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JOINT UNDERTAKING

SESAR 3 JOINT UNDERTAKING CONSOLIDATED ANNUAL ACTIVITY REPORT 2025

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This consolidated annual activity report, established in accordance with Article 26 of Council Regulation (EU) 2021/2085 of 19 November 2021 as last amended by Council Regulation 2023/1782 of 25 July 2023 establishing the joint undertakings under Horizon Europe and with Article 23 of the Financial Rules of the SESAR 3 JU, provides comprehensive information on the implementation of the joint undertaking's work programme, budget, staff policy plan, management and internal control systems in 2025.

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FACTSHEET

Name of the joint undertaking (JU)	**Single European Sky ATM Research (SESAR) 3 Joint Undertaking (JU)**
Objectives	The mission of the SESAR 3 JU is to accelerate, through research and innovation, the delivery of an inclusive, resilient and sustainable Digital European Sky. The general objectives of the SESAR 3 JU are defined in Articles 4, 5 and 142(1) of the Single Basic Act (SBA). The specific objectives of the SESAR 3 JU are defined in Article 142(2) of the SBA. The tasks of the SESAR 3 JU are defined in Article 143 of the SBA.
Legal basis	Article 187 of the Treaty on the Functioning of the European Union and Council Regulation (EU) 2021/2085 of 19 November 2021 establishing the joint undertakings under Horizon Europe and repealing Regulations (EC) No 219/2007, (EU) No 557/2014, (EU) No 558/2014, (EU) No 559/2014, (EU) No 560/2014, (EU) No 561/2014 and (EU) No 642/2014 as amended by Council Regulation (EU) 2023/1782 of 25 July 2023
Executive Director	Andreas Boschen
Governing Board	The SESAR 3 JU Governing Board is responsible for the strategic orientation and the operations of the JU, and supervises the implementation of its activities. Chaired by the European Commission (Directorate-General for Mobility and Transport), it is composed of 55 members in addition to permanent observers from strategic partners.
Other bodies	Bodies of the SESAR 3 JU: ▪ States' Representatives Group ▪ Scientific Committee Advisory body to the Executive Director: ▪ SESAR 3 JU Programme Committee
Staff numbers([1])	36 temporary agents, 2 contract agents, 1 seconded national expert
Total budget (2025)[(2)]	Commitment appropriations: EUR 167 069 871 Payment appropriations: EUR 118 891 724
Budget implementation/execution	**Commitment appropriations (% of the committed amount/budget)** Total consumption: EUR 165 519 628 (99 %) Title 1 – EUR 6 998 391 (95 %) Title 2 – EUR 3 115 742 (83 %) Title 3 – EUR 2 402 721 (100 %) Title 4 – EUR 153 002 774 ([3]) (100 %) Title 5 – no consumption (0 %) **Payment appropriations (% of the paid amount/budget)** Total consumption: EUR 44 931 353 (38 %) Title 1 – EUR 6 660 724 (90 %) Title 2 – EUR 3 854 190 (60 %) Title 3 – EUR 2 402 721 (98 %) Title 4 – EUR 32 013 718 ([4]) (100 %) Title 5 – no consumption (0 %)

([1]) Number of employees in the JU on 31 December 2025.
([2]) Total budget includes operational budget (used for funding selected projects) and administrative budget (used for funding Programme Office activities).
([3]) This amount includes assigned revenue EUR 616 907.
([4]) This includes assigned revenue amount EUR 616 907.

Grants/tenders/prizes	68 Horizon Europe active grants (ER1, ER2 and IR1) for a total value of EUR 228.5 million in EU contribution and a total cost of EUR 399.7 million. Five of these grants were closed during 2025. One Horizon Europe grant co-funded with the Europe's Rail JU with an EU contribution of EUR 5 million (including EUR 3 million of SESAR 3 JU contribution) and a total cost of EUR 6.6 million. 10 Digital Sky Demonstrators (DSDs) grants co-funded under the Connecting Europe Facility for a total value of EUR 141.9 million in EU contribution and a total cost of EUR 296.5 million. 62 contracts resulting from procurement procedures signed for a total maximum value of EUR 3 196 088. Two prizes awarded for a total value of EUR 15 000. Total value: EUR 234.7 million (excluding DSD grants).
Strategic research and innovation agenda	Strategic research and innovation agenda for the digital European sky
Call implementation	Number of calls for proposals launched in 2025: 2 Number of proposals submitted: 121 Number of eligible proposals: 120 Number of proposals granted in 2025: 0 Number of global projects in portfolio as of the end of 2025: 63 Horizon Europe projects (ER1, ER2 and IR1), 1 Horizon Europe project co-funded with the Europe's Rail JU, and 5 Connecting Europe Facility projects (DSD1b, DSD2 and DSD3).
Participation, including small and medium-sized enterprises	Total number of beneficiaries of Horizon Europe funded projects as of the end of 2025 amounted to 803 (297 unique participants), of which: ▪ 14.8 % were small and medium-sized enterprises, which received 12.4 % of the EU funding; ▪ 58.9 % were private for-profit / large companies, which received 69.5 % of the EU funding; ▪ 2 % were non-associated, non-EU members' entities; ▪ 46 % of unique participants were newcomer entities. Total number of beneficiaries of projects funded by the Connecting Europe Facility as of the end of 2025: 61 (43 unique participants).

FOREWORD

I am pleased to present this consolidated annual activity report for 2025, a year marked by continued delivery of air traffic management (ATM) research and innovation and focused on preparing the next phase of the Digital European Sky (DES).

Following the adoption of the new *European ATM Master Plan* at the end of 2024, our priority in 2025 was to translate this common vision into concrete action. In particular, we initiated the preparation of a proposal for a new common project, Common Project 2 (CP2), which will define the next regulatory step for coordinated deployment of SESAR Solutions. Developed with the active involvement of the entire ATM community, this CP2 proposal will be key to translating innovation into operational performance and ensuring a coherent and timely implementation of ATM modernisation at the European level.

At the same time, the SESAR 3 Joint Undertaking (SESAR 3 JU) continued to deliver on its core mission. The launch of the third exploratory research call and the second industrial research call, with a combined EU budget of over EUR 250 million, represents the largest investment in ATM innovation under the current programme. The strong response from the sector, reflected in the high number of proposals submitted, confirms both the vitality of the European ATM ecosystem and the continued need for coordinated European action. Our project portfolio also delivered tangible results, with new SESAR Solutions reaching higher maturity and moving closer to operational deployment.

These achievements come at a time when the need to modernise Europe's ATM system has never been clearer. Persistent capacity constraints, increasing operational complexity, and the integration of new entrants are putting growing pressure on the network. At the same time, aviation must accelerate its contribution to climate objectives and strengthen its resilience in a rapidly evolving geopolitical context. Without sustained investment in ATM innovation and a step change in its coordinated deployment, these challenges risk undermining Europe's competitiveness, security and sustainability.

In this context, 2025 has also been a key year in preparing the future of the SESAR JU. The work on CP2, the development of the Aviation Research and Innovation Strategy (ARIS), and the active engagement of our Governing Board members are laying the foundations for the next phase of ATM modernisation under the upcoming multiannual financial framework. The SESAR 3 JU has demonstrated its capacity to deliver, to mobilise the full aviation value chain and to ensure coherence across research, innovation and deployment, as confirmed by the positive outcome of the Horizon Europe interim evaluation. Sustaining this momentum will require continued commitment from all partners in terms of engagement, investment and shared ownership.

I would like to thank all our members, partners, stakeholders and staff for their continued commitment and support. The achievements of 2025 demonstrate the strength of our unique partnership and our ability to deliver results collectively. Building on this progress, we will continue to turn innovation into tangible improvements for the European aviation system, delivering concrete benefits for citizens and industry alike, and making Europe the most efficient and environmentally friendly sky to fly in the world.

Andreas Boschen
Executive Director of the SESAR 3 Joint Undertaking

EXECUTIVE SUMMARY

In 2025, the SESAR 3 JU successfully implemented the second year of its 2024–2025 biannual work programme, delivering on its operational objectives and further advancing the Digital European Sky. Building on the major milestones achieved in 2024, the JU continued the digital transformation of the ATM sector through the implementation of the updated *European ATM Master Plan*, contributing to the European Union's strategic objectives in competitiveness, sustainability and resilience.

Preparation of a proposal for Common Project 2

Following its adoption in December 2024, the *European ATM Master Plan* entered its implementation phase in 2025. The SESAR 3 JU initiated preparatory work for a proposal for a new common project, which will constitute the next regulatory step to support the coordinated deployment of selected strategic deployment objectives. A dedicated governance structure involving more than 120 experts from across the ATM ecosystem was established, with the aim of ensuring alignment and buy-in, and the first elements of the proposal were developed, reaching the expected intermediate milestone for submission to the European Commission in 2026.

Implementation of the Digital European Sky programme

The SESAR JU ensured the effective implementation of the Digital European Sky programme through the management of its portfolio of research and innovation projects. Progress at the programme level in implementing the Master Plan was reported through the strategic development and deployment monitoring reports.

In 2025, two major calls for proposals were launched: the third exploratory research call (ER3) and the second industrial research call (IR2), aligned with the development priorities defined in the Master Plan. With a combined budget of over EUR 250 million, the highest since the launch of the SESAR JU, these calls were successful and attracted strong participation from the aviation research and industrial communities across Europe, and beyond. The evaluation of proposals was completed by the end of the year and grant agreements signature is planned for 2026.

At the same time, the JU continued to steer and monitor the ongoing portfolio of projects under the previous exploratory research (ER), industrial research (IR) and Digital Sky Demonstrator (DSD) calls. In 2025, projects under the first exploratory research call (ER1) and DSD1a finalised their activities, and their results were consolidated through release 15. This resulted in 47 maturity gates, with all but two successfully completed, leading to the delivery of eight new SESAR Solutions at higher maturity levels, and the identification of standardisation and regulatory needs essential for their industrialisation and implementation.

Efforts to accelerate market uptake of SESAR Solutions continued through the DSDs, notably with the consolidation of DSD1a results and the launch of new demonstration activities under a project funded through the DSD3 call. However, due to uncertainty regarding the available Connecting Europe Facility budget, the preparation of the DSD4 call could not be carried out in 2025 and is expected to resume once funding conditions have been clarified.

Beyond demonstration activities, the SESAR 3 JU continued to support the industrialisation and deployment of SESAR Solutions through close coordination with key stakeholders, including the European Union Aviation Safety Agency and European standardisation bodies, to anticipate regulatory and standardisation needs and facilitate the transition from development to deployment.

Stakeholder engagement and coordination across the ATM ecosystem

Throughout 2025, the SESAR 3 JU further strengthened its role as the central coordinator of ATM modernisation in Europe by fostering cooperation and alignment among stakeholders. A key achievement was the joint development, together with the Clean Aviation JU and the broader aviation community, of the Aviation Research and Innovation Strategy, which provides a common roadmap for aviation research and innovation in Europe in view of the next EU multiannual financial framework (2028–2034).

Cooperation with space stakeholders was further developed, notably through continued collaboration with the EU Agency for the Space Programme and engagement with the European Space Agency, while synergies with national and regional programmes were pursued, including through the signature of cooperation arrangements with the regions of Campania and Galicia.

The SESAR 3 JU continued to engage actively with the aviation community through participation in major international events, including Airspace World, and through the organisation of key events such as the SESAR Innovation Days. These activities provided a platform to showcase research results, promote innovation and strengthen links with stakeholders across the sector, including academia. In addition, the SESAR 3 JU published throughout the year in both EU and specialised press and maintained a dynamic online presence to promote its activities and achievements.

International presence

The SESAR 3 JU reinforced its international engagement to ensure global interoperability of ATM solutions and to promote European leadership in aviation. In particular, the JU actively contributed to the 42nd International Civil Aviation Organization Assembly and supported alignment between the *European ATM Master Plan* and the updated International Civil Aviation Organization Global Air Navigation Plan. In addition, the JU strengthened cooperation with Japan, Singapore, South Korea and the United States, focusing on topics of common interest such as advancing innovation in ATM, the integration of new entrants, trajectory-based operations, and innovative air mobility. Those activities strengthen the global relevance of SESAR Solutions and support EU industrial competitiveness worldwide.

Efficient and effective organisation

Throughout the year, the SESAR 3 JU maintained a high level of efficiency in implementing its activities, ensuring sound financial management and compliance with Horizon Europe targets for grant management. The error rate related to the legality and regularity of grant expenditure remained below the Horizon Europe benchmarks, and the JU received a positive discharge from the European Parliament for the 2023 financial year. The JU systematically reviewed available control results, indicators and audit observations (internal auditor and European Court of Auditors) to assess their impact on management assurance. Overall, management has reasonable assurance that suitable controls are in place and are working as intended, and that risks are appropriately monitored and mitigated. On this basis, the executive director concluded positively on the assurance framework and signed the declaration of assurance.

This strong management performance is further evidenced by the positive outcome of the interim evaluation of Horizon Europe, which confirmed the SESAR 3 JU's achievements, performance, added value, cost-effectiveness and capacity to mobilise significant public and private investment with relatively low administrative overheads.

In parallel, the JU continued to leverage back-office arrangements as a key efficiency gains measure. It also continued its internal transformation towards a more digital and environmentally sustainable organisation, notably with the implementation of the digitalisation action plan, while progress towards the introduction of the eco-management and audit scheme, in cooperation with EUROCONTROL, remained limited.

Overall, the SESAR 3 JU demonstrated in 2025 its capacity to deliver on its objectives, coordinate a complex multi-stakeholder innovation ecosystem, and contribute effectively to the modernisation of Europe's ATM system in support of a more competitive, resilient and sustainable aviation.

S5-MTP
S5-MTR

1 Implementation of the 2025 annual work programme

1.1 Key objectives for 2025, associated risks and corrective measures

In 2025, the SESAR 3 JU successfully implemented the second half of its 2024–2025 biannual work programme (BAWP) and the associated operational objectives. By doing so, it continued to progress towards achieving the objectives set out in its Single Basic Act (SBA) ([5]), and towards the delivery of the Digital European Sky (DES). This section provides a summary of the key achievements and progress made on the operational objectives in 2025, while further details can be found in the dedicated sections of this document, covering each strategic area of operation along with support for operations, governance, financial management and internal control.

In addition, measurements of key performance indicators (KPIs) for Horizon Europe and specific to the JU are provided in Annexes 3, 4 and 5. Section 1.7 describes the progress against those KPIs.

The SESAR 3 JU ran its annual risk assessment, and the outcome is reported in Section 4.3.2.

Progress and achievement on the 2025 operational objectives

In 2025, the SESAR 3 JU continued to implement the objectives set out in the 2024–2025 BAWP, building on the major milestones achieved in 2024 and advancing the delivery of the DES.

Following the adoption of the updated *European ATM Master Plan* in December 2024, activities in 2025 focused on its implementation and on translating its priorities into concrete actions. The SESAR JU launched the preparatory work for **a proposal for the content of a new common project (objective 2)** which will provide the next regulatory step in the deployment of the Master Plan's strategic deployment objectives (SDOs). A dedicated governance structure involving a wide range of stakeholders was established, and the first elements of the proposal were developed. By the end of the year, the work had reached the expected intermediate milestone required for a submission of the proposal to the European Commission in 2026.

The SESAR 3 JU also successfully launched **a new wave of calls aligned with the priorities defined in the new Master Plan (objective 3)**. The third exploratory research call (ER3) and the second industrial research call (IR2) were published in January 2025 and attracted strong interest from the air traffic management (ATM) research and industrial communities. The evaluation of proposals was completed by the end of the year, paving the way for the signature of the corresponding grant agreements in 2026.

Efforts continued **to build a critical mass of early movers to support the market uptake of SESAR**

([5]) Council Regulation (EU) 2021/2085 of 19 November 2021 establishing the joint undertakings under Horizon Europe and repealing Regulations (EC) No 219/2007, (EU) No 557/2014, (EU) No 558/2014, (EU) No 559/2014, (EU) No 560/2014, (EU) No 561/2014 and (EU) No 642/2014 (OJ L 427, 30.11.2021, p. 17, ELI: http://data.europa.eu/eli/reg/2021/2085/oj); as amended by Council Regulation (EU) 2023/1782 of 25 July 2023 amending Regulation (EU) 2021/2085 establishing the joint undertakings under Horizon Europe, as regards the Chips Joint Undertaking (OJ L 229, 18.9.2023, p. 55, ELI: http://data.europa.eu/eli/reg/2023/1782/oj). The SESAR 3 JU's objectives are set out in Articles 4, 5, 142 and 143.

Solutions (objective 4). In 2025, the SESAR 3 JU **consolidated the results of the projects funded under the first Digital Sky Demonstrator call (DSD1a)**, which demonstrated existing SESAR Solutions at technology readiness level (TRL) 7 and 8 and delivered new ones at TRL6 or higher, supporting the progress towards the completion of some SDOs. Preparatory work also continued in relation to future demonstration activities, although the launch of the DSD4 call under the Connecting Europe Facility (CEF) by the European Climate, Infrastructure and Environment Executive Agency (CINEA) could not take place in 2025. As a result, the **preparation of the technical specifications for DSD4** was postponed and is expected to resume once the funding envelope is confirmed, potentially in 2026.

In 2025, the SESAR 3 JU further continued to **promote and develop synergies in high priority areas linked to its mission (objective 6)**. In particular, the JU worked closely with the Clean Aviation JU and the broader aviation community on the Aviation Research and Innovation Strategy (ARIS), which provides a **common roadmap for aviation research and innovation** in Europe. Progress was also made in developing cooperation with national and regional programmes, including through the conclusion of two memoranda of cooperation (MoCs) with European regions. The **development of a comprehensive plan with the States Representatives' Group (SRG) to capture synergies with national programmes** did not materialise due to limited availability of information and engagement of states representatives in this activity.

The SESAR 3 JU achieved a major milestone in 2025 with the **successful outcome of the Horizon Europe interim evaluation (objective 7)**, which confirmed the strong performance and added value of the JU in delivering coordinated innovation for ATM modernisation, while demonstrating its cost-effectiveness in mobilising significant public and private investment with relatively low administrative overheads.

At the programme level, the SESAR 3 JU ensured the continued **delivery of the first wave of projects (objective 8)** funded under the first exploratory research call (ER1), second exploratory research call (ER2) and first industrial research call (IR1). Project reviews confirmed their overall progress and alignment with programme objectives, while maturity gates conducted during the year validated the results delivered by several projects and supported the transition of promising solutions towards higher levels of maturity.

The SESAR 3 JU also intensified its **engagement with international partners to ensure global interoperability of ATM solutions (objective 9)**. In particular, the JU actively contributed to the 42nd International Civil Aviation Organization (ICAO) Assembly and worked to **ensure alignment between the Master Plan and the updated ICAO global air navigation plan (GANP)**, reinforcing the global relevance of SESAR Solutions and the leadership of Europe in ATM modernisation.

