

Strategic development

Monitoring report 2024

Strategic development monitoring report 2024

ATM MP 2025 Monitoring

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1 Introduction

1.1 Purpose

The Strategic Development Monitoring Report provides an annual update on the progress of development activities in support of the implementation of the European ATM Master Plan 2025 [Ref 2], ensuring alignment with performance ambitions and strategic vision.

1.2 Scope

The Strategic Development Monitoring Report aggregates information of executive-level information on the status of SESAR development (see Figure 1). The report focuses specifically on all development activities¹ conducted within the Digital European Sky (DES) programme.



Figure 1: Scope of the Strategic Development Monitoring Report

The Strategic Development Monitoring Report 2024 is the first to be aligned with the new European ATM Master Plan 2025 and presents aggregated information on the status of SESAR development progress up to the end of 2023.

The Strategic Development Monitoring Report complements the Strategic Deployment Monitoring Report, which assesses the progress of deployment activities².

¹ These activities consist in the development of SESAR Solutions targeting a technology readiness level up to TRL6.

² Activities beyond TRL6 covering both industrialisation and implementation phases.

2 European ATM Master Plan development progress

The European ATM Master Plan roll-out is divided into four overlapping phases (from Phase A to Phase D) to ensure a smooth transition from today's ATM system to tomorrow's Digital European Sky. Figure 2 presents development status in relation to Phases A to D of the European ATM Master Plan.

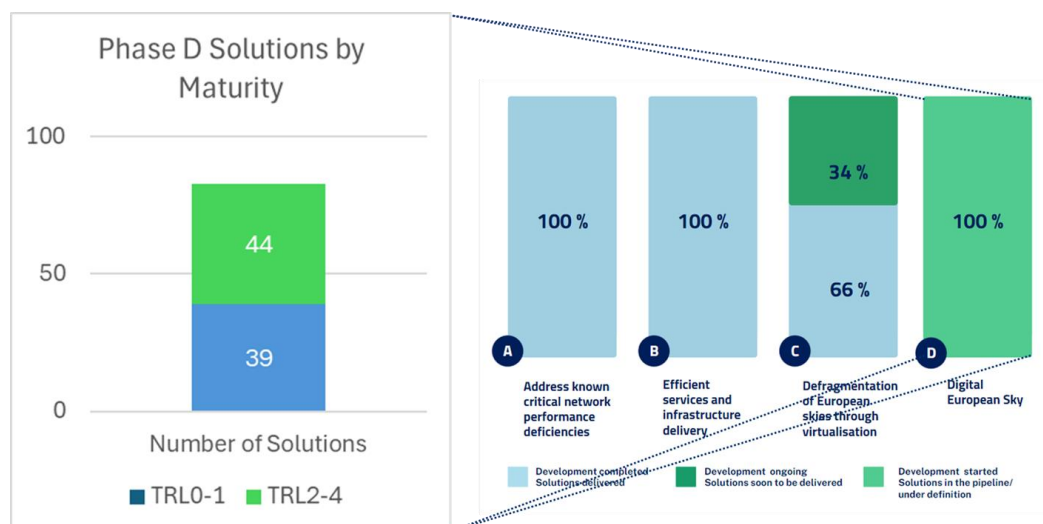


Figure 2: Development status in relation to the four phases of the European ATM MP

Both Phases A and B are completed from a development point of view (i.e. fully in deployment, monitored via the Strategic Deployment Monitoring Report 2024 [Ref 3]).

Phase C is defined by the Strategic Deployment Objectives (SDOs), which are prioritised actions that need to be fully implemented by 2035. 66% of SESAR Solutions associated with the SDOs have completed TRL6 and are already under deployment. The remaining 34% still require development activities.

The ATM Master Plan 2025 outlines development priorities (DPs) and associated development actions (DevAs) to drive forward the Digital European Sky vision for Phase D roll-out by 2045. Phase D development activities have just started in the Digital European Sky Programme under on-going calls (e.g. IR-01 and ER-01 (see Figure 2)), although the link to the DPs/DevAs is still being consolidated.

2.1 Development status in relation to Strategic Deployment Objectives

The SDOs are prioritised actions for deployment, selected following a process that evaluated the relevance and readiness of the supporting SESAR Solutions.

Figure 3 presents the development status in relation to SDOs defined in the European ATM Master Plan 2025.

