PERFORMANCE REVIEW BOARD
of the Single European Sky

Performance Review Board

Monitoring Report

SES RP3 - RP3

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1 OVERVIEW

1.1 Contextual information

No of ACCs 49

No of airports in the scope of the performance plan:

- **≥80’K** 42
- **<80’K** 103

Share en route / terminal costs 2024 83% / 17%

En route charging zone(s) 29

Terminal charging zone(s) 26

No of main ANSPs 29

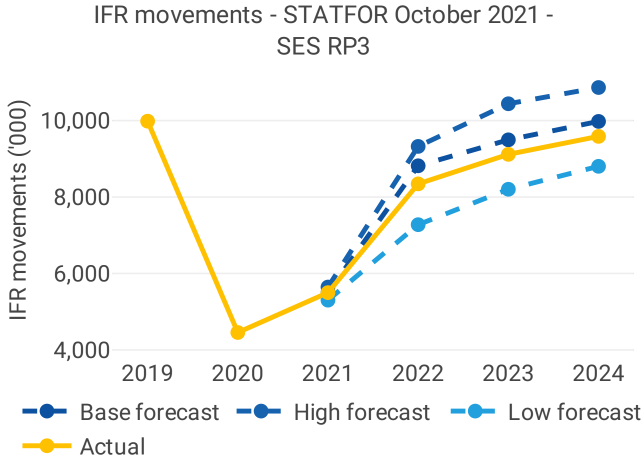
No of other ANSPs 14

No of MET Providers 26

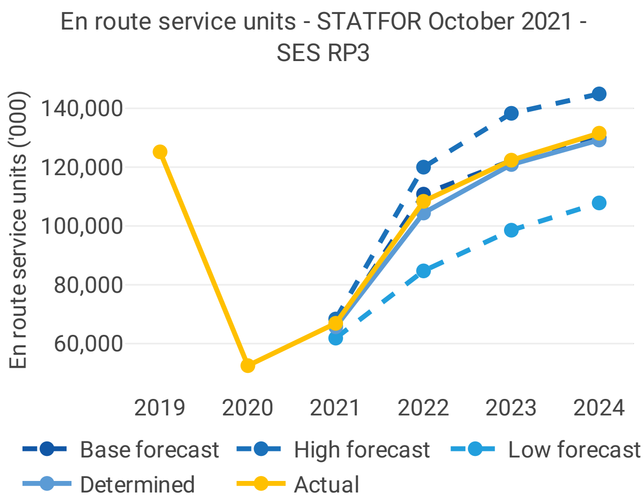
1.2 Main PRB findings - rp3

- In the early years of RP3, air traffic was severely impacted by the COVID-19 pandemic, with IFR movements dropping by up to 60% compared to pre-pandemic levels. Since 2021, traffic has been gradually recovering despite ongoing uncertainty. Recovery has been uneven across regions, particularly due to the repercussions of Russia’s war of aggression against Ukraine.
- The number of ANSPs meeting the RP3 targets for the effectiveness of safety management remained stable throughout the first four years of the reference period and resulting in 27 out of 36 ANSPs achieving the target by the end of the period.
- Performance in the environmental KPA was significantly influenced by external factors. Initially, the sharp decline in traffic led to improvements in horizontal flight efficiency. However, as demand returned, the indicator began to deteriorate. From 2022 onwards, the war in Ukraine further disrupted performance, causing airspace closures, rerouting, and shifts in traffic flows.
- Traffic fluctuations during RP3 also had a notable impact on capacity performance. Targets were met in 2020 and 2021 due to reduced traffic levels. However, ATFM delay per flight has increased each year since 2020, indicating that ANSPs have not been able to match capacity with the recovering demand. This mismatch has affected flight punctuality—especially during peak summer months—and flight efficiency, as aircraft were rerouted around congested areas, resulting in longer flight paths.
- Throughout RP3, the Union-wide targets for en-route cost-efficiency were achieved in each year of the period. The cost-efficiency trend has been heavily influenced by the COVID-19 pandemic related restrictions in the first two years of the reference period, and by the subsequent traffic recovery. Actual total costs were, at aggregate level, lower than planned by -1.0B€2017 (-3.2%) over the whole period. Lower actual costs can be in part attributed to the significant increase in inflation that characterised all Member States in the second half of the reference period, resulting in higher discount rates for actual costs as compared to the planned level. However, the lower actual costs also reflect shortcomings in the implementation of performance plans—particularly in ATCO recruitment and investment execution. This lack of ambition has adversely affected operational performance, resulting in suboptimal service delivery to airspace users.