Finally, the SESAR 3 JU continued implementing its internal **transformation towards a greener and more digital workplace (objective 10)**. The annual **action plan for the digitalisation of the organisation** was fully implemented, while in parallel the introduction of the **eco-management and audit scheme (EMAS)** in the SESAR JU premises at the Haren site, which depends on the cooperation with EUROCONTROL, has not progressed.

Table 1 outlines the SESAR 3 JU's operational objectives for 2024–2025, along with the results achieved in 2025 and references to where further details can be found in this report.

TABLE 1: PROGRESS AND ACHIEVEMENTS AGAINST THE 2024–2025 BAWP OPERATIONAL OBJECTIVES IN 2025

No	Operational objectives for 2024–2025	Key performance indicators	Target for 2024	Target for 2025	Related strategic area of operation (SAO) / activities	Result in 2025	Detail in Section(s)
1	**Update the *European ATM Master Plan* to make Europe the most efficient and environmentally friendly sky to fly in the world**	Adoption of the updated *European ATM Master Plan*	100 %	Not applicable (n/a)	SAO 1: provide strategic steering to the DES programme	n/a	n/a
2	**Prepare a proposal for the content of a new Common Project (CP) or alternative regulatory measures leveraging the outcome of SESAR 2020 and aligned with the deployment priorities defined in the new *European ATM Master Plan***	Deliver a proposal for a new CP to the Directorate-General (DG) for Mobility and Transport	n/a	50 % ([6])	SAO 4: facilitate an accelerated market uptake of SESAR Solutions	50 %	1.2.4.2
3	**Launch a new wave of ER/IR calls aligned with the priorities defined in the new *European ATM Master Plan***	Launch a new wave of ER/IR projects aligned with the priorities identified in the *European ATM Master Plan*	n/a	100 %	SAO 2: deliver exploratory research SAO 3: deliver industrial research and validation	100 %	1.2.2.3 1.2.3.2 1.3.1 1.4
4	**Continue to build a critical mass of early movers to accelerate the market deployment of phase C**	Provide technical specifications in view of the DSD3 call	100 %	n/a	SAO 4: facilitate an accelerated market uptake of SESAR Solutions	n/a	1.2.4.1
		Provide technical specifications in view of the DSD4 call	n/a	100 %		Not required at this stage	1.2.4.1
		Consolidate results from the first DSD1a call	n/a	100 %		100 %	1.2.4.1
5	**Complete the targeted membership expansion**	Complete the selection process of associated members	100 %	n/a	All	n/a	n/a
6	**Promote and develop synergies in high priority areas linked to the mission of the JU**	Develop a common roadmap with content and timelines with the Clean Aviation JU	50 %	100 %	SAO 4: facilitate an accelerated market uptake of SESAR Solutions	100 %	1.2.1.1
		Sign an MoC with the European Union Agency for the Space Programme (EUSPA)	100 %	n/a		n/a	n/a
		Develop, together with the SRG, a plan to capture synergies with national programmes	50 %	100 %		50 %	1.2.5.1

([6]) The 50 % target of this objective reflects the fact that the activities started in 2025 will continue in 2026.

No	Operational objectives for 2024–2025	Key performance indicators	Target for 2024	Target for 2025	Related strategic area of operation (SAO) / activities	Result in 2025	Detail in Section(s)
7	**Secure a positive midterm review outcome**	Positive outcome of the midterm review	n/a	100 %	All	100 %	2.5.2
8	**Ensure the delivery of the first wave of awarded projects**	Ensure the delivery of ER projects through project reviews and deliver a strategic development monitoring report	100 %	100 %	SAO 2: deliver exploratory research SAO 3: deliver industrial research and validation	100 %	1.2.2.1 1.2.2.2
		Ensure the delivery of IR projects through project reviews and deliver a strategic development monitoring report	100 %	100 %		100 %	1.2.3.1
9	**Ensure global interoperability through active engagement with international partners, in particular towards the 42nd ICAO Assembly in 2025**	Alignment between the GANP and the updated *European ATM Master Plan*	n/a	100 %	SAO 5: deliver SESAR outreach (cooperation, synergies and cross-cutting themes and activities)	100 %	1.2.5.3
10	**The transformation of our organisation into a greener and more digital place to work**	Implementation rate of the action plan to introduce EMAS in cooperation with EUROCONTROL	30 %	60 % ([7])	All	30 %	2.7.3
		Implementation rate of the action plan to digitalise the organisation	50 %	100 %		100 %	2.7.1

([7]) Due to the underachievement this objective has been included in the 2026–2027 BAWP and will continue to be implemented in the coming years.

1.2 Research and innovation activities/achievements

1.2.1 Strategic area of operation 1: provision of strategic steering to the Digital European Sky programme

1.2.1.1 Aviation Research and Innovation Strategy

In 2025, the SESAR 3 JU and the Clean Aviation JU jointly initiated and supported the development of *Aviation Research and Innovation Strategy (ARIS) – A pathway to competitive and sustainable aviation supporting Europe's sovereignty*, in close collaboration with over 100 organisations from the aviation industry, research and academia.

ARIS provides a unified, long-term vision for European aviation research and innovation (R & I) in the context of the preparation of the 2028–2034 multiannual financial framework (MFF). It identifies the sector's strategic needs and priorities to preserve Europe's global leadership in aviation while achieving climate neutrality, strengthening competitiveness and reinforcing European sovereignty in a rapidly evolving geopolitical environment.

Within this common framework, the strategy reflects the complementary yet different innovation pathways across the aviation value chain. ATM modernisation entails system transformation of a highly regulated and safety critical sector where innovation must be synchronised among Member States and stakeholders (air navigation service providers (ANSPs), airports, the Network Manager, civil-military stakeholders and new airspace users), therefore requiring orchestration at the European level. Against this backdrop, ARIS establishes a common roadmap, including agreed content and timelines, jointly developed between the SESAR 3 JU and the Clean Aviation JU, as envisaged under operational objective 6 of the 2024–2025 BAWP, to promote and develop synergies in high-priority areas linked to the mission of the JU.

From the SESAR 3 JU perspective, ARIS builds directly upon and fully aligns with the *European ATM Master Plan*, which remains the single roadmap for ATM modernisation in Europe. It reinforces the Master Plan's timeline and priorities, confirming that achieving its objectives requires sustained and synchronised investment across the entire ATM innovation value chain, from research to validation and coordinated pan-European deployment.

ARIS also provides a consolidated estimate of the investment from both the EU and the private

sector required to keep aviation on track to achieve 2050 objectives. For ATM, this translates into approximately EUR 2 billion (including EUR 700 million from the EU) for R & I, and EUR 3 billion (including EUR 1.5 billion from the EU) for deployment and market uptake over the 2028–2034 period. These figures reflect the scale of effort required to deliver the DES in line with the Master Plan and to ensure the maturation of the development priorities (DPs) and a timely implementation of its SDOs.

ARIS also reaffirms the value of the JU collaborative model as a proven and effective instrument to sustain European leadership in ATM and aircraft technologies, accelerate decarbonisation, and project European standards and solutions globally.

The strategy was formally handed over to Commissioner Apostolos Tzitzikostas at the Paris Air Show in June 2025, symbolising the sector's united commitment to a coordinated European aviation R & I agenda and to a strengthened role for aviation in the EU's competitiveness, sovereignty and sustainability objectives. It was also discussed with Commissioner Ekaterina Zaharieva at a meeting in October 2025.

1.2.1.2 Progress and status of the Digital European Sky programme

DES projects portfolio

The DES programme is implemented through a portfolio of projects managed by the SESAR 3 JU and addressing the development and deployment of technological solutions aiming at improving the performance of the ATM system. Figure 1 shows the DES project portfolio in 2025. The projects highlighted in blue (under ER1 and DSD1a) were closed in 2025.

FIGURE 1: **DES PROGRAMME PROJECTS PORTFOLIO IN 2025**

Detailed information on individual SESAR projects under the DES programme is available on the SESAR 3 JU Projects Portal ([8]).

([8]) The SESAR 3 JU Projects Portal also includes information about completed projects from the SESAR 2020 programme.

Status of the development activities of the DES programme

At the Governing Board (GB) meeting of December 2025, the SESAR 3 JU presented the development monitoring report ([9]) covering the latest progress and status updates on the implementation of the DES up to the end of 2024.

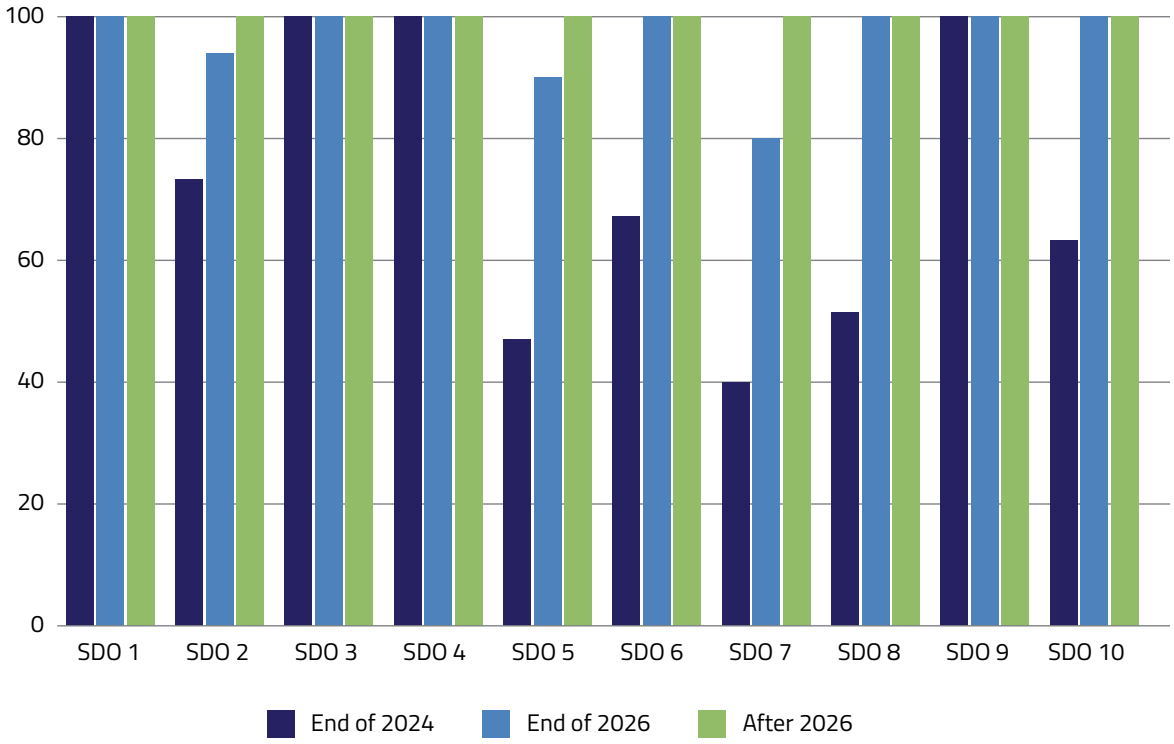
The report confirmed the continued momentum of the programme. It highlighted a steady increase in the maturity levels of solutions under development, particularly at lower TRL levels. However, the TRL6 solutions from the IR1 call are expected in 2026, following their maturity gate reviews. Phase C completion therefore remains at 66 %.

FIGURE 2: **STRATEGIC DEPLOYMENT OBJECTIVES (SDOs)**

By the end of 2024, development of all solutions supporting SDO1, SDO3, SDO4 and SDO9 had been completed. For the remaining six SDOs, development activities are progressing as planned. Most are being addressed through IR1 projects, with a limited number of residual development needs under SDO2, SDO5 and SDO7, covered by IR2 projects. These solutions remain on track to support timely deployment by 2035, notably through the forthcoming Common Project 2 (CP2) (Figure 3).

([9]) The *Strategic Development Monitoring Report 2025* is available on the SESAR 3 JU website.

FIGURE 3: **ANTICIPATED PROGRESS IN THE DEVELOPMENT RELATED TO THE SDOs BEYOND 2024**



In 2025, the SESAR 3 JU intensified its monitoring and steering of funded projects, ensuring the timely completion of maturity gates.

The development priorities which underpin phase D are covered by the ER3 and IR2 calls launched in 2025. A gap assessment to be conducted in 2026, taking into account the expected outcomes of these projects, will evaluate the progress towards the completion of phase D and help identify any remaining areas requiring further development.

Status of the SESAR deployment activities

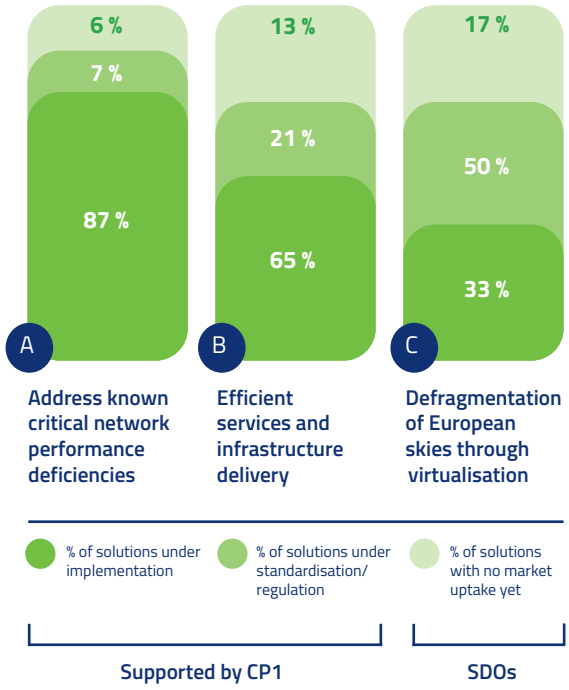
The *Strategic Deployment Monitoring Report 2025 (*[10]), presented to the GB in December 2025, provided a consolidated overview of progress on the deployment (i.e. industrialisation and implementation) in relation to the first three phases (A, B and C) of the Master Plan.

Deployment momentum continues to build. Of the 139 SESAR Solutions available, 62 % are already under implementation – including 20 % which are fully deployed – while the remaining 38 % are advancing through industrialisation. Figure 4 provides a detailed overview of the deployment progress across phases A and B, which is supported by CP1 ([11]), and phase C, which is linked to the SDOs and will be supported by CP2.

([10]) The *Strategic Deployment Monitoring Report 2025* is available on the SESAR 3 JU website.

([11]) Commission Implementing Regulation (EU) 2021/116 of 1 February 2021 on the establishment of the Common Project One supporting the implementation of the European Air Traffic Management Master Plan provided for in Regulation (EC) No 550/2004 of the European Parliament and of the Council, amending Commission Implementing Regulation (EU) No 409/2013 and repealing Commission Implementing Regulation (EU) No 716/2014 (OJ L 36, 2.2.2021, p. 10, ELI: http://data.europa.eu/eli/reg_impl/2021/116/oj).

FIGURE 4: **DEPLOYMENT STATUS OF SESAR SOLUTIONS IN EACH PHASE**



The report also highlights the continued progress on the implementation of CP1, with 91 % of implementation activities either completed or ongoing. By the end of 2024, 46 % of CP1 elements were already in operation, compared to 42 % a year earlier, indicating a steady improvement, although some delays have been identified for the implementation of ATM functionality 5 (AF5) and 6 (AF6).

Progress on the SDOs is also positive. While CP2 will be the main instrument supporting their deployment, not all SDOs fall within its scope and will therefore rely on other means of implementation. Encouragingly, all SDOs are already progressing into industrialisation, but progress is uneven and requires close monitoring. The submitted fourth reference period (RP4) (2025–2029) performance plans show early movers' clear intention to implement SDOs. In parallel, ongoing DSD projects are contributing to 6 out of 10 SDOs ([12]) and have completed demonstration activities on SESAR Solutions related to SDO2 and SDO10.

For the first time, the *Strategic Deployment Monitoring Report* includes an overview of the alignment of investments at the national level with the Master Plan as reported under the performance and charging scheme. Initial signals are positive, with 15 Member States having indicated alignment with the Master Plan. However, the aggregated investment level falls short of the ambition of EUR 2.1 billion for RP4 to support the SDOs. If this potential under-investment is confirmed, it could delay the roll-out of the Master Plan and shift a considerable investment burden onto the fifth reference period (RP5) (2030–2034), where needs are already estimated at around EUR 6 billion.

1.2.1.3 Activities linked to the transversal projects

Three transversal projects support the SESAR 3 JU in its steering of the DES programme. Their activities contribute to the alignment of individual projects with the Master Plan, including their performance design and assessment, ensuring a more efficient delivery of the SESAR Solutions, and fostering an ATM network of talent.

AMPLE3 and PEARL

AMPLE3 (market uptake and architecture modelling) and PEARL (performance estimation, assessment, reporting and simulation) assisted the JU in the steering of projects.

In 2025, they supported projects in their SESAR architecture development and consolidation activities in preparation for maturity gates through a set of training and ad hoc exchanges on the content. They also provided monitoring views on progress in the implementation of the Master Plan, producing supporting material for the elaboration of the strategic deployment and development monitoring reports.

([12]) This refers to the nine DSDs projects under the DSD1a, DSD1b and DSD2 calls, which deliver on SDO2, SDO5, SDO6, SDO7, SDO8 and SDO10.

AMPLE3 also contributed to the definition of the CP2 content by delivering a first proposal for the SDO deployment plan, along with a first CP2 cost-benefit analysis.

PEARL consolidated the performance framework, aligning it with the Master Plan, and prepared a performance analysis campaign to be carried out in 2026 with the DES projects.

Engage 2

Engage 2 continued to strengthen cooperation between research, education and industry in the ATM domain, consolidating its role as a platform for interaction, skills development and knowledge exchange. Throughout 2025, the project supported the SESAR 3 JU at major outreach and research events, including the SESAR Innovation Days, and maintained a strong presence at international fora such as Airspace World, contributing to the consolidation of a broad stakeholder network.

Education and training activities were further reinforced through an updated mapping of aviation-related university programmes across European Civil Aviation Conference countries at the undergraduate, MSc and PhD levels.

Activities addressing the thematic challenges – climate impact analysis and mitigation of ATM-related non-CO_2 emissions, passenger-centric digital airports, disruptive ATM system modernisation and integration of new entrants – were implemented. The first thematic workshop, focusing on the integration of new airspace entrants, was successfully delivered during Airspace World 2025 in Lisbon. In parallel, research and innovation activities progressed through the development of the ATM concept roadmap, exploring long-term research directions beyond the current Master Plan and strategic research and innovation agenda (SRIA) horizons, including the experimental use of generative AI tools.

