Network Operations Report 2025

Annex I - Airspace Users

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1 Network Performance

In terms of network capacity performance, especially during the summer months, 2025 was a much-welcomed relief compared to the previous year's unprecedented high enroute ATFM delays. Marseille and Karlsruhe were the top delay generators followed by Reims, Barcelona, and Brest. ATC capacity issues often resulting from ATC staffing issues were the main ATFM delay reasons. Traffic was up significantly in Vienna, Sarajevo, Budapest, Skopje, and Zagreb ACCs. Once again special ATFM measures during the summer were needed to cope with continuing structural ATC issues primarily in France and Germany. Close to the start of the summer season, capacity planning for Marseille airspace had to be adjusted downward on request of DSNA.

According to tradition, ATFM events were handled well by NM in coordination with the different operational stakeholders. Late notices for military events caused flight planning issues at times and should be avoided.

By capitalizing on the ATFM cross-border weather management procedure, the Capacity and Weather Based Ops (CWBO) procedure was introduced which made an important contribution to improved predictability and stability in the network. Temporary RAD relaxations and ATFM scenarios successfully shifted traffic away from capacity hotspots in a more organized manner. Further enhancement of the pre-tactical process (well into the night before the ops day) involving continuous spreading of traffic flows within 24 hours from the tactical phase remains needed.

The rolling network operations plan and the weekly coordination cell calls at director's level (Enlarged NDOP) had a positive impact on awareness and actions performed in support of airspace capacity.

On the flight efficiency side, some ANSPs (DFS, MUAC, NATS, DSNA) maintained consistent communication with AUs to identify operational efficiencies. Flight planning issues appeared to increase because of level cap RADs and free route airspace implementations in some areas of the network, causing non-optimal routes to onload ATC sectors where the flights in question should not be. Also, some RADs were created to address traffic flow changes due to an ATC charge increase in Belgian airspace.

At different times and different airports, drone incursions/sightings hindered civil air traffic resulting in flight diversions and cancellations.

Southwest Axis

Most capacity problems were experienced on this axis, primarily in French airspace. Structurally inadequate ATC sector openings in Marseille are a guaranteed recipe for failure. Higher ATFM delays on weekends and during/around school vacation times are not getting resolved. 4-FLIGHT implementation dragged on and related ATFM delays were recorded month after month, while once completed the benefits in terms of capacity gains are not known. In Spanish airspace, Barcelona struggled, but Seville performed much better compared to summer 2024. The Canaries improved over the

winter. Morocco saw increased delays. Good capacity performance by MUAC and the Swiss ACCs.

Northeast Axis

Mostly good ATFM delay performers on this axis.

Southeast Axis

A remarkable recovery from 2024 was noted along this axis. Especially Budapest with an improved ATFM approach, and also Zagreb did a very good job. Both dealt with high traffic numbers and were able to bring back ATFM delays by around 80%. Good performance as well by Vienna, Belgrade, and Makedonia. Italy was very important in handling extra traffic resulting from CWBO and ATFM regulations in neighboring ACCs. Despite special summer measures targeted at offloading Karlsruhe airspace, and despite an important ATFM delay improvement, Karlsruhe remains one of two top delay generators. The axis/network remained resilient in handling the traffic flow changes from the war in Ukraine and from military conflict in the Middle East. The good performance by Türkiye and Cyprus was observed in that respect. Israel managed to minimize the impact from the Middle East situation.

2 Conclusion

Increased stability in the network provided for an overall much better capacity performance compared to 2024. It was good to experience an improved management of the network by NM in times of significant disruption. This included the introduction of CWBO. AUs expect such management and welcome further related initiatives.

A summer ATFM mitigation plan again proved to be a necessary evil. These plans appear to grow. The addition of more and more static summer RAD measures must be avoided as these limit the available route options at all times. Those capturing limited numbers of flights should be used more dynamically following pre-tactical assessment. AUs do not want these plans to become standard operating procedure. Instead, first and foremost the structural ATC issues must get resolved. Along with existing in-depth post ops analyses of the true ATFM delay reasons, this requires reliable post ops data reflecting the same. As such, corrective short/medium/long-term action through procedures, technology, and/or investment can be applied.

While 2025 network capacity performance felt more comfortable, it cannot divert attention from the capacity needs in the coming years. With traffic, under normal circumstances, expected to continue to grow year after year, airspace design and re-sectorization will have to evolve and with that the ATC staffing situation including rostering and recruitment planning. Ongoing work shows that at present nearly one third of the ACCs in the network do not have sufficient ATCO recruitment plans until 2030. Knowing the time it takes to go through such recruitment, this work must be accelerated.

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