

Member State	KPA	PRB conclusions and recommendations
Cyprus	GEN	Cyprus should provide detailed information on the corporatisation of the ANSP.
	SAF	CYATS failed to meet planned intermediate targets for 2025. Cyprus must ensure that implementation efforts on Safety Management are accelerated to ensure that the targets are met by the end of the reference period.
	CEF	The en route regulatory result of DCAC Cyprus amounted to 10% of the 2025 regulatory revenue. Cyprus should ensure that any abnormal regulatory result is either reinvested to improve the quality of services delivered to airspace users or reimbursed to them.

Member State	KPA	PRB conclusions and recommendations
Czech Republic	CAP	Czech Republic should develop, under the initiative of the Network Manager, capacity scenarios to prepare for the reopening of airspace currently closed to civil air traffic due to Russia's war of aggression against Ukraine, and the potential rearrangement of traffic flows.

Member State	KPA	PRB conclusions and recommendations
Denmark	SAF	NAVIAIR reported the lowest maturity level (A - Informal arrangements), below the regulatory requirements. Denmark must address the low performance through appropriate mitigating actions in the State Safety Plan and by establishing a clear improvement plan to ensure that the targets are achieved by the end of the reference period.
	CAP	- Denmark has already defined remedial measures to address the performance shortfall in terminal capacity. Denmark should implement these measures as identified and planned. - Denmark should develop, under the initiative of the Network Manager, capacity scenarios to prepare for the reopening of airspace currently closed to civil air traffic due to Russia's war of aggression against Ukraine, and the potential rearrangement of traffic flows.

Member State	KPA	PRB conclusions and recommendations
Estonia	CAP	Estonia should develop, under the initiative of the Network Manager, capacity scenarios to prepare for the reopening of airspace currently closed to civil air traffic due to Russia's war of aggression against Ukraine, and the potential rearrangement of traffic flows.
	CEF	The en route regulatory result of EANS amounted to 11% of the 2025 regulatory revenue. Estonia should ensure that any abnormal regulatory result is either reinvested to improve the quality of services delivered to airspace users or reimbursed to them.

Member State	KPA	PRB conclusions and recommendations
Finland	CAP	Finland should develop, under the initiative of the Network Manager, capacity scenarios to prepare for the reopening of airspace currently closed to civil air traffic due to Russia's war of aggression against Ukraine, and the potential rearrangement of traffic flows.
	CEF	Fintraffic ANS actual investment costs were -15% below the planned level. Finland must take action to implement the relevant RP4 investment plan and ensure that any underspending is reimbursed to airspace users.

Member State	KPA	PRB conclusions and recommendations
France	SAF	DSNA reported the lowest maturity level (A - Informal arrangements), below the regulatory requirements. France must address the low performance through appropriate mitigating actions in the State Safety Plan and by establishing a clear improvement plan to ensure that the targets are achieved by the end of the reference period.
	CAP	- After an improvement in 2024, France's capacity gap increased again in 2025: average en route ATFM delays went from 1.39 min/flight in 2024 to 1.89 min/flight in 2025. France should aim to improve the planning and allocation of ATCO resources, maintain pressure on ATCO recruitment and training, and work with the Network Manager to mitigate the impact of adverse weather. - France needs to materialise the anticipated capacity benefits in terms of controller productivity from its 4 Flight ATS system upgrades.

Member State	KPA	PRB conclusions and recommendations
Germany	CAP	Germany made noteworthy steps towards closing the existing capacity gap. Measures to further close the gap have been identified in the performance plan and are being implemented. Germany should ensure that the implementation of identified capacity measures continues as planned and work with the Network Manager to mitigate the impact of adverse weather.
	CEF	- DFS actual investment costs were -11% below the planned level. Germany must ensure that any underspending is reimbursed to airspace users. - The additional costs invoked to justify a deviation for capacity has not been fully materialised (-28%). Germany must ensure that the money is invested in the coming years, differently the unspent amounts should be reimbursed to airspace users.

Member State	KPA	PRB conclusions and recommendations
Greece	GEN	Greece should proceed in the implementation of the Action plan as agreed with the European Commission. Specifically, Greece should prioritise the implementation of the new ATS system and ATCO productivity tools to close the current capacity gap.

Member State	KPA	PRB conclusions and recommendations
Hungary	CAP	Hungary should develop, under the initiative of the Network Manager, capacity scenarios to prepare for the reopening of airspace currently closed to civil air traffic due to Russia's war of aggression against Ukraine, and the potential rearrangement of traffic flows.
	CEF	- HungaroControl actual investment costs were -12% below the planned level. Hungary must ensure that any underspending is reimbursed to airspace users. - The additional costs invoked to justify a deviation for capacity has not been fully materialised (-12%). Hungary must ensure that the money is invested in the coming years, differently the unspent amounts should be reimbursed to airspace users.

Member State	KPA	PRB conclusions and recommendations
Ireland	CEF	- AirNav Ireland actual investment costs were -19% below the planned level. Ireland must ensure that any underspending is reimbursed to airspace users. - The additional costs invoked to justify a deviation for capacity has not been fully materialised (-42%). Ireland must ensure that the money is invested in the coming years, differently the unspent amounts should be reimbursed to airspace users.

Member State	KPA	PRB conclusions and recommendations
Italy	GEN	Italy is required to improve the monitoring process by providing all the required information.
	CEF	The en route regulatory result of ENAV amounted to 11% of the 2025 regulatory revenue. Italy should ensure that any abnormal regulatory result is either reinvested to improve the quality of services delivered to airspace users or reimbursed to them.