Providing support to early-career researchers and students remained a core priority. Five of the seven Catalyst projects funded under the first call were approved, with the remaining two scheduled for approval in early 2026, and a new catalyst funding call was launched in December 2025.

Other activities included a winter school in Belgrade, a summer school at TU Braunschweig (Germany) with the participation of PhD students funded by Engage 2, and a hackathon in Madrid, bringing together students and industry representatives to address ATM-related challenges.

A key milestone was the official launch of the Engage 2 matchmaking application during the SESAR Innovation Days, designed to connect students and early-career researchers with ATM professionals and organisations and to link education pathways to future ATM career profiles.

1.2.2 Strategic area of operation 2: delivery of exploratory research

1.2.2.1 Status of the first Digital European Sky exploratory research call (HORIZON-SESAR-2022-DES-ER-01)

During 2025, the projects funded under the first exploratory research call (ER1) of the DES programme have progressively finalised their research activities. All maturity gates were conducted to assess the quality of the technical deliverables and confirm the maturity of the research results achieved. The outcome was positive, with only two solutions not reaching the targeted TRL2 maturity level. Additional work will be required for these solutions to meet the maturity criteria. The remaining 29 solutions achieved their target maturity level of TRL1 or TRL2, and even TRL4 in one case. Details on these solutions are provided in Annex 11 and in the SESAR Solutions Catalogue.

Following the completion of the maturity gates, the projects initiated the six-month communication and dissemination phase. This phase aims to ensure that research findings and achievements are shared in a clear and relevant manner, highlighting their impact and significance for the aviation ecosystem. By the end of 2025, five projects (E-CONTRAIL, MultiModX, HYPERSOLVER, MAIA and MUSE) had been formally closed, while the remaining thirteen are expected to close by the end of February 2026. The Engage 2 project will continue until 2027.

1.2.2.2 Status of the second Digital European Sky exploratory research call (HORIZON-SESAR-2023-DES-ER-02)

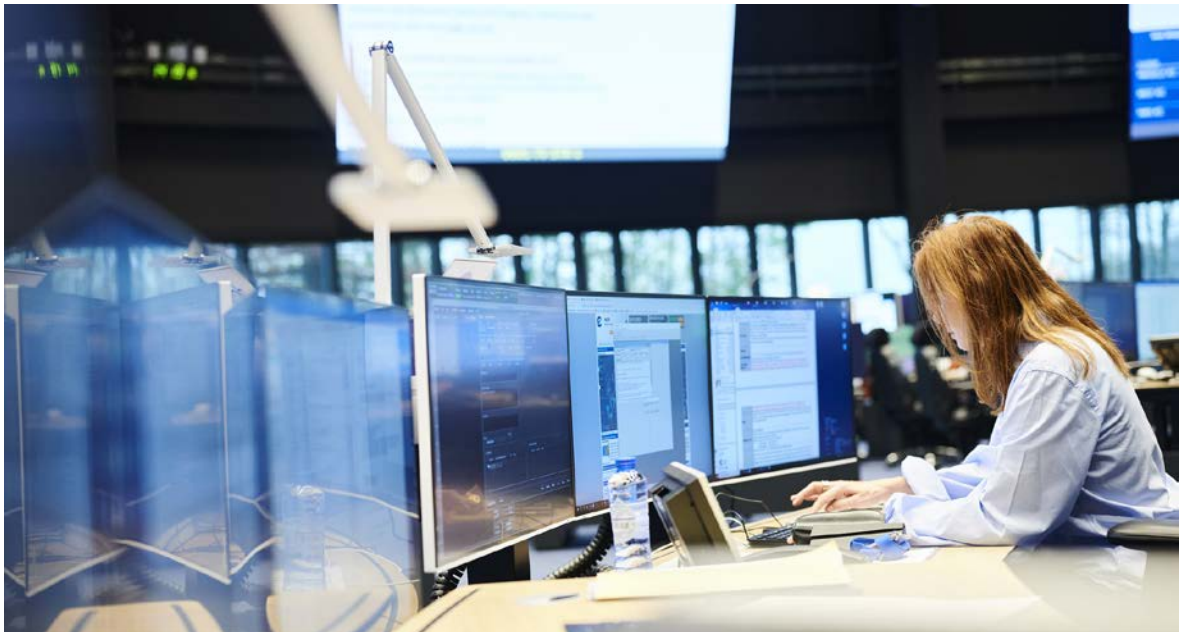
Following their ramp-up in 2024, the 18 projects under the second exploratory research call (ER2) have been progressing as planned. After summer 2025, a first technical projects review was conducted. The objective was to evaluate whether the activities completed thus far were aligned with the projects' goals and to identify any necessary corrective measures. This review of the early results was crucial for ensuring the successful delivery of the research outcomes and keeping the projects on track. The outcome of the reviews was positive in terms of quality and research developments, confirming that the progress of the projects was aligned with the SESAR 3 JU's expectations.

1.2.2.3 Status of the third Digital European Sky exploratory research call (HORIZON-SESAR-2025-DES-ER-03)

Aligned with the DPs defined in the 2025 Master Plan, the ER3 call was published on 15 January 2025, opened for submission on 1 April 2025 and closed on 16 September 2025. With a budget of EUR 24 million, the ER3 call focused on disruptive technologies and innovative concepts that are in the early stages of development. The primary aim is to explore new ideas, concepts, methods and technologies that would help define future development activities in ATM aligned with the long-term vision of the DES. In the fundamental research area, the call mainly addressed the impact of ATM on climate change, digital flight rules, and quantum sensing and computing applied to ATM. Bridging fundamental research and higher maturity industrial research, applied research addressed research to help shape the future regulatory framework for the DES and the integration of the next generation aircraft for zero-/low-emission aviation.

The evaluation of the 81 eligible proposals was concluded in December 2025 ([13]). The list of selected proposals was presented to the GB in December and approved by written procedure on 13 January 2026. Following the grant agreement preparation phase, the grants will be signed in the second quarter (Q2) of 2026.

1.2.3 Strategic area of operation 3: delivery of industrial research and validation



1.2.3.1 Status of the first Digital European Sky industrial research call (HORIZON-SESAR-2022-DES-IR-01)

The 32 projects under the first industrial research call (IR1) of the DES programme continued to progress as planned. A second wave of technical project reviews was conducted in spring 2025 to assess the progress made in the development of the SESAR Solutions. The reviews confirmed the alignment of the activities with the projects' goals, with corrective measures required in some cases. The project reviews also provided an opportunity to initiate preparations of the maturity gates scheduled from spring 2026 onwards.

The successful delivery of IR1 projects will be crucial for the DES programme, with 24 SESAR Solutions relevant for the SDOs expected to be delivered at a maturity level of TRL6 or TRL7. Upon completion of IR1 projects, 95 % of the SDOs' solutions identified in the 2025 Master Plan are planned to have been delivered.

([13]) Details on the applicants and evaluation process of the ER3 call is provided in sections 1.3.1 and 1.4.

1.2.3.2 Status of the second Digital European Sky industrial research call (HORIZON-SESAR-2025-DES-IR-02)

Aligned with the DPs defined in the 2025 Master Plan, the IR2 call was published on 15 January 2025, opened for submission on 1 April 2025 and closed on 16 September 2025. With a budget of EUR 230 million – the largest ever allocated to a single SESAR 3 JU call – the IR2 call aims to significantly advance the six development priorities defined in the ATM Master Plan in relation to phase D, in particular developing the next-generation of ATM platforms.

The evaluation of the 39 eligible proposals was concluded in December 2025 ([14]). The list of selected proposals was presented to the GB in December and approved by written procedure on 13 January 2026. Following the grant agreement preparation phase, the grants will be signed in Q2 2026.

1.2.3.3 Status of the EU-Rail – SESAR Synergy call (HORIZON-ER-JU-2023-FA1-SESAR)

In 2025, the Travel Wise project, a EUR 6.6 million project co-funded by the SESAR 3 JU and the Europe's Rail JU (EU-Rail), made significant progress in advancing intermodal travel through enhanced real-time information sharing, collaborative decision-making and improved airport rail connectivity. The 37-partner consortium, bringing together a broad range of transport and technology stakeholders, contributed balanced and operationally grounded input to the development of innovative multimodal solutions.

This project, issued from the first synergy call between the two JUs, further deepened cooperation, enabling valuable cross-domain insights and the exchange of best practices, including lump sum funding and the adoption of the SESAR 3 JU's programme management processes.

A key achievement in 2025 was the successful technical review conducted in April, which validated the project's refined concept and confirmed its alignment with strategic objectives and implementation planning. Preparations for demonstration activities in Paris, Amsterdam, Athens and Bologna progressed steadily, establishing a solid foundation for the next phase of Travel Wise in 2026.

1.2.3.4 SESAR Solutions delivery: release process in 2025

In 2025, release activities have been executed and monitored according to the release 15 plan endorsed by the Programme Committee (PC) in December 2024.

The original release 15 plan included 50 exit maturity gates corresponding to SESAR Solutions under the scope of ER1 and DSD1a projects, to be completed before the end of 2025. During 2025, the scope of the release 15 plan has evolved.

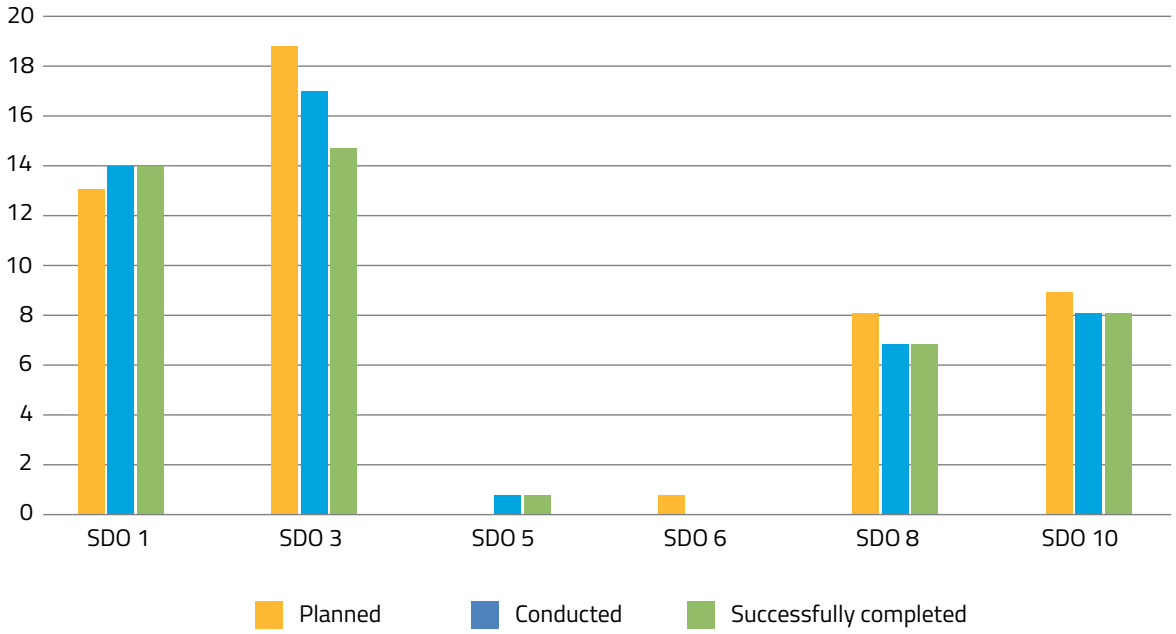
Firstly, following the assessment of HERON demonstrations, three SESAR Solutions initially proposed were eventually considered as contributions to two existing SESAR Solutions already delivered. Secondly, results from U-space demonstration projects (U-ELCOME, ÉALÚ-AER and BURDI) led to the merging of four solutions into a single consolidated solution (U-ELCOME 0311). In parallel, two new technological solutions emerging from ÉALÚ-AER reached TRL8 (ÉALÚ-AER 0552 and 0553), primarily to support U-space implementation, but also with potential to enhance ATM CNS.

Finally, as validation activities progressed, the target maturity levels of three solutions were adjusted to reflect actual progress: one was revised downward (AI4HyDrop 0448, from TRL2 to TRL1), while two exceeded expectations and achieved higher-than-planned maturity levels (AI4HyDrop 0451, from TRL2 to TRL4, and HERON 0357, from TRL6 to TRL8).

As a result, release 15 concluded with 47 exit maturity gates – 31 for ER1 and 16 for DSD1a – conducted across various TRL levels, as illustrated in Figure 5.

([14]) Details on the applicants and evaluation process of IR2 are provided in Sections 1.3.1 and 1.4.

FIGURE 5: **RELEASE 15 MATURITY GATES PLANNED, CONDUCTED AND SUCCESSFULLY COMPLETED**



The outcomes were very positive. Out of the 31 maturity gates conducted for ER1 projects, 14 have successfully completed TRL1, 14 have completed TRL2, and one has completed TRL4 (initially expected at TRL2). All of them have been considered good candidates to continue further development in future R & I activities. Only two solutions could not fully complete the expected TRL2 maturity, despite the positive work done and the promising results obtained, due to some validation, assessment and development activities remaining incomplete and requiring further work to fully mature the concepts.

All the projects under DSD1a (i.e. HERON, ECHOES, BURDI, U-ELCOME and ÉALÚ-AER) have successfully completed all their planned activities within the release 15 timeframe and have delivered eight new SESAR Solutions (at TRL6 or higher). In this context, seven standardisation and regulatory needs were identified, highlighting the need to adapt existing rules and standards to enable the deployment of these solutions.

In addition, the projects also successfully demonstrated seven already existing solutions in the SESAR catalogue to achieve TRL7 or TRL8. These projects supported the progress towards the completion of SDO2 (deployment actions 2.3, 2.5 and 2.6), SDO5 (deployment action 5.3) and SDO10 (deployment action 10.2).

These solutions have been added to the SESAR Solutions Catalogue and an overview of each solution is provided in Annex 11.

In addition, during the technical project review, which is based on a maturity self-assessment and not on formal exit maturity gates, six SESAR Solutions from projects under IR1 have reported an evolution of their current maturity level beyond their initial TRL, i.e. four from TRL1 to TRL2 and two from TRL2 to TRL4.

These achievements and this progress will feed into the 2025 strategic development and deployment monitoring reports that will be elaborated in 2026.

1.2.4 Strategic area of operation 4: facilitate an accelerated market uptake of SESAR Solutions

1.2.4.1 Activities carried out under the Connecting Europe Facility framework

Aiming at increasing the buy-in from the ATM community on the SESAR Solutions delivered by R & I, the DSD activities facilitate the deployment across Europe of a set of SESAR Solutions. DSDs are closely connected to the standardisation and regulatory framework, and provide a platform for a critical mass of early movers to accelerate market uptake, thus fostering the industrialisation process for SESAR Solutions and SDOs, and promoting their deployment in Europe.

Following the first four DSD calls, the SESAR 3 JU had planned to prepare the technical specifications based on the 2025 Master Plan, with the aim of including a DSD4 scope into a CEF call initially expected to be launched in the third quarter (Q3) of 2025. However, the CEF call has been postponed pending further clarification on both the scope and the funding envelope. Consequently, in 2025, the SESAR 3 JU has not provided the technical specifications and is awaiting a decision on the CEF call.

Status of the Connecting Europe Facility's Digital Sky Demonstrator 1a call (CEF-T-2021-SIMOBGEN)

Launched into execution at the end of 2022 for a three-year duration, the five projects (U-ELCOME, ECHOES, HERON, ÉALÚ-AER and BURDI) have completed their activities with the execution of the demonstration activities followed by the exit maturity gates. The projects have delivered 15 SESAR Solutions at TRL7 and TRL8 maturity levels. These solutions cover the U-space and urban air mobility, and the aviation green deal flagships, and are contributing to SDO2, SDO5 and SDO10. Details on these solutions are provided in Annex 11 and in the SESAR Solutions Catalogue.

Status of the Connecting Europe Facility's Digital Sky Demonstrator 1b call (CEF-T-2022-SIMOBGEN)

Due to exceptional circumstances, notably the high demand for air traffic controllers during the summer 2025 peak traffic period and exceptional software development issues, CINEA granted a six-month suspension of the EXODUS and DEVICE projects. These suspensions allowed for the

rescheduling of demonstration activities outside of peak traffic periods, ensuring adequate air traffic controller availability and a more robust validation process. Following the re-initiation of the two projects, the SESAR 3 JU, in coordination with CINEA, assessed their progress through dedicated project reviews. The demonstration activities' preparations progressed according to the revised planning, allowing the delivery of the planned solutions at the required quality and maturity levels.

In 2025, ESMA, the third DSD1b project, completed the preparations for its demonstration activities. The flight campaign is an important element of the ESMA project addressing the need to increase the level of automation in ATM. It demonstrated the operation of a multilink communication infrastructure using satcom Datalink alongside VHF Data Link (VDL) Mode 2. Since September 2025, five Transavia aircraft equipped with Iris Dual Link have flown on regular commercial routes to provide evidence on safety message prioritisation over satcom. In addition, flights between US and Europe have shown the compatibility of internet protocol suite (IPS)-equipped aircraft with open standards interconnection (OSI)-based ground systems (current datalink protocol). Initial consolidated results from both demonstrations were presented at ESMA's first dissemination event, hosted by Frequentis in Vienna from 24 to 25 November 2025. The project also continued its collaboration with AMEA (project under DSD3) as part of the ESMA follow-on activities.

Status of the Connecting Europe Facility's Digital Sky Demonstrator 2 call (CEF-T-2023-SIMOBGEN)

In 2025, PEACOCK, the only project funded under DSD2, continued advancing its work to improve departure predictability by strengthening coordination between regional airports and the Network Manager, thereby contributing to more efficient and environmentally sustainable ATM operations. The successful technical review in March 2025 confirmed that the project remains well aligned with its strategic objectives and is progressing as planned. The consortium also delivered its initial standardisation and regulatory outputs, representing an important step towards a broader adoption of the project's solutions. Operational validation progressed as well, with the first de-icing and taxiing exercises producing a more accurate duration estimation and leading to a refined off-block time estimation.

Status of the Connecting Europe Facility's Digital Sky Demonstrator 3 call (CEF-T-2024-SIMOBGEN)

Following the definition of the DSD technical specifications by the SESAR 3 JU, CINEA launched a EUR 2.5 billion CEF call in September 2024, containing provisions for a series of DSDs in the areas of automation, virtualisation and support for the aviation green deal. The topics defined with the call were aligned with the 10 SDOs as defined in the *European ATM Master Plan*. The SESAR 3 JU participated in the evaluation process in March 2025, which resulted in the selection of the AMEA project, launched in autumn 2025.