1.3 Traffic (SES RP3 area)



- Actual IFR movements at Union-wide level fell on average by -0.8% per year between 2019 and 2024
- Based on STATFOR October 2021 base forecast, IFR movements at Union-wide level were expected to remain stable over the same period.
- Over RP3, IFR movements at Union-wide level remained below the 2019 pre-pandemic level.
- IFR movements grew faster in the first half of the reference period (+23% in 2021 and +52% in 2022) as post-COVID 19 rebounds, while such growth slowed down in 2023 (+9.3%), and 2024 (+5.2%).
- The actual traffic confirms that the STATFOR October 2021 base forecast was accurate: At Union-wide level, the actual flights have been close to the base forecast in 2022, 2023 and 2024, although at slightly lower levels.



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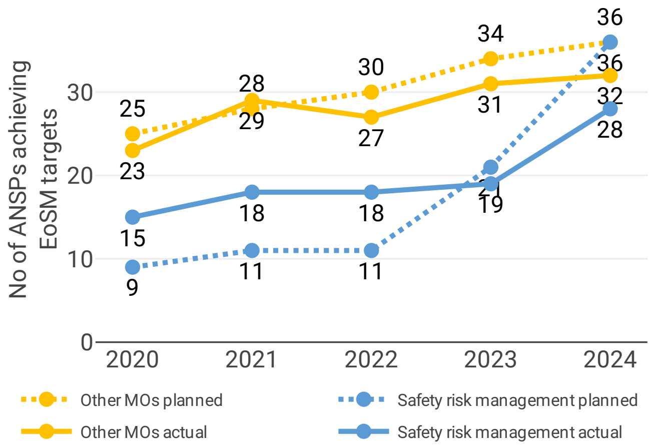
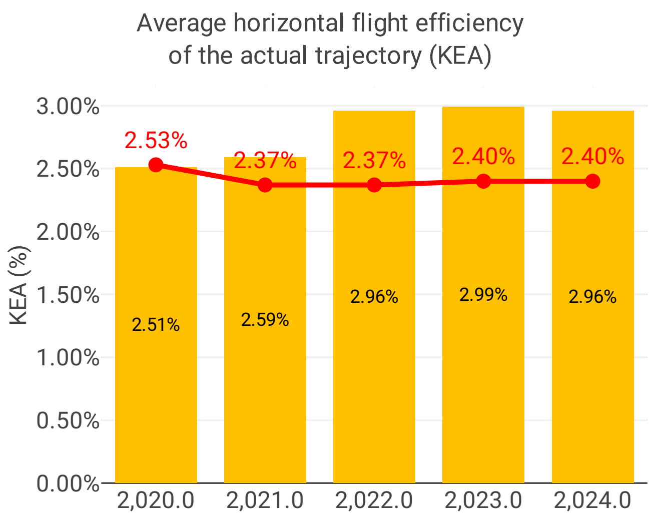
1.4 Safety (SES RP3 area)



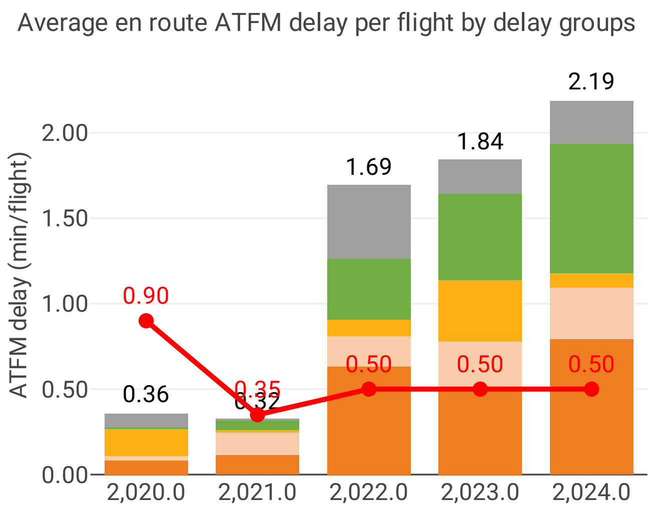
- The number of ANSPs achieving the RP3 target for the effectiveness of safety management remained stable throughout the first four years of RP3, increasing marginally from 16 ANSPs in 2020 to 27 in 2024.