Member State	KPA	PRB conclusions and recommendations
Latvia	CAP	Latvia should develop, under the initiative of the Network Manager, capacity scenarios to prepare for the reopening of airspace currently closed to civil air traffic due to Russia's war of aggression against Ukraine, and the potential rearrangement of traffic flows.
	CEF	The en route regulatory result of LGS amounted to 10% of the 2025 regulatory revenue. Latvia should ensure that any abnormal regulatory result is either reinvested to improve the quality of services delivered to airspace users or reimbursed to them.

Member State	KPA	PRB conclusions and recommendations
Lithuania	CAP	Lithuania should develop, under the initiative of the Network Manager, capacity scenarios to prepare for the reopening of airspace currently closed to civil air traffic due to Russia's war of aggression against Ukraine, and the potential rearrangement of traffic flows.
	CEF	- Oro Navigacija actual investment costs were -11% below the planned level. Lithuania must take action to implement the relevant RP4 investment plan and ensure that any underspending is reimbursed to airspace users. - The en route regulatory result of Oro Navigacija amounted to 10% of the 2025 regulatory revenue. Lithuania should ensure that any abnormal regulatory result is either reinvested to improve the quality of services delivered to airspace users or reimbursed to them.

Member State	KPA	PRB conclusions and recommendations
Luxembourg	SAF	ANA LUX reported the lowest maturity level (A - Informal arrangements), below the regulatory requirements. Luxembourg must address the low performance through appropriate mitigating actions in the State Safety Plan and by establishing a clear improvement plan to ensure that the targets are achieved by the end of the reference period.

Member State	KPA	PRB conclusions and recommendations
Malta	GEN	Malta is required to improve the monitoring process by providing all the required information.
	CEF	The en route regulatory result of MATS amounted to 19% of the 2025 regulatory revenue. Malta should ensure that any abnormal regulatory result is either reinvested to improve the quality of services delivered to airspace users or reimbursed to them.

Member State	KPA	PRB conclusions and recommendations
The Netherlands	GEN	No specific recommendation for capacity and cost-efficiency pending the adoption of the performance plan.
	SAF	LVNL failed to meet planned intermediate targets for 2025. The Netherlands must ensure that implementation efforts on Safety Management are accelerated to ensure that the targets are met by the end of the reference period.

Member State	KPA	PRB conclusions and recommendations
Norway	SAF	Avinor failed to meet planned intermediate targets for 2025. Norway must ensure that implementation efforts on Safety Management are accelerated to ensure that the targets are met by the end of the reference period.
	CAP	Norway should develop, under the initiative of the Network Manager, capacity scenarios to prepare for the reopening of airspace currently closed to civil air traffic due to Russia's war of aggression against Ukraine, and the potential rearrangement of traffic flows.

Member State	KPA	PRB conclusions and recommendations
Poland	CAP	Poland should develop, under the initiative of the Network Manager, capacity scenarios to prepare for the reopening of airspace currently closed to civil air traffic due to Russia's war of aggression against Ukraine, and the potential rearrangement of traffic flows.

Member State	KPA	PRB conclusions and recommendations
Portugal	GEN	No specific recommendation for 2025.

Member State	KPA	PRB conclusions and recommendations
Romania	SAF	ROMATSA failed to meet planned intermediate targets for 2025. Romania must ensure that implementation efforts on Safety Management are accelerated to ensure that the targets are met by the end of the reference period.
	CAP	Romania should develop, under the initiative of the Network Manager, capacity scenarios to prepare for the reopening of airspace currently closed to civil air traffic due to Russia's war of aggression against Ukraine, and the potential rearrangement of traffic flows.

Member State	KPA	PRB conclusions and recommendations
Slovakia	GEN	No specific recommendation pending the adoption of the performance plan.

Member State	KPA	PRB conclusions and recommendations
Slovenia	GEN	No specific recommendation for 2025.

Member State	KPA	PRB conclusions and recommendations
Spain	SAF	Skyways failed to meet planned EoSM intermediate targets for 2025. Spain must ensure that implementation efforts on Safety Management are accelerated to ensure that the targets are met by the end of the reference period.
	ENV	Spain needs to accelerate in fulfilling its commitment of implementing enhanced FRA.
	CAP	Spain made limited progress in closing the existing capacity gap, largely due to a strong increase in traffic. With particular focus on Barcelona and Sevilla ACCs, Spain must continue to implement identified capacity measures and identify additional measures if necessary and take steps to ensure the implementation occurs in a timely fashion and delivers the expected benefits – both in terms of capacity performance and in terms of mitigating the negative impact of capacity shortages on environmental performance. Additionally, Spain should continue working with the Network Manager to mitigate the impact of adverse weather.

Member State	KPA	PRB conclusions and recommendations
Sweden	SAF	LFV, ACR, SDATS and AFAB failed to meet planned intermediate targets for 2025. Sweden must ensure that implementation efforts on Safety Management are accelerated to ensure that the targets are met by the end of the reference period.
	CAP	Sweden should develop, under the initiative of the Network Manager, capacity scenarios to prepare for the reopening of airspace currently closed to civil air traffic due to Russia's war of aggression against Ukraine, and the potential rearrangement of traffic flows.

Member State	KPA	PRB conclusions and recommendations
Switzerland	GEN	No specific recommendation pending the adoption of the performance plan.