AMEA will build on ESMA demonstration (DSD1b) by further testing the integration of multiple communications technologies – such as satellite and terrestrial links – into aircraft and ground systems to improve resilience, efficiency and environmental performance in air traffic services. Specifically, the demonstrator will combine next-generation satellite communications (satcom) services with terrestrial systems such as VDL Mode 2 in a so-called ATN-OSI configuration, while also implementing a secure internet-based version of this network, known as ATN-IPS. Together, these upgrades are designed to boost performance, increase resilience and handle much higher data volumes than the current systems.

1.2.4.2 Towards the delivery of Common Project 2

During its June 2025 meeting, and in accordance with the 2024–2025 BAWP operational objective 2, the GB tasked the SESAR 3 JU with preparing a new common project (CP2) proposal to be submitted to the European Commission (DG Mobility and Transport) in 2026 for subsequent transposition into EU regulation.

The CP2 proposal aims to deliver a harmonised, service-based transformation of ATM with strong accountability and clear benefits for the network. It shall build on the SDOs defined in the 2025 Master Plan, which already reflect maturity, network performance potential, regulatory considerations and strong investor interest. Compared to previous common projects, the CP2 proposal aims to evolve from a pure 'technology mandate' to an ambitious and realistic performance-driven enabler of European network efficiency, climate ambition and industrial competitiveness. Its purpose is to identify which elements require strong EU-level coordination, while recognising that other SDOs elements may be more effectively implemented through alternative mechanisms such as local investment/deployment, European Union Aviation Safety Agency (EASA) rules or cooperative decision-making processes of the Network Manager.

To support the development of the proposal, a dedicated CP2 governance structure was established in 2025, comprising a Steering Group, a Proposal Development Team and six reference groups, bringing together more than 120 experts. The preparation of the CP2 proposal represents a significant coordination and analytical effort for the SESAR 3 JU, requiring the mobilisation of substantial internal resources and extensive engagement with stakeholders across the European ATM community.

The CP2 Steering Group, chaired by the SESAR 3 JU, was established in September 2025 to provide management direction and validate the key milestones throughout the process. The Proposal Development Team – composed of experts from the SESAR 3 SJU, the SESAR Deployment Manager (SDM) and EASA, and the reference groups chairs – is responsible for drafting the proposal and coordinating, analysing, reviewing and integrating the various inputs stemming from the Steering Group, the reference groups and the stakeholders' consultation. The reference groups, established under the coordination of the Proposal Development Team, are tasked with reviewing the content and providing technical insight in support of the development of the proposal.

All CP2 governance bodies were launched in September 2025. The work carried out during the remainder of the year focused on the initial stages of the development of the proposal. This work led to a first consolidated version of the proposal which included a targeted scope for CP2, subject to the completion of the cost-benefit assessment and final maturity outcomes planned for 2026.

The activities progressed in line with the agreed timeline. The next steps include the consolidation of the draft CP2 proposal, including the cost-benefit analysis, as a precondition for the stakeholder consultation campaign (approximately two months). Following this consultation phase and the final refinement of the proposal, the Steering Group is expected to endorse the final CP2 proposal for submission to the European Commission in the second half of 2026.

1.2.4.3 Coordination activities to accelerate the market uptake of SESAR Solutions

In 2025, the SESAR 3 JU ensured the acceleration of the market uptake of SESAR Solutions by coordinating activities with all relevant standardisation and regulatory bodies, in support of the implementation of the Master Plan and the modernisation of the ATM system. The key objective is to involve these stakeholders at an early stage in the development process of SESAR Solutions, so that certification, regulatory and standardisation requirements, which are essential for the industrialisation of new ATM technologies, are addressed sufficiently early and do not become a bottleneck for their timely deployment. In parallel, the SESAR 3 JU also contributed to strengthening the alignment between the Single European Sky (SES) instruments in order to support a coherent prioritisation of investments for ATM modernisation across Europe.

European Union Aviation Safety Agency

In 2025, EASA and the SESAR 3 JU continued to implement the activities agreed in the annual work programme under the service-level agreement (SLA) signed between the parties in 2021.

As part of this cooperation, EASA provided expert review of 47 deliverables of ongoing research and development (R & D) projects, including 20 related to regulatory aspects and 17 to standardisation.

For key pre-TRL6 solutions on trajectory-based operations (TBO) related to datalink operations (deployment action 5.2) and datalink infrastructure (SDO7), dedicated workshops involving SESAR JU and EASA experts were organised to ensure a common understanding of the standardisation and regulatory needs.

Dedicated technical exchanges between SESAR JU and EASA experts were held to review the standardisation and regulatory needs associated with already-delivered TRL6 solutions related to dynamic airspace configurations (SDO3, deployment action 3.1), virtual centre (SDO6, deployment action 6.1) and automation (SDO4, deployment action 4.1).

The SESAR 3 JU worked closely with EASA in support to the preparation of the CP2 proposal by involving the agency in the governance and technical work underpinning its development. This included EASA's participation in the CP2 Steering Group meetings and in the Proposal Development Team, where it provided technical regulatory expertise. EASA further contributed to the consolidation of the proposed performance and service requirements for the selected CP2 ATM functionalities, and to the analysis of regulatory and standardisation gaps associated with the solutions considered for inclusion in the proposal.

New service delivery model

A core component of the 2025 Master Plan and CP2 proposal is the transition to a new service delivery model, aiming at replacing the current model with a data-driven and cloud-based service-oriented architecture for all operational environments. This transition will enhance flexibility, scalability and resilience, and will accelerate innovation thanks to the service-oriented design, with open and standardised interfaces based on application programming interface technologies, corresponding to SDO8 of the Master Plan.

Following the signature in June 2024 of the joint statement of commitment by key European stakeholders to support this transition, the SESAR 3 JU set up a task force comprising ANSPs and industry representatives. The task force, co-chaired by the SESAR 3 JU, has delivered in 2025 the SESAR reference document setting out the minimum level of level 2 service decomposition for a typical area control centre in Europe ([15]),

([15]) The document is available on the SESAR 3 JU website.

necessary to fulfil the ambition of SDO8 as defined in the Master Plan and jointly agreed by ANSPs and the ground systems manufacturing industry. A separate companion document outlined supporting harmonisation principles to be considered in the development of the joint SESAR–EASA roadmap; these were presented to the GB for reflection, recognising that discussions on this topic are still ongoing.

Joint SESAR–EASA roadmap on SDO8

In June 2025, EASA and the SESAR 3 JU initiated a coordination process to develop a first version of a regulatory and standardisation roadmap supporting the deployment of the service-oriented architecture (SOA) and cloud-based new service delivery model. The objective of this roadmap is to establish a shared view on the readiness of the certification framework to support a risk-based, service-oriented model for digital platform operators, air traffic service providers and ATM data service providers. This includes identifying the key regulatory enablers and milestones required for technical harmonisation and interface standardisation. Based on a common understanding of the readiness levels of the ground manufacturing industry and ANSPs, gaps and challenges were identified and translated into industry harmonisation and regulation recommendations for EASA to take into account when developing the roadmap. In this context, several underpinning concepts, related to service interoperability, interchangeability, portability and extendibility, and the notion of a common European platform envelope, were further elaborated and agreed with industry. Finalising the joint SESAR–EASA implementation roadmap on SDO8 by the end of 2025 was not possible.

SESAR 3 JU participation in the SOA@ATM

Since early 2025, the SESAR 3 JU has participated in the EASA task force on SOA@ATM, established to support EASA in enabling open architecture, shared computing resources, networks and interfaces for ATM/ANS functional systems and equipment, in particular for those subject to certification, a declaration or a statement of compliance. As such, it intends to provide a holistic view of all regulatory and technical domains affected by the implementation of open platforms and SOA. It also provides expert advice on subsequent standardisation and rulemaking needs required to support the implementation of SOA into an ATM/ANS context, and provides expert advice on the further development and alignment of technical requirements, including related means of compliance, between detailed specifications and Commission Implementing Regulation (EU) 2017/373 ([16]).

Collaboration with standardisation bodies

In 2025, the SESAR 3 JU continued its collaboration with European standardisation bodies such as the European Organisation for Civil Aviation Equipment (EUROCAE), the European Air Traffic Management Standards Coordination Group, the European Unmanned Aerial System Standards Coordination Group and the European Cybersecurity Standards Coordination Group, both with direct attendance at group meetings and through the Technical Coordination Group (TCG) ([17]). This collaboration aimed at enhancing alignment between the standardisation needs identified during the implementation of the projects developing the SESAR Solutions and the ongoing standardisation activities conducted by the various standards development organisations. Monitoring and securing the timely delivery of the standards required to facilitate the implementation of the SESAR Solutions greatly contributes to accelerating their market uptake.

In the second half of the year, the SESAR 3 JU informed the above-mentioned bodies regularly on the progress in the development of the CP2 proposal, regarding both the overall process and the standardisation needs associated with the industrialisation plan annexed to the proposal.

With regard to EUROCAE, the SESAR 3 JU participated actively in both the EUROCAE Council and the Technical Advisory Committee. Through this engagement, the SESAR 3 JU contributed to the definition of the strategic planning and monitoring of standardisation activities needed to deliver the vision outlined in the Master Plan. It also participated in key working groups, including WG-105 on Unmanned Aircraft Systems, WG-122 on Virtual Centre and WG-130 on ATM/ANS Supporting Standards.

([16]) Commission Implementing Regulation (EU) 2017/373 of 1 March 2017 laying down common requirements for providers of air traffic management/air navigation services and other air traffic management network functions and their oversight, repealing Regulation (EC) No 482/2008, Implementing Regulations (EU) No 1034/2011, (EU) No 1035/2011 and (EU) 2016/1377 and amending Regulation (EU) No 677/2011 (OJ L 62, 8.3.2017, p. 1, ELI: http://data.europa.eu/eli/reg_impl/2017/373/oj).

([17]) Details on the TCG are provided in this section under the subheading 'Technical Coordination Group'.

Specifically for the standards coordination groups, the SESAR 3 JU worked closely with the chairs and secretariats of each group to align the structure of their respective rolling development plans and improve the traceability between these plans and the reference to the 2025 Master Plan.

Technical Coordination Group

The TCG was established in December 2022 by the SESAR 3 JU to boost cooperation with the main entities that contribute at the European level to the SESAR project, including EASA, the European Defence Agency (EDA), EUROCAE, EUROCONTROL (including the Network Manager) and the SDM. Specifically, the TCG was tasked with monitoring and de-risking the roll-out of the SDOs and facilitating the accelerated market uptake of SESAR Solutions.

In 2025, in line with the agreed work plan, the TCG members held several meetings to define (or in some cases to refine) the set of data to be included in the *Strategic Deployment Monitoring Report 2025*. The exchanges helped improve the quality and consistency of the information provided and the overall quality of the final report.

The group also discussed the ATC-ATC TBO interoperability report prepared by the SDM, which reported that the on-line data interchange (OLDI) is the consensus technology for the exchange of flight trajectory data across air traffic service provider borders in Europe. The SESAR 3 JU presented a complementary analysis on the trajectory exchange needs linked to SDO5 solutions that are not yet at TRL6. The group concluded that OLDI was sufficient to cover all ATC-ATC communication needs to realise the deployment of the SDO.

CP1 ATM functionality 6 Industrialisation Forum

In 2025, the SESAR 3 JU actively contributed to the CP1 Industrialisation Forum. The Forum, chaired by EASA, brought together all relevant industry and operator stakeholders involved in the implementation of ATM functionality (AF) 6 'initial trajectory information sharing' (in compliance with the AF6 industrialisation gate required by the CP1 regulation). AF6 is of particular importance as it is associated with the transition to TBO (SDO5). After the successful technical maturity gate in 2024, the focus of the forum's activities in 2025 was on facilitating the dialogue between the stakeholders and the regulator concerning the technical details of the implementation and applicable sections of the datalink Air Traffic Service Baseline 2 standards.

Alignment of the Single European Sky instruments (Master Plan and performance plans)

In 2025, the SESAR 3 JU continued to support the alignment between the 2025 Master Plan and the SES performance framework, in close cooperation with the Performance Review Body and DG Mobility and Transport. Activities focused on ensuring consistency between the investments identified in the Master Plan and those planned under the SES performance and charging scheme, in particular in the context of RP4 implementation and the preparations for RP5.

In this context, the SESAR 3 JU contributed to activities aimed at strengthening the link between the SDOs and investment planning in national performance plans. These activities fed into the *Strategic Deployment Monitoring Report 2025*, supporting more consistent monitoring of investments and reporting on the implementation of ATM modernisation priorities across Europe.

Network Manager

In 2025, the SESAR 3 JU contributed to the regular update of the network operations plan to support the integration of the relevant SDOs of the Master Plan.

The SESAR 3 JU supported the activities of the Network Management Board's (NMB) Network Directors of Technology (NDTECH) Working Group, including its joint work with the Network Directors of Operations (NDOP) Working Group. In 2025, the SESAR 3 JU reported on the progress of the new service delivery model (SDO8), in connection with the open digital architecture initiative, which is part of the NDTECH programme and is one of the three top priorities defined by the NMB for the European network. As an observer to the NMB, the SESAR 3 JU provided regular updates on SDO8, in close cooperation with the SDM, EASA and EUROCAE.

At the joint NDTECH/NDOP level, the SESAR 3 JU also presented its approach to the development of the CP2 proposal, together with the associated timeline. It highlighted the upcoming period of open stakeholder consultation during which the NDTECH and NDOP members will be invited to provide comments.

1.2.5 Strategic area of operation 5: deliver SESAR outreach

1.2.5.1 Synergies

In 2025, the SESAR 3 JU continued to work closely with CINEA, notably on the implementation of the DSD projects funded under the CEF, as detailed in Section 1.2.4.1. In addition, the Travel Wise project selected through the joint call with the EU-Rail JU provided an opportunity to share best practices in project and grant management while further strengthening collaboration between the two JUs.

In addition, aligning with the 2024–2025 BAWP operational objective 6 to foster synergies in high-priority areas related to its mission, the SESAR 3 JU has carried out dedicated activities with the Clean Aviation JU and has engaged with relevant counterparts in relation to space-based technologies and innovation. The SESAR 3 JU has also pursued synergies with national and regional programmes via new cooperative arrangements with two regions in Europe.

Clean Aviation JU

The SESAR 3 JU collaborated with the Clean Aviation JU and all relevant European aviation stakeholders on the preparation of ARIS. The strategy proposed a bold new vision to build the world's most competitive, safe and sustainable aviation ecosystem, supporting Europe's security and sovereignty. It covers the full aviation ecosystem, defines R & I requirements and funding needs across the entire innovation pipeline and is fully aligned with the 2025 *European ATM Master Plan* ([18]). The SESAR 3 JU continued to work closely with the Clean Aviation JU during the second half of the year on the promotion of ARIS to relevant policymakers and stakeholders.

Space-based technologies and innovation

Space-based technologies and innovation have an essential role to play in aviation, particularly in complementing terrestrial solutions in the fields of communication and surveillance. In view of this, the SESAR 3 JU has established cooperation with EUSPA through the MoC signed in 2024. During 2025, the SESAR 3 JU also discussed with the European Space Agency (ESA) ways to reinforce cooperation and ensure complementarity between their respective programmes. It was agreed to develop a new MoC between the two organisations, to be signed in 2026, with the aim of supporting coordinated planning and implementation, and the shared assessment of progress and results achieved by their respective R & D and related activities.

In addition, the SESAR 3 JU participated in the Joint IRIS² Task Force established by DG Mobility and Transport and DG Defence Industry and Space in October 2025, aimed at developing mission and performance requirements for IRIS² (infrastructure for resilience, interconnectivity and security by satellite), which offers the opportunity to provide European space-based air–ground connectivity services to support ATM applications.

Synergies with national and regional programmes

Article 20 of the SBA provides that the JUs should establish dialogue with Member States, particularly in the content of synergies, 'to ensure the alignment of efforts and activities at national, regional, Union and European level to create more impact' (recital 32 of the SBA). As explained in Section 3.4, due to limited availability of information, a formal plan to capture synergies with national programmes, which was envisaged under operational objective 6 of the 2024–2025 BAWP, was not developed.

At the regional level, in 2025 the SESAR 3 JU did conclude, for the first time, MoCs with two regions, Campania and Galicia. These MoCs establish strategic frameworks to identify and activate synergies between the SESAR 3 JU's

([18]) On ARIS, see Section 1.2.1.1.

work programme and the two regions' innovation strategies. Cooperation will focus on three main areas: developing a joint technical roadmap to align research and innovation priorities; identifying additional funding sources at the European, national and regional levels; and engaging local stakeholders – including small and medium-sized enterprises (SMEs) and academia – to boost participation in SESAR activities.

1.2.5.2 Stakeholder engagement

1.2.5.2.1 Institutional stakeholders

European Defence Agency

Operational military air traffic serves various purposes, including security and defence, sovereignty missions, and training, and often requires immediate and unpredictable access to airspace. This unpredictability necessitates flexible ATM, to ensure that military operations do not adversely affect the overall flow of air traffic. Therefore, the extensive involvement of the military in SESAR activities is critical.

In close dialogue with the SESAR 3 JU since 2011, the EDA is the main interface between the DES programme, on the one hand, and military aviation and ATM, on the other. It is responsible for coordinating military views with regard to SESAR.

During 2025, cooperation continued under the MoC between the SESAR 3 JU and the EDA to enhance coordination during the execution of the DES programme, in line with the civil-military roadmap of the Master Plan ([19]). The joint task force established in 2023 to support the EU action plan on synergies between civil, defence and space industries ([20]) and ensure complementarity between the work programmes of the SESAR 3 JU and the European Defence Fund continued its work. In 2025, the task force focused on specific projects where effective collaboration could fill gaps or prevent duplication, and explored opportunities for dual-use developments.

The SESAR 3 JU and the EDA also continued to harmonise their remotely piloted aircraft system (RPAS) ([21]) research programmes to reduce duplication and to promote dual-use solutions. The SESAR 3 JU participated in reviews, discussions and events relating to the EDA's RPAS activities, and the EDA reciprocated in the SESAR ER and IR projects. The EDA continues to contribute output from this harmonised work to European joint civil and military solutions, particularly through support to standardisation. This cooperation supports a harmonised approach to RPAS standardisation and operational integration. During 2025, the SESAR 3 JU also contributed to the preparation of the Military Mobility Package being developed jointly by the European Commission and the EDA.