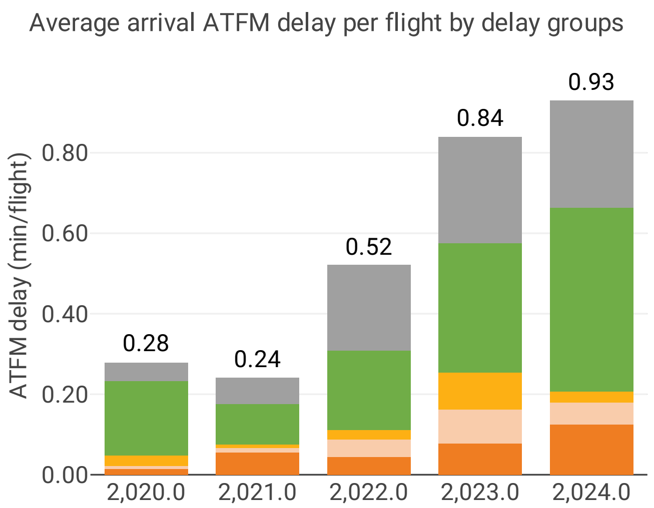
1.5 Environment (SES RP3 area)



- Performance in the environment KPA was heavily influenced by external factors during RP3. The traffic downturn in 2020 led improvements in horizontal flight efficiency (KEA) in 2020. As traffic de-mand returned, KEA moved back towards previous performance until early 2022, when Russia's war of aggression against the Ukraine led to airspace closures and avoidance and shifted traffic flows. This had a major impact on KEA at both Union-wide level and for those Member States in the vicinity.

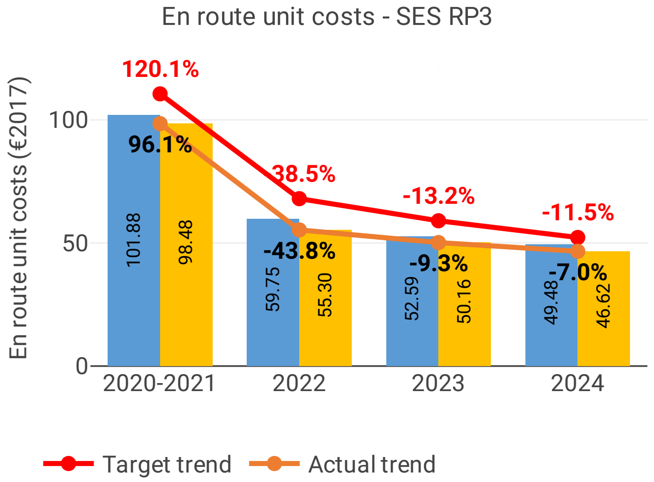
1.6 Capacity (SES RP3 area)

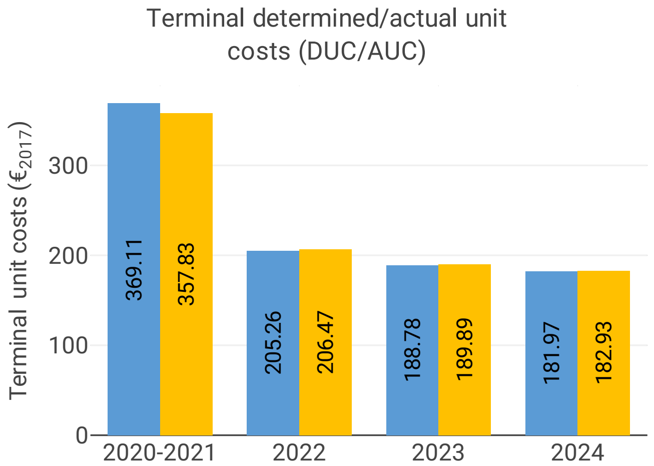




- The fluctuations in traffic during RP3 also had a significant impact on capacity performance. Targets were achieved in 2020 and 2021 with lower traffic. However, en route ATFM delay per flight has increased each year since 2020 demonstrating that ANSPs have not been able to match capacity to demand as traffic has recovered. This has affected both the punctuality of flights, particularly during the busy summer months, and flight efficiency as flights routed around congested areas and in-creased flight lengths.

1.7 Cost-efficiency (SES RP3 area)





- During RP3, the en route cost-efficiency Union-wide targets have been achieved in each year of the reference period. The cost-efficiency trend has been heavily influenced by the COVID-19 pandemic related restrictions in the first two years of the reference period, and by the subsequent traffic recov-ery. Between 2019 (last year of RP2) and 2024, the Union-wide actual unit cost decreased by -5.6%, on an average -1.1% per year (from 49.37€2017 to 46.62€2017), suggesting modest improvement in the cost-efficiency area during RP3.
- Actual total costs have been lower than planned by -1.0B€2017 (or by -3.2%) over the whole reference period. Lower actual costs can be in part attributed to the significant increase in inflation that charac-terised all Member States in the second half of the reference period, resulting in higher discount rates for actual costs than for planned costs. However, the lower actual costs also signal a deficiency in the implementation of the performance plans, especially regarding ATCO recruitment and the realisation of the investment plans. This lack of ambition has significantly impacted operational performance in RP3, resulting in suboptimal service delivery to users.