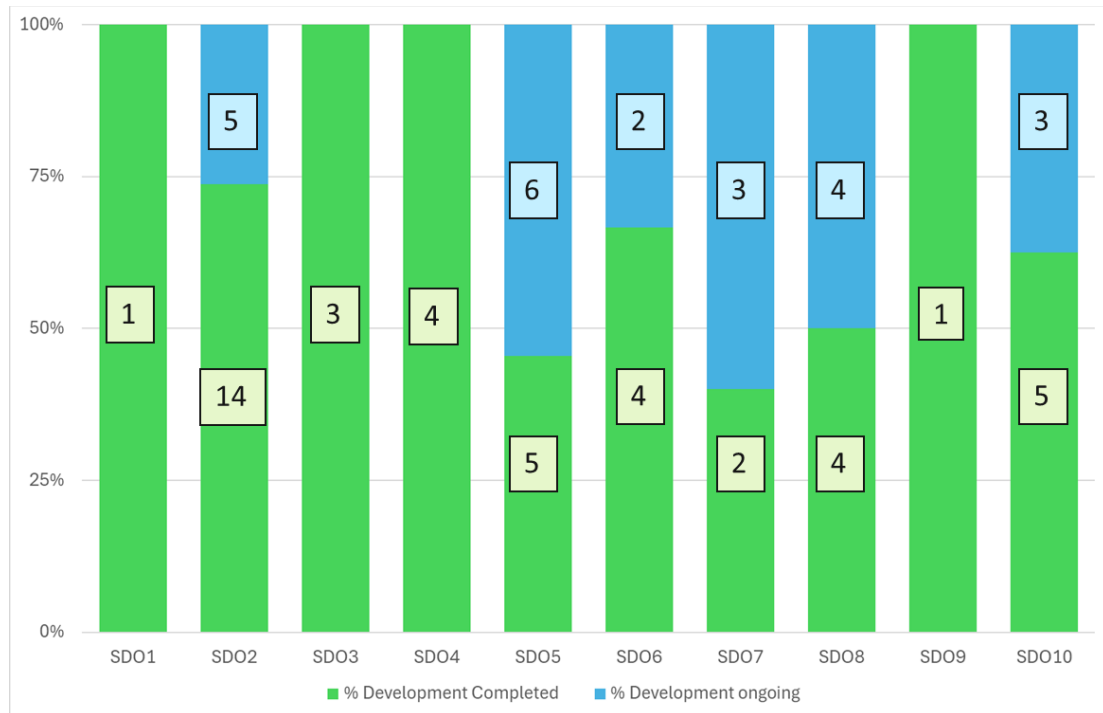


Figure 3: Development status in relation to SDOs

The development activities have already been completed for SDO #1 “Alerts for reduction of collision risks on taxiways and runways”, SDO #3 “Dynamic airspace configuration”, SDO #4 “Increased automation support” and SDO #9 “CNS optimisation, modernisation and resilience”. The development of SESAR Solutions related to the other SDOs is progressing well and the expectation is that the ongoing DES projects will complete TRL6 by mid-2026, enabling deployment by 2035.

2.2 Development status in relation to the Multi Annual Work Programme (MAWP) Strategic Research and Innovation Agenda (SRIA)

Currently, the DES programme is structured around nine flagships, as defined in the Strategic Research and Innovation Agenda (SRIA³) and further elaborated in the SESAR multi annual work programme (MAWP⁴) and DES calls.

³ <https://www.sesarju.eu/sria>

⁴ See SESAR MAWP [2].

The number of SESAR Solutions in development (considering the on-going development activities in the DES programme) in relation to the [Ref 2] flagships⁵ is presented in Figure 5.

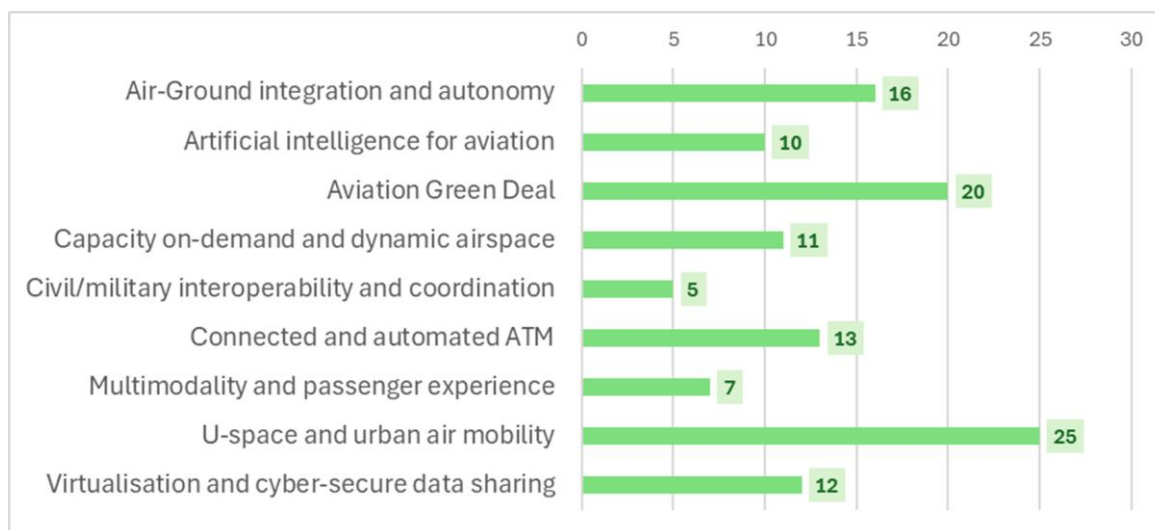


Figure 4: Development status in relation to the flagships

The DES programme snapshot at the end of 2023 shows that the three flagships with the highest number of SESAR Solutions under development are:

- U-space and urban air mobility (supporting the consolidation of U-space market ramp-up both at very low level and at the ATC interface);
- Aviation Green Deal (targeting CO₂ emission reductions and investigating non-CO₂ emissions, such as contrails);
- Air-ground integration and autonomy (progressing trajectory-based operations (TBO) concept and solutions).

⁵ The SRIA flagships are transversal to the ATM Master Plan phases, and therefore these SESAR solutions are linked either to phase C (i.e. SDOs) or to phase D (i.e. Development Priorities).

Way forward

2025 will be a year of transition, with a focus on collectively strengthening the ability to monitor the implementation of the European ATM Master Plan 2025.

In the 2025 monitoring cycle, special emphasis will be placed on addressing the following key improvement areas:

- Alignment of the Strategic Development Monitoring Report with the ATM Master Plan 2025 Development Priorities and Development Actions.
- Leveraging expected performance from SESAR Solutions to provide a better picture of expected performance improvements.

3 References

- [Ref 1] European ATM Master Plan – 2025
- [Ref 2] SESAR Multi Annual Work Plan

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