1.2.5.2.2 Industry stakeholders

SESAR Deployment Manager

The SESAR 3 JU continued its close collaboration with the SDM, pursuant to the MoC between the two organisations, working to ensure coherence between their respective strategies and programmes and the necessary connections between SESAR research, development,

([19]) *European ATM Master Plan – 2025 edition*, pp. 72–73.
([20]) Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions – Action Plan on synergies between civil, defence and space industries, COM(2021) 70 final of 22 February 2021, https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A52021DC0070&qid=1777532772915.
([21]) A remotely piloted aircraft (RPA) is a specific type of unmanned aircraft which is remotely operated by a pilot in a control station. Managing RPA traffic is challenging for controllers, since RPA fly significantly slower than conventional jet airliners and may experience communication latency or even a loss of the communication link with the ground.

innovation and validation activities and the deployment of SESAR Solutions. Cooperation took place in the framework of various groups and associated activities, including in the context of Master Plan implementation, notably the preparation of the CP2 proposal, the Technical Coordination Group, the communications, navigation and surveillance (CNS) Programme Manager (covering all aspects of CNS roadmap implementation), and the European Air Traffic Management Standards Coordination Group, where the SDM is involved in coordination on standards. The two organisations also worked together in relation to communications around SESAR success stories, including the 'SESAR Delivers' social media campaign, and joint visits by SESAR 3 JU and SDM management.

Alliance for Zero-Emission Aviation

The SESAR 3 JU continued its active participation in the Alliance for Zero-Emission Aviation, which is aimed at preparing the aviation ecosystem for the entry-into-service of novel electric and hydrogen-powered aircraft, and specifically in its Working Group 5, which addresses the challenge of integrating the new zero-emissions aircraft into the European airspace. In 2025, the SESAR 3 JU contributed in particular to the development of the airspace integration aspects of the Alliance for Zero-Emission Aviation's roadmap.

Air navigation service providers

The SESAR 3 JU maintained close contact with the Civil Air Navigation Services Organisation (CANSO) during 2025. The SESAR 3 JU participated actively in CANSO's Airspace World event in Lisbon in May 2025 through the organisation of a number of SESAR walking tours and participation in theatre sessions, and participated also in its Airspace Asia Pacific event in Hong Kong in December 2025. The SESAR 3 JU also contributed to CANSO's Complete Air Traffic System (CATS) initiative, which involves over 60 organisations worldwide. This included participation in meetings of the CATS Global Council, in May and November, culminating in the adoption of a CATS work programme for 2026–2028.

Civil airspace users and professional staff organisations

The SESAR 3 JU maintained close relationships during 2025 with the civil airspace users (AUs) and professional staff organisations (PSOs).

The contractual arrangements governing this relationship consist of framework contracts for each individual AU and PSO, complemented by specific contracts detailing their respective activities. Under those, AUs and PSOs can provide SESAR 3 JU with their assessments and opinions on any SESAR-related topic, and in particular on DES programme activities.

Through these framework contracts, the SESAR 3 JU engaged on the AUs side with the International Air Transport Association (IATA) and with the European Business Aviation Association (EBAA) , and on the PSOs side with the Air Traffic Controllers European Unions Coordination (ATCEUC); the European Cockpit Association; the European Transport Workers' Federation (ETF); International Federation of Air Traffic Controllers' Associations (IFATCA); and the International Federation of Air Traffic Safety Electronics Associations (IFATSEA).

In 2025, efforts focused in particular on the following domains of activity.

- The review of deliverables of a significant number of SESAR projects, and the participation in validation exercises and in the advisory boards of many of these projects.
- Participation in the development of the CP2 proposal.
- The dissemination of SESAR knowledge among the stakeholders in their respective areas of activity.
- The assessment of features with relevance to the future of air navigation, such as advanced automation, AI or non-CO_2 environmental aspects, and their impact on safety, financial sustainability, future job descriptions or just culture.

European airports

Recognising the need for further airport integration, the SESAR 3 JU works closely with Airports Council International (ACI) Europe to raise awareness of SESAR activities beyond the airports represented in the JU's membership.

In 2025, this collaboration was continued with the second specific contract implementing the framework contract for the period between 2024 and 2027. Under this specific contract, ACI Europe supported the SESAR 3 JU in a number of communication activities, including in the production of animations, articles and video interviews to promote SESAR R & I activities to decision-makers and the general public.

The Executive Director of the SESAR 3 JU participated in the ACI Europe Annual Congress and General Assembly from 18 to 20 June in Athens, where he presented the Digital Transformation Award to Munich Airport, a SESAR member, recognising a European airport that has embraced digitalisation and adopted innovative technologies and procedures to improve safety, capacity, efficiency and sustainability.

SESAR 3 JU programme managers participated in ACI Europe's Technical, Operations and Safety Committee (TOSC) in April and Environmental Strategy Committee (ENVSTRAT) in June to promote the ATM Master Plan and SESAR R & I work. The participation in the ENVSTRAT meeting also enabled discussion with airport members on the joint study *Bridging Multimodal Gaps: Solutions for improving passenger experience and securing on-time arrivals.*

New entrants

The SESAR 3 JU's membership includes a number of organisations dedicated to the full range of new entrants, such as drones, air taxis and high-altitude vehicles, along with organisations working on their evolving management systems, such as U-space and higher airspace operations (HAO). The SESAR 3 JU is also actively involved in the Network of U-space Stakeholders, a large and active forum dedicated to the sharing of information relevant to U-space deployment. The SESAR 3 JU co-chairs this network with the European Commission, EASA, EUROCONTROL and the EDA. The SESAR 3 JU also continues to contribute to this field through participation in the European Commission's Informal Drone Expert Group and the European U-space Standardisation Coordination Group.

In October 2025, the SESAR 3 JU organised a two-day event highlighting the achievements of three U-space DSD projects: U-ELCOME, BURDI and ÉALÚ-AER. The event brought together leading drone and aviation stakeholders from across Europe to share operational insights, showcase project outcomes and discuss the next steps in U-space implementation. The U-ELCOME project also published a *U-space Implementation Handbook*, a practical guide for current and future implementers.

The SESAR 3 JU actively participated in international activities related to new entrants, in particular through a broad portfolio of drone and innovative air mobility (IAM) research projects, three of which directly support the deployment of the Commission's U-space regulations ([22]), and the ECHO 2 project, which focuses on HAO. It also continued to support the ICAO, providing a co-rapporteur to ICAO's guidance development working group within the ICAO Advanced Air Mobility (AAM) Study Group.

Research associations

In 2025, the SESAR 3 JU followed the activities of the Advisory Council for Aviation Research and Innovation in Europe (ACARE) at the level of the general assembly. Following a pause in its activities during 2024 and 2025, the chair team proposed a new approach and organisational structure for ACARE which was endorsed at the general assembly at the end of 2025.

The SESAR 3 JU also supported the European Aeronautics Science Network (EASN) through events of shared interest, notably the 15th EASN International Conference in Madrid in October, to profile ATM in the wider field of aeronautics. It has also continued to coordinate regularly with the Association of Scientific Development of ATM in Europe (ASDA) by providing relevant briefings and presentations at their board meetings.

1.2.5.3 Cooperation with non-EU countries and international organisations

The SESAR 3 JU's strategy for cooperation with non-EU countries and international organisations is pursued within the framework of the EU's external aviation policy. In close coordination with the European Commission, the SESAR 3 JU aims to secure Europe's position as a global leader in ATM modernisation in support of the ICAO GANP, promoting SESAR Solutions for global interoperability and harmonisation, and thereby supporting EU industrial leadership and competitiveness.

In addition, following the successful expansion of membership in 2024 to include NATS from the United Kingdom, the SESAR 3 JU launched in December 2025 a further call for associated members, notably targeting non-EU countries associated with Horizon Europe. It is expected that the results of the call will be announced in June 2026.

Activities at ICAO level

During 2025, the SESAR 3 JU participated actively in the preparation of European working papers and coordination of European positions for the 42nd ICAO Assembly that took place in September/October. In particular, the SESAR 3 JU co-led the preparation of a working paper on accelerating innovation in ATM service provision, which is closely linked to the new service delivery model in the 2025 Master Plan. The paper received broad support at the assembly and was reflected in the Assembly Resolution on the GANP.

Between 2024 and 2025, the SESAR 3 JU worked to ensure alignment between the update of the 8th edition of the GANP and the 2025 Master Plan, in line with operational objective 9 of the 2024–2025 BAWP. The assembly endorsed the new edition of the GANP, which reflects a high degree of convergence with the Master Plan and the European strategic framework.

During the assembly, the SESAR 3 JU supported the European Commission in a number of bilateral

([22]) EU U-space regulatory framework: Commission Implementing Regulation (EU) 2021/664 of 22 April 2021 on a regulatory framework for the U-space (OJ L 139, 23.4.2021, p. 161, ELI: http://data.europa.eu/eli/reg_impl/2021/664/oj); Commission Implementing Regulation (EU) 2021/665 of 22 April 2021 amending Implementing Regulation (EU) 2017/373 as regards requirements for providers of air traffic management/air navigation services and other air traffic management network functions in the U-space airspace designated in controlled airspace (OJ L 139, 23.4.2021, p. 184, ELI: http://data.europa.eu/eli/reg_impl/2021/665/oj); and Commission Implementing Regulation (EU) 2021/666 of 22 April 2021 amending Regulation (EU) No 923/2012 as regards requirements for manned aviation operating in U-space airspace (OJ L 139, 23.4.2021, p. 187, ELI: http://data.europa.eu/eli/reg_impl/2021/666/oj).

meetings with non-EU countries, including China, India, Singapore, South Korea and the United States.

Throughout the year, the SESAR 3 JU maintained its active participation in a number of key ICAO expert groups. It co-chaired the ICAO GANP Study Group, which finalised the 8th edition of the GANP for endorsement at the 42nd ICAO Assembly in 2025, and subsequently started planning the work programme for the next update, which will include the development of a minimum implementation path necessary for the evolution of the global air navigation system.

The SESAR 3 JU continued to participate actively in ICAO's AAM Study Group, which supports ICAO's standardisation of global AAM. This included co-leading the sub-group charged with developing guidance material on uncrewed aircraft system traffic management (UTM) / U-space.

It also participated in the ICAO Air Traffic Management Requirements and Performance Panel, in particular to provide inputs on its R & D work related to TBO, HAO and the *Global Air Traffic Management Operational Concept*.

Other international activities

The SESAR 3 JU maintained contact with the United States Federal Aviation Administration during 2025, pursuant to the MoC between the EU and the United States on ATM modernisation, civil aviation R & D and global interoperability, which establishes cooperation in four areas: the integration of new entrants, the development of performance-based technologies, advancing innovation in ATM, and ICAO coordination. It also included discussions related to the new service delivery model and its associated regulatory aspects.

Bilateral engagement with other key international partners were also maintained during 2025. Regular exchanges took place with the Civil Aviation Authority of Singapore under the MoC signed in 2012, in particular to explore potential opportunities for closer collaboration in the area of TBO, on which Singapore is participating with a number of Asia–Pacific countries through the TBO Pathfinder project. The SESAR 3 JU held bilateral discussions with NAV Canada to exchange views on respective strategic priorities, including the development and deployment priorities of the Master Plan. In addition, regular technical-level exchanges continued with experts from both Japan and South Korea on respective R & I activities relating to drones and IAM.

The SESAR 3 JU also maintained close contact with EASA to explore opportunities to promote SESAR Solutions via the aviation partnership projects it manages on behalf of the EU with a number of regions, such as North Asia, South Asia, South-East Asia, and Latin America and the Caribbean. This included discussions on the preparation of the work plans of these projects, some of which were renewed during 2025.

1.3 Calls for proposals, grant information and other funded actions (calls for tender, prizes, etc.)

1.3.1 Calls for proposals and grant information

In 2025, the SESAR 3 JU contractually managed 68 grants awarded under the Horizon Europe programme:

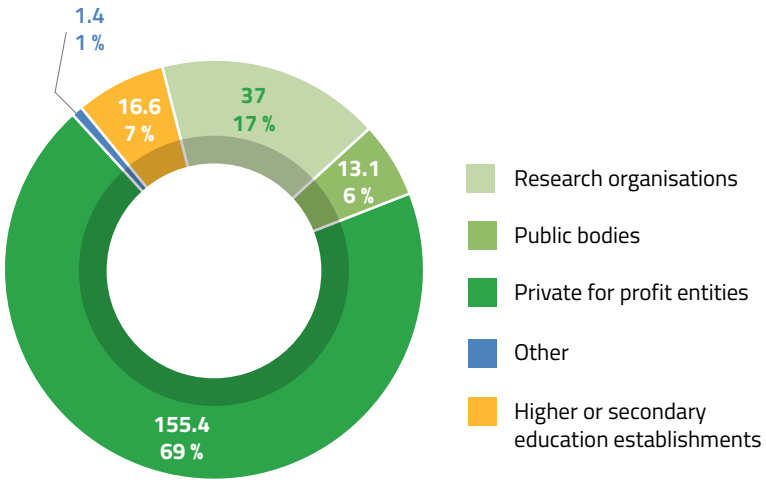
- 18 grants under the ER1 call for a total cost of EUR 24.7 million, including an EU contribution of EUR 22.3 million; five projects funded under these grants were closed during the fourth quarter of 2025;
- 32 grants under the IR1 call for a total cost of EUR 347.3 million, including an EU contribution of EUR 180.6 million; and
- 18 grants under the ER2 call for a total cost of EUR 27.7 million, including an EU contribution of EUR 25.6 million.

All these grants were managed in accordance with the Horizon Europe programme rules.

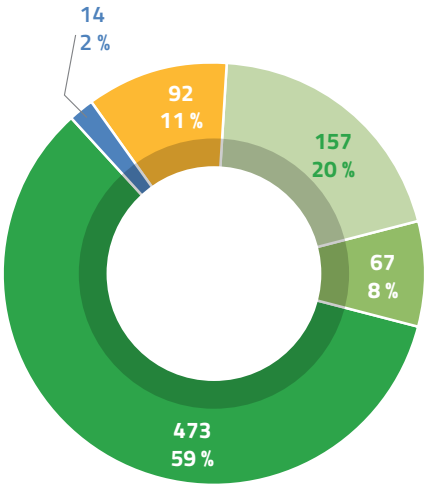
Figure 6 shows organisations' share of participation and the amount of EU funding received by organisations in the 63 grants managed by the SESAR 3 JU on 31 December 2025, which represented EUR 223.5 million in EU funding and a total investment of EUR 394.1 million. The participation in the DSD projects and the synergy project with the EU-Rail JU are not included.

FIGURE 6: **FUNDING AND PARTICIPATION FIGURES FOR EACH TYPE OF ORGANISATION**

Net EU funding received (in million EUR) by each type of organisation



Number and share of participations by type of organisation



Of the 803 participations, 119 are from SMEs, representing 14.8 % of the total. These SMEs received EUR 27.8 million in EU funding, accounting for 12.4 % of the total funding.

ER3 and IR2 calls for proposals

In 2025, the SESAR 3 JU launched the third wave of DES calls, which included ER3 and IR2. The calls were published on 15 January 2025, opened for submission on 1 April 2025 and closed on 16 September 2025.

The ER3 call (HORIZON-SESAR-2025-DES-ER-03) resulted in 82 proposals submitted, with one proposal declared ineligible. The total EU budget requested by eligible proposals was EUR 111.3 million for a call budget of EUR 24 million, resulting in an oversubscription rate of around 4.6.

Tables 2 and 3 provide an overview of the distribution of eligible ER3 proposals by work area (WA) and the breakdown of applicants by country and participant type.

TABLE 2: **ELIGIBLE PROPOSALS SUBMITTED TO THE DES-ER-03 CALL**

Work area	No of proposals submitted
WA1-1 ATM impact on climate change	12
WA1-2 Digital flight rules	1
WA1-3 Investigate quantum sensing and computing applied to ATM	19
WA1-4 Fundamental research for other topics	17
WA2-1 Research to help shape the future regulatory framework for a DES	23
WA2-2 Integration of the next generation aircraft for zero-/low-emission aviation	10
Total	**82**

TABLE 3: **BREAKDOWN OF APPLICANTS IN THE DES-ER-03 CALL, BY TYPE OF ENTITY AND COUNTRY**

Country	Higher education institutions	Private for-profit companies	Public bodies	Research organisations	Other	Total
Austria	2	6		2		**10**
Belgium	2	8		8	1	**19**
Bulgaria	1					**1**
Canada	1	2			6	**9**
Croatia	2	1				**3**
Cyprus	1	4				**5**
Czechia	5	13		2		**20**
Denmark	1	1				**2**
Estonia		4				**4**
Finland	1			4		**5**
France	10	21		8		**39**
Germany	19	12	1	30	1	**64**
Greece	2	3	1	2	1	**9**
Hungary	1	2				**3**
Iceland		3				**3**
Ireland		9				**9**
Israel		1				**1**
Italy	19	45	1	20		**85**
Latvia	1		1			**2**
Malta		1				**1**
Netherlands	17	6	1	7		**31**
Norway	1			3	1	**5**
Poland	2					**2**
Portugal		2		1		**3**
Romania		3		2		**5**
Slovakia		1				**1**
Slovenia		1				**1**
Spain	29	28	5	20		**82**
Sweden	11		7			**18**
Switzerland	4	2		2		**8**
Türkiye	3	4			1	**8**
Ukraine		2				**2**
United Kingdom	19	15	1		1	**36**
United States					1	**1**
Total	**154**	**200**	**18**	**111**	**13**	**496**

The IR2 call (HORIZON-SESAR-2025-DES-IR-02) resulted in 39 proposals submitted, all eligible. The total EU budget requested by eligible proposals was EUR 314.7 million for a call budget of EUR 230 million, resulting in an oversubscription rate of around 1.4.

Tables 4 and 5 below provide an overview of the distribution of eligible IR2 proposals by work area and the breakdown of applicants by country and participant type.

