Introduction to the European ATM Master Plan 2024

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TO REDUCE OUR CLIMATE IMPACT THE TIME TO ACT IS NOW

Making Europe the most efficient and environmentally friendly sky to fly in the world

TODAY

~ €40 bn total investment to implement the Digital European Sky

DESTINATION 2050 ESTIMATES*

€441 bn* To deliver alternative fuels

€820 bn* $1.7 trillion value chain† to deliver electric and hydrogen aircraft

2040+

* Source: Destination 2050: The Price of Net Zero Report
† Source: World Economic Forum: Target True Zero: Delivering the Infrastructure for Battery and Hydrogen-Powered Flight

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Equates to <€1,5 per passenger per flight (2020-2040)

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GOALS CAN ONLY BE ACHIEVED WITH AN EVEN STRONGER FOCUS ON DIGITAL TRANSFORMATION

2024

5 KEY TRANSFORMATION LEVERS

1. Trajectory optimisation
2. Data volumes
3. Automation
4. Dynamic airspace
5. Air traffic controller roles

2040+

THE FUTURE OF AIR MOBILITY

New entrants
Autonomous aircraft
Alternative fuels
Electric & hydrogen aircraft

Making Europe the most efficient and environmentally friendly sky to fly in the world
A common roadmap to drive investment and shape future regulation with a strong emphasis on speed

We have to shorten the innovation cycle:

1. Complete transition to a modern system architecture
2. Economic regulatory framework to encourage investments on deployment priorities in future RPs
3. Technical regulatory framework to facilitate implementation by early movers

Master Plan Phases A-C
Implementation completed
26%
R&I completed and ongoing
83%

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INCORPORATING COLLECTIVE ACTION ON SECURITY ASPECTS, ENABLING DUAL USE OF TECHNOLOGIES

Making Europe the most efficient and environmentally friendly sky to fly in the world

- Integrated future combat systems
- Cybersecurity posture
- Protected critical infrastructure

Less available airspace due to the Ukraine war

20%

Increase in cyber incidents from 2020 to 2021

+70%

Security and defence
New threats demand deeper collaboration
NOW – JULY ‘24

Phase 1
• Explore full range of options

Phase 2
• Prioritisation
• Impact analysis
• Input to RP4

Phase 3
• Final consolidation

Phase 4
• Formal consultation
• Adoption of new Master Plan

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The pioneering spirit is less about thinking up new ideas, as ridding ourselves of dogmas and habits that hold us captive in thinking.

Bertrand Piccard