

Introduction to the European ATM Master Plan 2024

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TO REDUCE OUR CLIMATE IMPACT THE TIME TO ACT IS NOW

2040+

TODAY

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

€441 bn*
To deliver alternative fuels

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

DESTINATION 2050 ESTIMATES*

ZERO EMISSION AVIATION

* 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

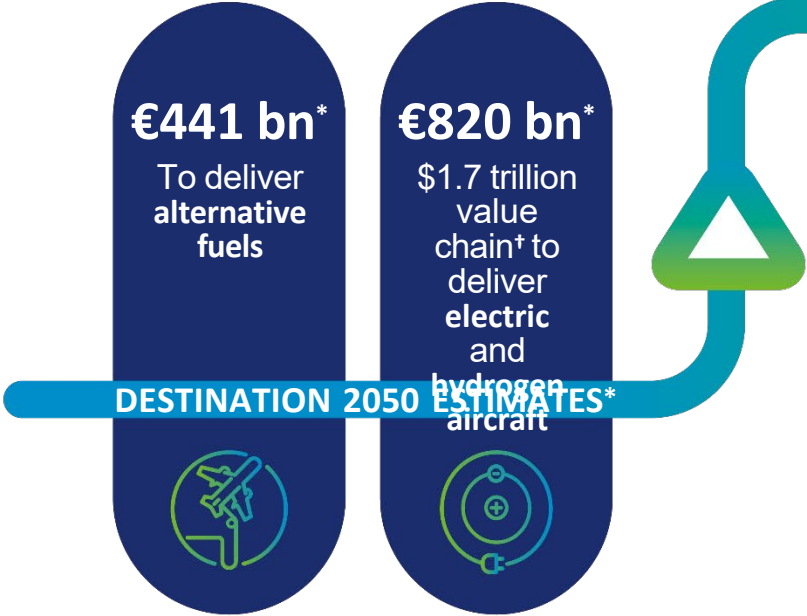
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Equates to <€1,5 per passenger per flight (2020-2040)

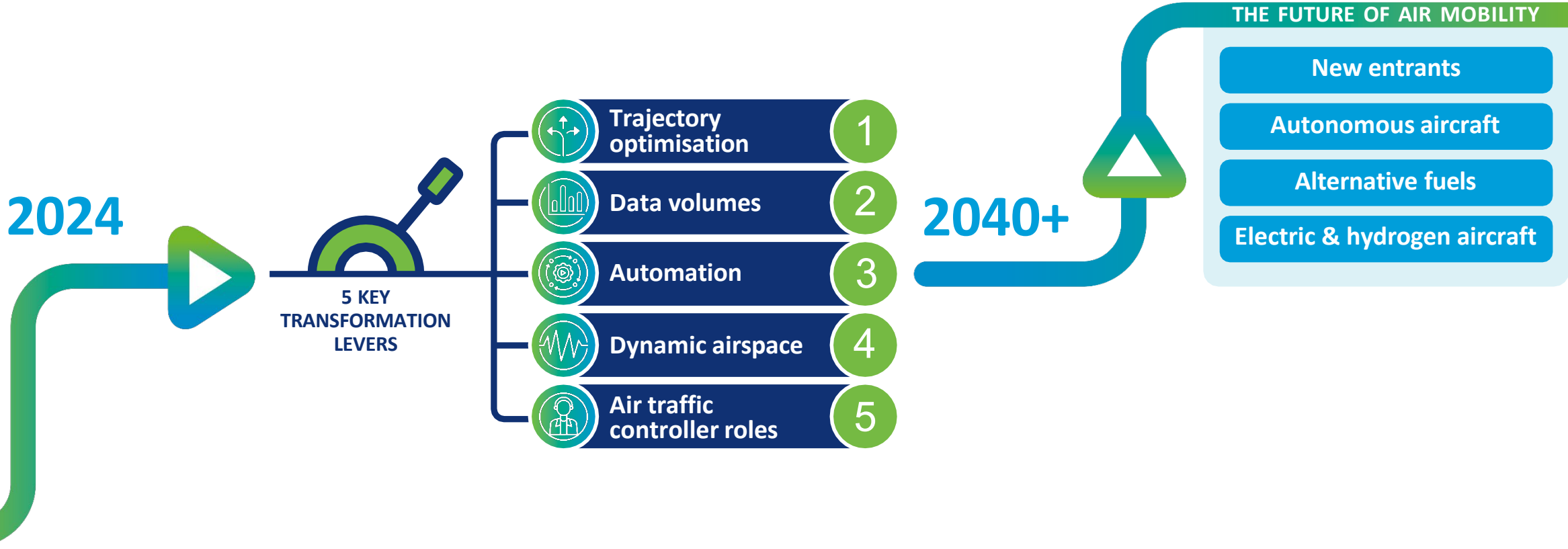


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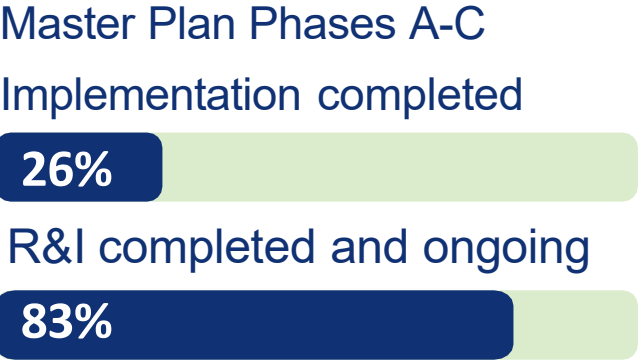
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GOALS CAN ONLY BE ACHIEVED WITH AN EVEN STRONGER FOCUS ON DIGITAL TRANSFORMATION



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A COMMON ROADMAP TO DRIVE INVESTMENT AND SHAPE FUTURE REGULATION WITH A STRONG EMPHASIS ON SPEED

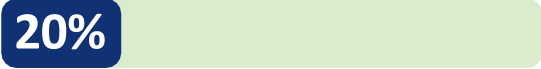


- We have to shorten the innovation cycle:**
- 1 Complete transition to a modern system architecture
 - 2 Economic regulatory framework to encourage investments on deployment priorities in future RPs
 - 3 Technical regulatory framework to facilitate implementation by early movers

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

Less available airspace due to the Ukraine war



Increase in cyber incidents from 2020 to



2040+

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

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9 MONTHS AND 100+ EXPERTS TO BUILD CONSENSUS WITH ALL KEY DECISION MAKERS REPRESENTING EUROPEAN AVIATION

European plan

NOW – JULY '24

AUGUST – DECEMBER '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



Global Air Navigation Plan (GANP)

2025

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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



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