TABLE 4: ELIGIBLE PROPOSALS SUBMITTED TO THE DES-IR-02 CALL

Work area	No of proposals submitted
WA1-1 Transformation to trajectory-based operations	2
WA2-1 Transition towards high performance of air–ground connectivity (multilink)	2
WA3-1 Next generation ATS platforms for en-route and TMA operations	5
WA3-2 Enhanced CNS capabilities	5
WA4-1 Next generation ATS platform for airport operations	2
WA4-2 Smart airports, airports as multimodal nodes and passenger experience	2
WA5-1 Increased automation assistance for the pilot for ATM tasks	3
WA5-2 Highly automated ATM for all airspace users	3
WA5-3 Airborne capabilities for supporting reducing ATM environmental footprint	3
WA6-1 Fast-track U3 U-space advanced services and CNS capabilities	4
WA6-2 Fast-track extending U-space eco-system	4
WA6-3 Fast-track enabling innovative air mobility (IAM) / vertical take-off and landing capable aircraft (VCA) (crewed and uncrewed) operations	2
WA7-1 Support to programme execution framework on performance	1
WA7-2 Support to programme execution on SESAR architecture and on strategic deployment planning and monitoring	1
Total	**39**

TABLE 5: BREAKDOWN OF APPLICANTS IN THE DES-IR-02 CALL, BY TYPE OF ENTITY AND COUNTRY

Country	Higher education institutions	Private for-profit companies	Public bodies	Research organisations	Other	Total
Austria	1	21				**22**
Belgium	1	22		28	3	**54**
Brazil		1				**1**
Bulgaria		3				**3**
Canada		2			7	**9**
Croatia		4				**4**
Czechia	3	23				**26**
Denmark		9				**9**
Estonia		1	2			**3**
Finland		3	1	5		**9**
France	4	81	10	5	2	**102**
Germany	3	54	1	24		**82**
Greece		4			1	**5**
Hungary	1	12				**13**
Iceland		6				**6**
Indonesia			1			**1**
Ireland		20				**20**

Country	Higher education institutions	Private for-profit companies	Public bodies	Research organisations	Other	Total
Italy	5	76	1	13		**95**
Latvia		1				**1**
Lithuania		6				**6**
Luxembourg		1			1	**2**
Netherlands	1	6	1	12		**20**
Norway		8		3		**11**
Poland		5		7		**12**
Portugal	1	3				**4**
Romania		2	2			**4**
Slovakia		5				**5**
Slovenia		1				**1**
South Korea	1					**1**
Spain	10	62	21	18	1	**112**
Sweden	3	11	12			**26**
Switzerland	2	19		2		**23**
Türkiye	1	4		1		**6**
Ukraine		2				**2**
United Kingdom	3	29	2	2		**36**
United States		1			2	**3**
Total	**40**	**508**	**54**	**120**	**17**	**739**

1.3.2 Operational procurement and prize activities

In 2025, the SESAR 3 JU implemented its operational procurement activities in line with its 2024–2025 BAWP and applicable financial rules, ensuring the provision of specialised expertise required for the execution of the DES. The SESAR 3 JU primarily relied on existing framework contracts, which enabled the efficient award of specific contracts and amendments while ensuring continuity of stakeholder involvement.

During the reporting period, specific contracts were concluded with PSO and AU organisations, providing operational and technical expertise supporting the implementation of the programme. The SESAR 3 JU also procured consultancy services contributing to strategic management and market uptake activities under established framework contracts, complemented by limited low-value procedures where appropriate.

It should be noted that, to maintain continuity of service, the Executive Director authorised two minor deviations ([23]). In Q3, a specific contract was signed with the five PSOs. The contract will run for two years, resulting in a minor budgetary increase of EUR 31 000 (in addition to an initial budget of EUR 330 000). Also in Q3, a specific contract not envisaged in the 2024–2025 BAWP was signed for EUR 92 500. This early commitment ensured that the JU could secure a suitable location in Cork for the SESAR Innovation Days 2026. Any delay would have risked the availability of the venue in the context of increased demand driven by Ireland's EU Presidency in 2026.

A new SESAR Young Scientist Award contest was organised in 2025, contributing to the promotion of innovation and research excellence within the SESAR community.

The total value of operational procurement and prize activities amounted to EUR 1 972 942 in 2025.

([23]) This information was presented to the GB at the December meeting.

TABLE 6: OPERATIONAL PROCUREMENT AND PRIZE FOR 2025

Subject	Type of contract	Contractor	Procurement procedure (if applicable)	Signature date	Amount (EUR)
Provision of PSO expertise to the DES programme	Specific contract	ETF	Framework contract	6 January 2025	49,750
Provision of PSO expertise to the DES programme	Specific contract	IFATCA	Framework contract	6 January 2025	49,300
Provision of PSO expertise to the DES programme	Specific contract	ATCEUC	Framework contract	6 January 2025	50,000
Provision of PSO expertise to the DES programme	Specific contract	European Cockpit Association	Framework contract	22 January 2025	49,300
Provision of PSO expertise to the DES programme	Amendment	ETF	Specific contract	10 June 2025	10,000
Provision of PSO expertise to the DES programme	Amendment	European Cockpit Association	Specific contract	12 June 2025	10,000
Provision of PSO expertise to the DES programme	Amendment	IFATSEA	Specific contract	12 June 2025	15,000
Provision of PSO expertise to the DES programme	Amendment	ATCEUC	Specific contract	10 June 2025	15,000
Provision of PSO expertise to the DES programme	Amendment	IFATCA	Specific contract	17 June 2025	24,050
Provision of PSO expertise to the DES programme	Specific contract	European Cockpit Association	Framework contract	7 October 2025	75,000
Provision of PSO expertise to the DES programme	Specific contract	IFATSEA	Framework contract	7 October 2025	35,000
Provision of PSO expertise to the DES programme	Specific contract	ETF	Framework contract	9 October 2025	74,700
Provision of PSO expertise to the DES programme	Specific contract	IFATCA	Framework contract	9 October 2025	26,500
Provision of PSO expertise to the DES programme	Specific contract	ATCEUC	Framework contract	9 October 2025	75,000
Provision of airports' expertise for the execution of the SESAR programme	Specific contract	European Region of the Airports Council International (ACI Europe)	Framework contract	22 January 2025	270,500
Provision of consultancy and support to SESAR JU – strategic management and facilitation of market uptake	Specific contract	Egis Avia SAS	Framework contract	28 March 2025	224,420

Subject	Type of contract	Contractor	Procurement procedure (if applicable)	Signature date	Amount (EUR)
Provision of consultancy and support to SESAR JU – strategic management and facilitation of market uptake	Specific contract	Egis Avia SAS	Framework contract	9 July 2025	19,880
Provision of event support to the SESAR 3 JU for ICNS Networking Dinner, Aerodays, and SESAR Innovation Days 2025	Specific Contract	TMAB Business Events	Framework Contract	21 March 2025	150,000
Provision of digital communication services - under framework contract	Specific Contract	European Service Network S.A.	Framework Contract	24 July 2025	24,893
Provision of Event Organisation Services	Specific Contract	TMAB Business Events	Framework Contract	15 September 2025	92,463.28
Provision of consultancy and support to SESAR JU – strategic management and facilitation of market uptake	Specific contract	Egis Avia SAS	Framework contract	5 September 2025	569,940
Provision of AU expertise to the DES programme	Specific contract	IATA	Framework contract	20 October 2025	199,864
Provision of AU expertise to the DES programme	Specific contract	EBAA	Framework contract	24 September 2025	99,737.50
SESAR Young Scientist Award (student category)	Prize	N/A	Contest	8 December 2025	5,000
SESAR Young Scientist Award (PhD category)	Prize	N/A	Contest	8 December 2025	10,000
Total for 2025					**2,229,298** [a]

[a] A framework contract is implemented through specific contracts. Framework contracts do not result in a charge to the SESAR 3 JU budget; only the specific contracts issued under framework contracts represent a charge to the SESAR 3 JU budget. The total therefore does not include the value of framework contracts.

1.4 Calls for proposals, evaluation procedures and outcomes

The evaluation phase of proposals stemming from ER3 (HORIZON-SESAR-2025-DES-ER-03) and IR2 (HORIZON-SESAR-2025-DES-IR-02) was launched at the closing of the calls on 16 September 2025.

The remote and central evaluation phases were carried out between 9 October and 28 November 2025 by a panel composed of 49 external experts (as presented in Table 7) and 3 SESAR JU staff experts. Additionally, 8 independent experts were contracted for ethics screening. The evaluators were briefed on applicable rules, processes, procedures, evaluation criteria, and the scope and objectives of the calls. During the individual evaluation phase, each proposal was independently evaluated against the award criteria by at least three evaluators. The evaluators prepared, for each proposal, an individual evaluation report, with comments and scores for each criterion. The individual evaluation phase was followed by consensus and panel review meetings where evaluators shared and finalised their comments and scores and agreed on the proposal ranking lists.

All ER3 and IR2 applicants have been informed about the evaluation results as of 29 January 2026.

Table 7 presents the gender and nationality of experts, while Figure 7 shows the types of organisations they represent.

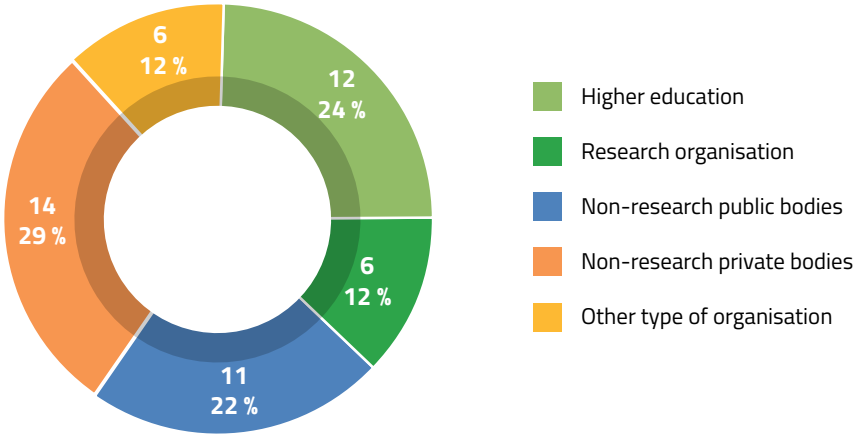
TABLE 7: EXPERTS FOR THE ER3 AND IR2 CALLS, BROKEN DOWN BY GENDER AND COUNTRY OF NATIONALITY

Country	Country group	Female experts	Male experts	Total experts
Austria	MS	0	1	1
Belgium	MS	0	1	1
Croatia	MS	0	1	1
Cyprus	MS	0	1	1
Czechia	MS	0	1	1
Estonia	MS	0	2	2
Finland	MS	1	1	2
France	MS	3	3	6
Germany	MS	1	2	3
Greece	MS	0	4	4
Hungary	MS	0	1	1
Ireland	MS	0	1	1
Italy	MS	1	3	4
Malta	MS	0	1	1
Netherlands	MS	0	2	2
Poland	MS	1	1	2
Portugal	MS	1	1	2
Romania	MS	1	0	1
Slovenia	MS	1	0	1
Spain	MS	3	3	6
Sweden	MS	0	1	1
Total MS		**13**	**31**	**44**

Country	Country group	Female experts	Male experts	Total experts
Switzerland	AC	0	1	1
Türkiye	AC	1	2	3
United Kingdom	AC	0	1	1
Total AC		**1**	**4**	**5**
Grand total		**14**	**35**	**49**
		28.57 %	**71.43 %**	**100 %**

NB: MS: Member State; AC: associated country.

FIGURE 7: **NUMBER AND SHARE OF EXPERTS FOR EACH TYPE OF ORGANISATION**



In addition, the SESAR JU contributed its technical expertise during the evaluation phase of DSD4 (CEF-T-2024-SIMOBGEN) launched under the CEF, for which the evaluation took place in March 2025 and resulted in the selection of the project AMEA. More Information on DSD3 is provided in Section 1.2.4.1.

1.5 Follow-up activities linked to past calls

Information on ER1, ER2, IR1, the joint call with EU-Rail, DSD1a, DSD1b, DSD2 and DSD3 ongoing projects that were active during the reporting period is available in Section 1.2.

1.6 Openness, cooperation, synergies, and cross-cutting themes and activities

Information on the collaboration with other European programmes, and on partnerships and synergies between the JU's actions and national or regional initiatives and policies, is provided in Section 1.2.5, in line with Article 17(2)(p) and Article 26(2)(d) and (f) of the SBA.

1.7 Progress against key impact pathways and the SESAR 3 JU's key performance indicators

1.7.1 Progress against general Horizon Europe key impact pathways indicators

Horizon Europe incorporates an approach to capturing and communicating impacts by means of the key impact pathways (KIPs) [24]. The objective of this approach is to enable policymakers and the general public to gain regular insights into the effects and benefits of the programme over time in relation to European science, economy and society at large. The nine KIPs cover areas of scientific, societal and technological/economic impact, and focus on the impact of the Horizon Europe programme as a whole.

A full list of these KIPs can be found in Table A4 in Annex 3. The KIPs are not calculated directly by the JU, but automatically calculated and reported via the Horizon Dashboard, based on the continuous reporting of the projects. The calculation follows the methodology presented in the indicator methodology and metadata handbook.

Since the Horizon Europe KIPs are automatically generated by the Horizon Dashboard, they only reflect the projects funded under ER1, ER2 and IR1 that are directly contractually managed by the SESAR 3 JU. They do not include results from the DSD projects, which are funded under the CEF budget, nor the Travel Wise project, which stems from a joint call with EU-Rail and is contractually managed by that JU.

[24] The general Horizon Europe KIPs are available in Annex V to Regulation (EU) 2021/695 of the European Parliament and of the Council of 28 April 2021 establishing Horizon Europe – the framework programme for research and innovation, laying down its rules for participation and dissemination, and repealing Regulations (EU) No 1290/2013 and (EU) No 1291/2013 (OJ L 170, 12.5.2021, p. 1, ELI: http://data.europa.eu/eli/reg/2021/695/oj).

1.7.2 Progress against Horizon Europe key performance indicators common to Joint Undertakings

Horizon Europe introduces common criteria for all European partnerships, including the JUs. They are complementary to the KIPs and each JU's specific KPIs. These indicators, which have been designed to capture quantitative and qualitative information and aspects of the functioning of the JUs, can be grouped into four categories: additionality and directionality, transparency and openness, coherence and synergies, and international visibility and positioning.

1.7.2.1 Additionality and directionality

Additionality is fundamental to the EU partnership model, and the SESAR 3 JU's members complement EU funding with investments and activities. Although precise data on the additional investments triggered by the EU contribution to the JU (KPI2) will only be available following the completion of the first wave of projects, the contribution (both financial and in-kind) from its members other than the Union (KPI1) reached a total amount of EUR 565,77 million since the beginning of the programme. Compared with the EUR 343.4 million in EU contributions paid to the SESAR 3 JU over the same period ([25]), this represents a leverage of 1.65. In terms of directionality, the objectives of the SESAR 3 JU align primarily with the European Commission priority 'A new plan for Europe's sustainable prosperity and competitiveness', while also contributing clearly to 'A new era for European defence and security'. As a result, the entirety of its budget is being dedicated to these priorities (KPI3), which are at the core of the DES programme.

1.7.2.2 Transparency and openness

Launched in 2025, ER3 and IR2 resulted respectively in 496 and 739 participations from 39 countries, including all EU Member States (KPI5). A detailed breakdown of applicants by types of entity and country is provided in Section 1.3.1. During the reporting period, Volocopter and Lilium left the partnership, reducing the number of members to 55 (KPI6). This number is expected to increase again in 2026 following the call for expressions of interest approved by the GB in December 2025 and launched the following month. Although no new grant agreements were signed in 2025, the number of newcomers increased slightly from 126 to 142 thanks to the inclusion of new participating organisations in ongoing projects through amendments (KPI7).

1.7.2.3 Coherence and synergies

In terms of synergies with other EU partnerships (KPI8), the SESAR 3 JU strengthened its collaboration with other JUs, notably through back-office arrangements for procurement support services, accounting services, human resources, and information and communications technology (ICT) services. Of note is the collaboration with the Clean Aviation JU in the elaboration of the aviation R & I strategy (ARIS) and its subsequent coordinated dissemination. In addition, collaboration with EU-Rail was made possible thanks to the joint project Travel Wise which, beyond the work on the technical aspects, provided opportunities for exchanges on management processes and best practices (e.g. lump sum funding).

Over the reporting period, the SESAR 3 JU consistently sought collaborations and synergies with other R & I initiatives at the EU, national, regional and sectoral levels (KPI9), accelerating the uptake of SESAR Solutions and amplifying their impact on the European ATM network and globally.

([25]) This amount is in line with the 2025 annual accounts, Chapter 4.6, p. 49.

In 2025, the SESAR 3 JU further expanded its network of collaborations with R & I stakeholders in Europe, notably by signing MoCs with the regions of Campania and Galicia. Sections 1.2.4.3 and 1.2.5 provide details on the ad hoc collaborations and various activities with R & I initiatives.

The SESAR 3 JU has been successful in leveraging complementary funding from other EU funds (KPI10), notably from the CEF and Horizon Europe. This has resulted in an additional EUR 142 million, covering the projects under DSD1a, DSD1b, DSD2 and DSD3. This represents the equivalent of an additional 62 % of the budget the JU has distributed through its calls under Horizon Europe since the start of the DES programme (i.e. EUR 228.5 million).

1.7.2.4 International visibility and positioning

The SESAR 3 JU conducts numerous activities aimed at raising awareness and increasing the visibility of its operations and results within the EU and internationally (KPI11). This includes organising and participating in international events, and numerous publications, newsletters, news items and social media activities. More information on these activities can be found in Section 2.1. These awareness-raising activities have been successful in attracting R & I stakeholders from beyond the EU Member States and Horizon Europe associated countries, as evidenced by the participation of six entities in the projects currently active (KPI4). The decrease compared to last year (16 entities) is due to the fact that Switzerland has since become an associated country to the Horizon Europe programme. As a result, entities established in this country are no longer counted under this indicator.

1.7.3 Progress against the key performance indicators specific to the SESAR 3 JU

The specific KPIs for the SESAR 3 JU are detailed in Table A7, Annex 5. These metrics evaluate the JU's performance across three main levels: (1) resources (input), processes and activities, (2) outcomes, and (3) impacts. This logic chain creates a direct link between the activities of the JU and the achievement of the objectives of the DES programme.

Following the adoption of the 2025 *European ATM Master Plan*, indicators and related targets capturing the outcomes and impact of the programme have been revised and aligned with the new priorities and timeline for the roll-out of phases C and D.

Since the beginning of the programme, the SESAR 3 JU has managed a total of 68 projects (18 ER1, 18 ER2 and 32 IR1). In addition, ten DSD projects were funded under the CEF and one project under the joint call with the EU-Rail JU. The SESAR 3 JU continues to collaborate with other EU programmes and initiatives to maximise impact and leverage synergies. However, since the DSD4 call expected in 2025 did not materialise, the number of calls capturing such synergies with other EU programmes remained stable at five. Overall, the synergy with the CEF (DSD1a, DSD1b, DSD2 and DSD3) and the joint call with EU-Rail JU have generated additional EU funding of EUR 144 million. Moreover, the SESAR 3 JU members' contributions total EUR 565,77 million ([26]).

In terms of outcomes, a significant number of the new SESAR Solutions at TRL6 or more are expected to be delivered following the completion of the first wave of DES projects, in particular IR1. As highlighted in Section 1.2.3.4 on release 15, the DSD1a projects delivered eight new SESAR Solutions. Seven needs related to standardisation and regulation were identified. The delivery of phase C is near completion, with 66 % of the development completed, and stable compared to last year. Further progress is expected in 2026, when most projects under IR1 will reach their exit maturity gates. Initial progress on phase D will also start to materialise

([26]) Figure cumulative since the beginning of Horizon Europe.

with the results of the IR1 projects. Regarding the market deployment of the solutions delivered by R & D in industrialisation supporting phase C, 33 % are under implementation, demonstrating progress towards a full deployment of SDOs by 2035, as envisaged in the *European ATM Master Plan* ([27]).

The impact section of the KPIs is based on the expected performance outcomes of the *European ATM Master Plan*. It includes a set of metrics designed to capture the overall benefits anticipated from deploying SESAR Solutions as part of the Master Plan's roll-out. As new SESAR Solutions are delivered, they will progressively enable the measurement and reporting of impacts against the 2023 reference year. At this stage, several indicators in the impact section remain to be confirmed (TBC), reflecting their forward-looking nature.

Overall, the 2025 results confirm that implementation is progressing as planned and remains consistent with the programme's expected trajectory.

1.8 Dissemination and information about project results

In 2025, a series of actions were implemented aiming to raise awareness among beneficiaries about the importance of the dissemination and provision of information about the projects' results. The activities implemented were tailored to the specific situation of the projects, depending on the different projects' implementation stages. Project-specific information is available on the Projects Portal.

([27]) Further details on the status of the development and deployment of phase C and the SDOs, and on the development priorities underpinning phase D, are provided in Section 1.2.1.2.

2 Support to operations

2.1 Communication activities

2.1.1 Events and conferences

In 2025, the SESAR 3 JU organised the SESAR 3 JU Annual Conference and the SESAR Innovation Days and participated in more than 50 external events, including several major conferences. Event highlights from 2025 include the following.

SESAR 3 JU Annual Conference, 18 February 2025, Brussels

The 2025 SESAR 3 JU Annual Conference presented the new *European ATM Master Plan*, including its vision, strategic deployment objectives and development priorities, and highlighted the expected benefits and associated investment needs.

The conference gathered 500 participants, including policymakers, industry leaders, and stakeholders from across the aviation sector. Attendees also had the chance to explore an on-site digital sky marketplace exhibition, featuring a sample of the SESAR 3 JU's innovative projects and cutting-edge technologies that are reshaping ATM.

Aerodays 2025, 7–9 May 2025, Warsaw

The SESAR 3 JU played a central role at Aerodays 2025, where Europe's leading aviation thinkers and innovators discussed the path towards a more sustainable, digital and resilient future for aviation. The SESAR 3 JU participated in various discussion panels and organised dedicated sessions and an exhibition stand featuring DES projects: JARVIS, ECHOES, HERON and ENSURE.

Airspace World 2025, 13–15 May 2025, Lisbon

Europe for Aviation partners (DG Mobility and Transport, CINEA, EDA, EASA, EUROCAE, EUROCONTROL, EUSPA, SDM and the SESAR 3 JU) participated at Airspace World 2025, showcasing how collaboration is transforming Europe's skies into a seamless, sustainable and future-ready aviation ecosystem.

Throughout the event, the Europe for Aviation partners organised live demonstrations, highlighting innovations that support sustainability and airspace modernisation. These were complemented by mini-theatre sessions featuring presentations on the latest developments shaping the future of European aviation. In addition, 17 guided SESAR walking tours were conducted, presenting cutting-edge research in ATM and the implementation of SESAR Solutions contributing to smarter, greener and safer skies. Aviation specialists from among the Europe for Aviation partners were also available to engage with stakeholders, providing insights into current policies, funding opportunities, technologies and operational solutions shaping European airspace.

Paris Air Show, 16–22 June 2025, Paris

The SESAR 3 JU took part in the Paris Air Show, joining the European Commission and Clean Aviation JU. While the show mainly highlights aircraft innovation, it offered a chance to explain the role of ATM in ensuring that aircraft fly safely, sustainably and efficiently. A key highlight of the event was the handover of ARIS to the European Commissioner for Sustainable Transport and Tourism, Apostolos Tzitzikostas.

European R & I Days and the European Innovation Council Drone Day, 16–17 September, Brussels

The SESAR 3 JU participated in the European R & I Days in Brussels, presenting its activities and results in modernising ATM. At the European R & I Days exhibition area, the DSD project ECHOES showcased a prototype satellite antenna, illustrating the potential of satellite-based technologies to transform aviation connectivity, efficiency and sustainability, even in the remote and oceanic regions.

On the margins of the event, the European Innovation Council Drone Day offered a dedicated platform to present innovative drone solutions from the DES portfolio. Projects BURDI, SAFIR-Ready and U-ELCOME demonstrated how Europe is shaping the future of safe, sustainable and scalable drone operations.

EASN International Conference, 14–17 October 2025, Madrid

Showcasing innovative projects and engaging with the next generation of aviation professionals were among the highlights for SESAR 3 JU, which participated in the 15th EASN International Conference.

Organised by the EASN in collaboration with Universidad Politécnica de Madrid, the conference attracted more than 600 participants from academia and industry to discuss breakthrough concepts and disruptive technologies shaping the future of aviation and space, with a strong focus on sustainability. The SESAR 3 JU was actively engaged throughout the four-day conference, participating in panel discussions, technical paper sessions and poster exhibitions, and hosting a dedicated exhibition stand featuring a selection of SESAR JU projects.

SESAR Innovation Days 2025, 1–4 December, Bled

Over 450 researchers, industry leaders and policymakers gathered in Slovenia for the 15th SESAR Innovation Days, hosted by Pipistrel and supported by the University of Ljubljana. The event demonstrated how collaboration is driving Europe's ATM transformation – turning bold ideas into real-world solutions for a Digital European Sky.

Slovenia's contributions took centre stage, with leaders from the Ministry of Transport, Slovenia Control, Pipistrel and the University of Ljubljana showcasing advancements in ANSP innovation, electric aviation, and interdisciplinary research. Plenary sessions tackled service delivery models, human–machine teaming and future-proofing aviation with global navigation satellite systems and virtual operations. Over 56 technical papers, 8 technical demonstrations and 40 posters were presented, covering topics from climate-optimised trajectories to quantum computing.

The event also featured the SESAR Young Scientist Awards, recognising groundbreaking contributions from students and early-career researchers.

2.1.2 Press

In 2025, the SESAR 3 JU contributed to seven newspaper and magazine articles, spanning EU (*POLITICO and Science Business)* and specialised trade press (*Aviation Week, Aerospace TechReview, Paris Air Show news, Cleared, Network Industries Quarterly*), and was mentioned in 1 654 press articles, a small increase compared to 2024.

In June, the SESAR 3 JU collaborated with the Clean Aviation JU on the promotion of ARIS, issuing a joint press release, publishing an op-ed in *POLITICO* and organising a press briefing with the European Commissioner for Transport and Tourism, Apostolos Tzitzikostas, and aviation stakeholders during the Paris Air Show.

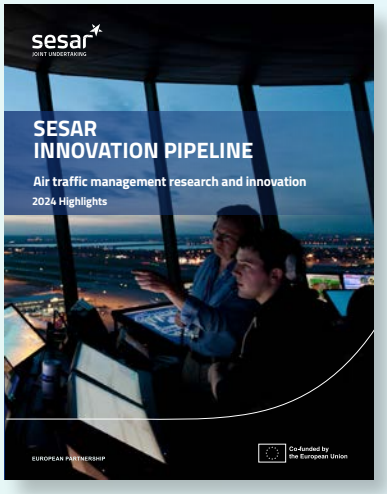
2.1.3 Publications

The SESAR 3 JU published the following publications throughout the year, which were promoted through online channels and at key events.

SESAR Innovation Pipeline – Air traffic management research and innovation – 2024 highlights

Get the highlights from some of the SESAR 3 JU R & D activities, which took place over the course of 2024. The brochure features updates from each strand of the programme: exploratory research, industrial research, fast track and DSDs.

View publication



Smart airports and innovations in multimodality

This publication by CORDIS showcases how the SESAR 3 JU is making airports smarter and more connected, offering passengers more reliable and resilient transport. Airports play a pivotal role in the European transport ecosystem, acting as key nodes that seamlessly connect air travel with other modes of transport, such as rail. In an increasingly interconnected and a more environmentally responsible world, ensuring smooth and efficient transitions between these modes is not just an aspiration but a necessity for creating a more integrated and sustainable transport system.

View publication

Enabling Europe's competitiveness in the skies

Europe's air transport system supports 15 million jobs and underpins trade, tourism and connectivity. With traffic expected to grow by 30 % by 2030, the performance of our skies will directly shape Europe's economic strength.

This factsheet sets out what is at stake and how ATM modernisation and SESAR innovation are essential to boosting Europe's competitiveness, reducing delays and emissions, and securing a resilient, cyber-protected airspace.

View publication

2.1.4 Online communications

2.1.4.1 Website and e-news

In 2025, the SESAR 3 JU developed new content for its website (https://www.sesarju.eu/), including 126 news items about programme-related developments and project results, and a dedicated interface on the *European ATM Master Plan*. The JU's web performance was very positive, with significant increases in key metrics: + 95 % in visits, + 80 % in unique downloads and + 74 % in unique page views compared to 2024. The monthly e-news was sent to over 8 000 external contacts. In addition, 53 dedicated event mailshots and press releases were distributed, attracting further traffic to the SESAR 3 JU website.

2.1.4.2 Social media

In 2025, the SESAR 3 JU's social media communication achieved positive results in terms of performance. The SESAR 3 JU published just over 1 340 posts across its social media channels, generating the most engagement on LinkedIn, which saw the biggest growth rate (+ 14.6 %). LinkedIn also generated important traffic to the SESAR 3 JU website.

The good performance can be explained by a series of scheduled promotion campaigns, which helped increase the visibility of the JU across the channels on which it is active. These included campaigns on the *European ATM Master Plan* and ARIS, Project of the Month, SESAR Delivers, International Women's Day and International Air traffic Controller's Day, and coverage of key events.

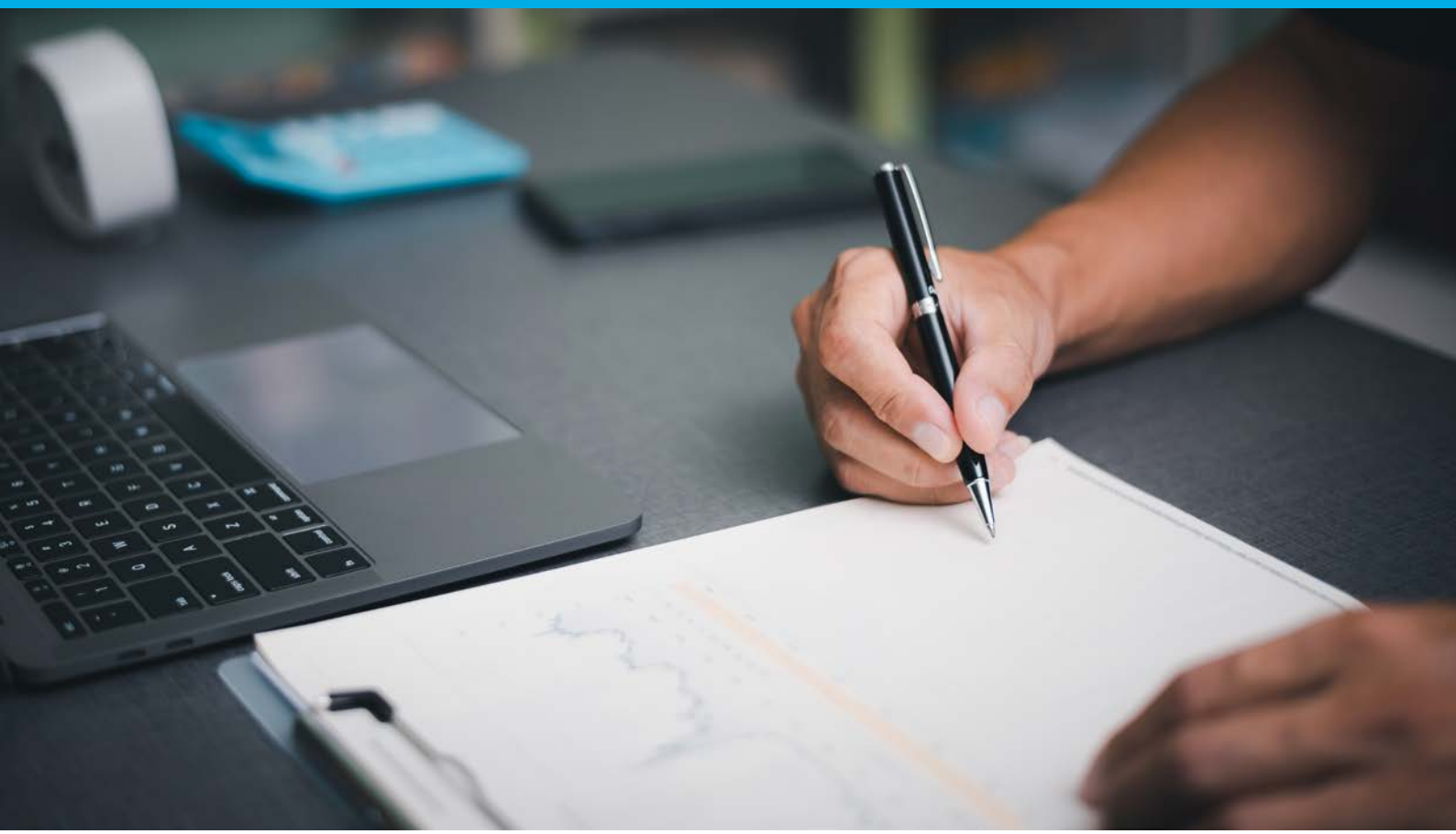
In 2025, the SESAR 3 JU Executive Director published three blogs, which increased engagement rates with C-level audiences.

- ATM modernisation: A high-return investment for Europe's connectivity and competitiveness – published to coincide with the SESAR 3 JU Annual Conference (18 February 2025).
- Resilience by design in air traffic management – published to coincide with Airspace World (13–15 May 2025).
- OUTATIME: The future of ATM belongs to those who evolve – published to coincide with the ICAO Innovation Fair in Montreal (22 September 2025).

2.1.4.3 Digital assets

In 2025, the SESAR 3 JU developed a number of videos and animations to promote the programme and encourage projects to develop video material about their work:

- SESAR Solutions animations:
  - SESAR supporting airport performance
  - Supporting airport surface safety
- International Women's Day
- International Air Traffic Controllers Day
- 2025 SESAR 3 JU Annual Conference
- Airspace World 2025
- End-of-year highlights.



2.2 Legal and financial framework

The SESAR 3 JU was established on the basis of the SBA and Article 187 of the Treaty on the Functioning of the European Union.

The financial rules of the SESAR 3 JU, adopted by its GB under decision GB(D)01-2021, comply with Commission Delegated Regulation (EU) 2019/887 on the model financial regulation for public–private partnership bodies.

2.2.1 Legal support provided to operations

In 2025, a range of operational and governance activities required legal input to ensure that they were carried out in line with the applicable institutional and regulatory framework.

Cooperation with institutional and regional partners led to the preparation and formalisation of several arrangements such as MoCs and SLAs. Legal input also supported the organisation of yearly initiatives, such as the SESAR Young Scientist Awards contest.

During the year, legal work contributed to internal decision-making through the drafting and review of Executive Director decisions in areas such as internal control, risk management, cybersecurity, digital document management, financial management and corporate governance.

Operational activities required legal clarification, particularly on subcontracting conditions, the status of affiliated entities, grant implementation matters and specific interpretations of the membership conditions and their consequences, including in the event of insolvency.

Legal support was also provided for the handling of requests for access to documents.

At the governance level, legal work supported the preparation of several decisions adopted by the GB in 2025, including the termination of a member following insolvency proceedings, the update of the distribution of voting rights, the amendment to the Membership Agreement and the launch of a new call for expression of interest for associated members.

Overall, these activities helped ensure that operational work and governance developments progressed within a clear and consistent legal framework throughout the reporting period.

2.2.2 Data protection activities

During the reporting period, data protection activities were carried out in line with the 2024–2025 BAWP and with the SESAR 3 JU's longterm commitment to fostering a robust privacy culture and practice.

Records and related data protection notices were drafted or updated for the following processes: staff engagement survey, event registration, staff appraisal, access to premises, and prize management.

In support of the digital transformation, the SESAR 3 JU launched and completed the initial phases of a data protection impact assessment (DPIA) in view of a potential deployment of Office 365 and Copilot. In addition, comprehensive data protection advice was provided, in close cooperation with ICT services, prior to the deployment of new projects or technologies.

Several training sessions were delivered: general data protection training for all staff, and specialised sessions on data breaches, document management and for the support services team.

Regarding synergies with other JUs, the SESAR 3 JU provided technical advice to those making use of the framework contract for operational and legal support in data protection activities.

2.3 Budgetary and financial management

On 12 December 2024, the GB approved the 2025 budget through decision GB(D)11-2024.

The first amending budget of 2025 ([28]) reactivated EUR 2 925 340.40 in unused payment appropriations to cover legal commitments from previous years under Title 1 and Title 2 (administrative costs). In addition, EUR 242 000 in payment appropriations (administrative) were reinscribed to reflect additional needs identified following a budget exercise that took place within the JU. Furthermore, EUR 5 574 975.65 in payment appropriations were reinscribed under Title 5 (unused appropriations not required in the current year), to cover future operational expenditure (Title 4). Additionally, EUR 6 579 988.14 in payment appropriations were transferred from Title 4 to Title 5. Finally, a total of EUR 2 229 859.79 in unused commitment appropriations were reinscribed, composed of EUR 242 000 covering additional administrative needs, EUR 1 258 000 in administrative appropriations transferred to Title 5 and EUR 729 859.79 in unused operational commitment appropriations.

([28]) Decision GB(WP)01-2025 – Adopting the third amended version of the SESAR 3 JU bi-annual work programme 2024–2025.

TABLE 8: **STATEMENT OF REVENUE FOR 2025**

Statement of revenue: heading	Initial 2025 budget		Amended 2025 budget	
	Commitment appropriations (EUR)	Payment appropriations (EUR)	Commitment appropriations (EUR)	Payment appropriations (EUR)
EU contribution excluding European Free Trade Association (EFTA)	**87,689,782**	**90,587,212**	**87,689,782**	**90,587,212**
of which administrative	3,172,824	3,172,824	3,172,824	3,172,824
of which operational	84,516,958	87,414,388	84,516,958	87,414,388
Third countries contribution including EFTA	**12,078,135**	**12,157,814**	**12,078,135**	**12,157,814**
of which administrative	87,253	87,253	87,253	87,253
of which operational	2,324,216	2,403,896	2,324,216	2,403,895
of which third countries excluding EFTA	9,666,666	9,666,666	9,666,666	9,666,666
Industry financial contribution	**7,142,857**	**7,142,857**	**7,142,857**	**7,142,857**
of which administrative	7,142,857	7,142,857	7,142,857	7,142,857
of which operational				
Other revenue				
Subtotal revenues	**106,910,774**	**109,887,883**	**106,910,774**	**109,887,883**
Reactivation of unused appropriations from administrative expenditure	**458,274**	**261,524**	**1,958,274**	**3,428,865**
of which from 2022				
of which from 2023	458,274	261,524	1,958,274	3,428,865
of which from 2024				
Reactivation of unused appropriations from operational expenditure	**57,470,963**		**58,200,823**	**5,574,976**
of which from 2022				
of which from 2023	924,617		1,540,181	
of which from 2024	56,546,345		56,660,642	5,574,976
Total	**164,840,012** [29]	**110,149,408** [30]	**167,069,871**	**118,891,724**

In 2025, the SESAR JU received revenue amounting to EUR 109 829 162 to support the implementation of its activities.

A total of EUR 102 745 026 was received from the European Commission to cover outstanding administrative and operational obligations under Horizon Europe. This amount comprised EUR 3 260 077 for administrative expenditure and an operational expenditure envelope of EUR 99 484 949. This amount comprises United Kingdom participation in Horizon Europe for an amount of EUR 9 666 666. Within this operational envelope, from the United Kingdom contribution, EUR 900 000 was transferred directly from DG Mobility and Transport to the Research Executive Agency to support the evaluation activities of ER3 and IR2.

[29] Rounded up to the nearest euro.
[30] Rounded up to the nearest euro.

EUROCONTROL contributed EUR 2 771 414 to the SESAR 3 JU's running costs for the year, bringing its cumulative contribution to EUR 13 914 343 by the end of 2025.

Contributions from the other members of the JU amounted to EUR 3 543 173. These contributions represented their first financial payments under Horizon Europe. While the provisions of the Membership Agreement establish an annual amount of EUR 3 571 428.57, the amount actually paid in 2025 was EUR 3 543 172.53, because of the bankruptcy of two Members. The missing amount (EUR 28 256.04) will be added to the EUR 3 571 428.57 amount for the 2026 payment.

The JU also received exceptional revenue amounting to EUR 769 549 deriving from audit recoveries, reimbursement of prefinancing (including amounts recovered following the Lilium GmbH bankruptcy), recoveries from EASA, and minor administrative adjustments.

TABLE 9: STATEMENT OF EXPENDITURE FOR 2025 – COMMITMENT APPROPRIATIONS

Statement of expenditure (commitment appropriations)	Initial 2025 budget (EUR)	Amended 2025 budget with transfers (EUR)	Executed 2025 budget (EUR)	Executed/ amended (%)	Carried over to 2026 [31] (EUR)	Available for future use (n + 3 rule) [32] (EUR)
Title 1 – Staff expenditure	**7,118,557**	**7,335,557**	**6,998,391**	**95 %**	**395,938**	**338,594** [33]
Salaries and allowances	6,576,710	6,793,710	6,505,076	96 %	226,420	288,634
of which establishment plan posts	5,974,900	6,117,900	6,117,900	100 %	152,929	0
of which external personnel	601,810	675,810	387,176	57 %	73,491	0
Expenditure related to staff recruitment	10,000	10,000	4,592	46 %	3,000	5,408
Mission expenses	275,000	275,000	275,000	99 %	99,813	1,428
Training	60,000	48,000	27,589	57 %	5,000	20,411
External services	146,847	146,847	146,847	100 %	36,569	0
Other staff-related expenditure	50,000	62,000	39,287	63 %	25,136	22,713
Title 2 – Infrastructure and operating expenditure	**3,742,652**	**3,767,652**	**3,115,742**	**83 %**	**1,695,652**	**651,910**
Rental of buildings and associated costs	203,000	203,000	194,100	96 %	77,100	8,900
Information and communications technology and data processing	2,121,359	2,121,359	1,638,108	77 %	871,889	483,251

(31) It is to be noted that the amounts reported in the column 'Carried over to 2026' remained open amounts on 31 December 2025, from commitments in 2025 and from previous years.
(32) The column 'Available for future use' reports on unused budget on 31 December 2025 that will be available for re-inscription up to 'following three financial years' in accordance with Article 6.5 of the Financial Rules of the SESAR 3 JU.
(33) Includes EUR 1 428 assigned revenue (small recoveries from suppliers/staff).

Statement of expenditure (commitment appropriations)	Initial 2025 budget (EUR)	Amended 2025 budget with transfers (EUR)	Executed 2025 budget (EUR)	Executed/ amended (%)	Carried over to 2026 [31] (EUR)	Available for future use (n + 3 rule) [32] (EUR)
Movable property and associated costs	5,000	5,000	0	0 %	0	5,000
Current administrative expenditure	793,293	780,293	647,196	83 %	338,634	133,097
Expenditure on formal meetings	25,000	25,000	23,161	93 %	11,638	1,839
External communication, information and publishing	595,000	633,000	613,177	97 %	396,391	19,823
Title 3 – Operational expenditure on SESAR 2020	**0**	**2,322,796 [34]**	**2,402,721 [35]**	**100 % [36]**	**0**	**0**
Previous years' calls / other funded initiatives	0	2,322,796	2,322,796	100 %	0	0
Title 4 – Operational expenditure on DES and SESAR JU operations	**153,978,803**	**152,385,867**	**153,002,774 [37]**	**100 % [38]**	**152,602,293 [39]**	**0**
Current year's calls / other funded initiatives	153,978,803	152,385,867	153,002,774	100 %	152,602,293	0
Title 5 – Unused appropriations not required in the current year [40]	**0**	**1,258,000**	**0**	**0 %**	**0**	**1,258,000**
Total	**164,840,012**	**167,069,871 [41]**	**165,519,628**	**99 %**	**154,693,882 [42]**	**2,248,504**

[34] Transfer from Title 4 Horizon Europe of EUR 2 322 796 to Title 3 Horizon 2020 to cover reimbursement to the European Commission in relation to Delegation Agreement MOVE/E3/DA/2017-564/SI2.771010 on U-space demonstration activities. This amount is to be recovered from Horizon 2020 funds with the first amendment of the Budget 2026.
[35] This amount comprises EUR 79 924 of assigned revenue from Horizon 2020 projects' recoveries.
[36] For consistency, this percentage is based solely on the amended budget amount of EUR 2 322 796, excluding the assigned revenue of EUR 79 924.
[37] This amount comprises EUR 616 907 of assigned revenue from Horizon Europe recoveries of pre-financing.
[38] For consistency, this percentage is based solely on the amended budget amount of EUR 152 385 867, excluding the assigned revenue of EUR 617 907.
[39] Includes assigned revenue of EUR 617 907.
[40] Title 5 is intended for gathering unused appropriations from previous years that can be reused in subsequent years (*n* + 3 rule). Therefore, there is no consumption during the year, in both commitment and payment appropriations.
[41] EUR 1 difference due to rounding.
[42] EUR 1 difference due to rounding.

TABLE 10: STATEMENT OF EXPENDITURE FOR 2025 – PAYMENT APPROPRIATIONS

Statement of expenditure (payment appropriations)	Initial 2025 budget (EUR)	Amended 2025 budget with transfers (EUR)	Executed 2025 budget (EUR)	Executed/ amended (%)	Carried over to 2026 (EUR)	Available for future use (n + 3 rule) (EUR)
Title 1 – Staff expenditure	**7,118,557**	**7,399,537**	**6,660,724**	**90 %**		**738,813**
Salaries and allowances	6,576,710	6,840,673	6,325,699	92 %		514,974
of which establishment plan posts	5,974,900	6,117,900	5,964,971	98 %		152,929
of which external personnel	601,810	722,773	360,729	50 %		362,044
Expenditure related to staff recruitment	10,000	10,000	1,592	16 %		8,408
Mission expenses	275,000	285,178	181,753 ([43])	64 %		103,425
Training	60,000	50,178	22,589	45 %		27,589
External services	146,847	151,507	114,938	76 %		36,569
Other staff-related expenditure	50,000	62,000	14,152	23 %		47,848
Title 2 – Infrastructure and operating expenditure	**3,545,902**	**6,432,262**	**3,854,190**	**60 %**		**2,578,072**
Rental of buildings and associated costs	196,250	269,128	192,537	72 %		76,592
Information and communications technology and data processing	2,121,359	4,148,018	2,462,898	59 %		1,685,119
Movable property and associated costs	5,000	30,356	13,497	44 %		16,859
Current administrative expenditure	793,293	1,039,269	508,196	49 %		531,073
Expenditure on formal meetings	25,000	26,885	13,408	50 %		13,476
External communication, information and publishing	405,000	918,606	663,653	72 %		254,953
Title 3 – Operational expenditure on SESAR 2020	**0**	**2,366,943** ([44])	**2,402,721** ([45])	**98 %** ([46])		**44,147** ([47])
Previous years' calls / other funded initiatives	0	2,366,943	2,402,721	98 %		44,147

([43]) Includes assigned revenue of EUR 1 428.
([44]) Transfer from Title 5 Horizon Europe of EUR 2 366 943 to Title 3 Horizon 2020 to cover reimbursement to the European Commission in relation to the Delegation Agreement MOVE/E3/DA/2017-564/SI2.771010 on U-space demonstration activities. This amount is to be recovered from Horizon 2020 funds with the first amendment of the Budget 2026.
([45]) This amount comprises EUR 79 924 assigned revenue from Horizon 2020 projects' recoveries.
([46]) For consistency, this percentage is based on the amended budget amount of EUR 2 366 943 and the assigned revenue EUR 124 071 (EUR 79 924 used for the reimbursement of U-space demonstration activities to the European Commission and EUR 44 147 unused), i.e. EUR 2 402 721 v EUR 2 446 867.
([47]) Assigned revenue from Horizon 2020 projects' recoveries (*ex post* audits).

Statement of expenditure (payment appropriations)	Initial 2025 budget (EUR)	Amended 2025 budget with transfers (EUR)	Executed 2025 budget (EUR)	Executed/ amended (%)	Carried over to 2026 (EUR)	Available for future use (n + 3 rule) (EUR)
Title 4 – Operational expenditure on DES and SESAR 3 JU operations	**33,797,786**	**31,400,798**	**32,013,718** [48]	**100 %** [49]		**3,988**
Current year's calls / other funded initiatives	33,797,786	31,400,798	32,013,718	100 %		3,988
Title 5 – Unused appropriations not required in current year	**65,687,164**	**71,292,184**	**0**	**0 %**		**71,292,184**
Total	**110,149,408**	**118,891,724**	**44,931,353**	**38 %**		**74,657,203** [50]

Overall, in 2025, the execution rate of commitment and payment appropriations reached 99 % and 38 % respectively. Commitment implementation under Titles 1, 2 and 4 was particularly high, reflecting strengthened budget planning efforts within the JU. 100 % of operational expenditure was committed following the launch of ER3 (EUR 24 000 000) and IR2 (EUR 230 000 000).

Regarding the payment appropriations, the implementation rate reaches 93 % by excluding Title 5. The overall implementation rate is 38 %. Title 5 (unused appropriations not required in the current year) amounts to EUR 71 292 184 in operational payment appropriations ([51]). These operational appropriations were accumulated over the past two years to cover the pre-financing of ER3 and IR2, due to be paid in 2026, which explains the low payment rate for 2025.

This temporary accumulation of operational payment appropriations reflects the fact that the SESAR 3 JU launched two major calls during the programming period (IR1 for EUR 181.35 million in 2023 and IR2 for EUR 230 million in 2025), while commitment and payment appropriations continue to follow the annual transfer pattern set out in the legislative financial statement.

Administrative and staff expenditure

In 2025, and in line with the Financial Rules of the SESAR 3 JU ([52]) which stipulate that the SESAR 3 JU budget shall contain only differentiated appropriations, payment appropriations under Titles 1 and 2 are also considered as differentiated and are not automatically carried over.

Under Title 1 (staff expenditure), the implementation rate reached 95 % for commitments and 90 % for payments.

Under Title 2 (administrative expenditure), the implementation rate reached 83 % for commitments and 60 % for payments.

The unspent amounts related to interim staff, missions, training, other staffrelated expenditure, human resources (HR) support fees, information technology (IT) services, and buildingrelated charges were carried forward to the following year.

The payment implementation rate of 60 % for Title 2 represents an improvement compared with 2024. This progression reflects enhanced forecasting efforts, strengthened payment monitoring and improved internal coordination. Further improvements are expected in 2026 to increase the payment rate.

([48]) This amount comprises EUR 616 907 assigned revenue from Horizon Europe recoveries of pre-financing.
([49]) For consistency, this percentage is based solely on the amended budget amount of EUR 31 400 798, excluding the assigned revenue EUR 617 907.
([50]) EUR 1 difference due to rounding.
([51]) The total amount of unused appropriations reported in the Annual Accounts amounts to EUR 73 042 184 as it includes EUR 1 750 000 in assigned revenue received from the European Commission in 2022 for the implementation of the DSDs (in cooperation with CINEA) that was not activated in 2025.
([52]) Decision GB(D)012021 of 14 December 2021, Annex I.

Operational expenditure

Under Title 3 (Horizon 2020 programme) and following the SESAR 3 JU's submission of the final report for the completion of Uspace demonstration activities (Delegation Agreement MOVE/E3/DA/2017 564/SI2.771010), an amount of EUR 2 402 720.59 was reimbursed to the European Commission. Horizon Europe appropriations were temporarily used to execute this reimbursement and will be regularised once Horizon 2020 appropriations are reactivated through the first amendment of the Budget 2026.

Under Title 4 (Horizon Europe programme), payments executed in 2025 amounted to EUR 32 013 718. These were distributed as follows:

- EUR 3 519 548 for interim payments under ER1,
- EUR 8 147 086 for first interim payments under ER2,
- EUR 15 570 421 for interim payments under IR1,
- EUR 4 776 663 for other operational activities.

This level of execution reflects the normal phasing of Horizon Europe projects, with payments aligned with the progress reported by beneficiaries and the schedules set out in the grant agreements.

2.4 Financial and in-kind contributions from members other than the EU

Members other than the EU have three possibilities to contribute to the DES programme: i) by paying their annual financial contribution to the administrative costs of the SESAR 3 JU ii) by contributing in-kind to the DES projects (in-kind contributions to operational activities (IKOP)); and iii) by declaring in-kind contributions to additional activities (IKAA).

IKOP can be 'planned' from the signature of a grant agreement, covering the entirety of the grant duration, 'reported' at the end of each reporting period, together with the other costs, 'estimated' at year-end based on the costs expected to be incurred during the year but not yet reported, or 'validated' once the payment of the EU funding is made after the report has been accepted.

IKAA are successively 'planned' if they are included in the annual plan adopted by the GB, 'reported' by 31 May of the year following the activities, and 'certified' as soon as an audit certificate is sent to and assessed by the JU.

TABLE 11: **CONTRIBUTIONS FROM MEMBERS OTHER THAN THE EU, 2025**

Contributions from SESAR 3 JU Members other than the Union in 2025		
Nature	**Amount for EUROCONTROL (EUR)**	**Amount for the other members (EUR)**
Financial contributions paid (A)	2,771,414	3,543,173
IKOP reported, not yet validated (B)	1,406,956	1,133,774
IKOP estimated, not yet reported (C)	34,425,702	25,777,395
IKOP reported and validated (D)	34,361,966	21,727,735
IKAA reported, not yet certified (E)	—	85,890,286
IKAA reported and certified (F)	25,980,112	57,110,973
Total of all contributions	**98,946,150**	**195,183,336**
Total of financial contributions, validated IKOP and certified IKAA (A + D + F)	**63,113,492**	**82,381,881**

TABLE 12: **VALUES OF IKOP – EVOLUTION SINCE 2021**

Reference of the call	Total amount of IKOP planned	Total amount of IKOP validated up to 31 December 2025
DES-IR-01	152,773,575	54,415,419
DES-ER-01	2,451,840	869,753
DES-ER-02	2,060,664	804,530
Total	**157,286,079**	**56,089,701** [53]

TABLE 13: **VALUES OF IKAA – EVOLUTION SINCE 2021**

Values of IKAA – evolution (EUR)				
Year of the Additional Activity	EUROCONTROL		Other members	
	Amount of certified IKAA	Amount of reported but not yet certified IKAA	Amount of certified IKAA	Amount of reported but not yet certified IKAA
2021	—	—	—	—
2022	6,964,000	—	43,046,256	7,623,744
2023	16,511,801	—	46,636,659	27,190,341
2024	16,915,314	—	45,496,218	50,170,985
2025 (assessed until GB meeting)	25,980,112	—	57,110,973	85,890,286
TOTAL since 2021	**66,371,227**	**—**	**192,290,106**	**170,875,356**

Following an Internal Audit Service (IAS) recommendation, as a principle, the IKAA amounts reported in the consolidated annual activity report (CAAR) for a given year should be aligned and consistent with those presented in the annual accounts of the same year. Ensuring such consistency requires taking into account the respective timelines: the deadline for members to report IKAA is the end of May, while the annual accounts must be prepared and submitted to the ECA by the end of May, so that they can be sent to the budgetary authority by the end of June. Given the time needed for the preparation of the annual accounts, only a limited share of IKAA reported for the reference year, typically those received by mid-May, can be assessed in time for their inclusion in the accounts ([54]). As a result, a significant portion of IKAA incurred during the reporting year are not included in the final annual accounts.

To mitigate this time lag and provide transparency and visibility on the expected level of IKAA incurred in 2025 (the CAAR reporting year), the SESAR 3 JU also discloses, for information purposes, the IKAA amounts reported by members up to 31 May 2026, that were assessed in June, and therefore not included in the annual accounts. This approach ensures the reliability and auditability of the reported figures, while maintaining visibility on the most recent IKAA developments.

([53]) Out of which EUR 34 361 966 for EUROCONTROL and EUR 21 727 735 for the other members.

([54]) As 1st of June 2026, the figures published in the final annual accounts: cumulative certified amount of IKAA amounted to EUR 226,144,622 (EUROCONTROL: EUR 66,371,227 and the Other Members: EUR 159,773,395). The cumulative amount of IKAA reported but not certified yet amounted to EUR 159,976,236 (only for the Other Members).

2.5 Corporate programming and reporting

2.5.1 Corporate programming

On 14 December 2023, the GB adopted the 2024–2025 BAWP ([55]). This BAWP was amended twice in 2024 and once in 2025.

In 2025, the amendment was technical in nature and was adopted through a written procedure on 22 April 2025 ([56]). The amendment primarily concerned the reactivation and reallocation of unused payment and commitment appropriations from previous years to cover administrative and operational needs, ensuring continuity of legal commitments and alignment with updated financial requirements.

The amendment also included adjustments to the establishment plan, reflecting one reduction in an EU-financed post following the revision of the MFF and the addition of one post financed through third country contributions. In addition, a modification was introduced to the text of the IR2 and ER3 calls, removing the mandatory requirement for linked actions and collaboration agreements.

2.5.2 Corporate reporting

In 2025, the SESAR 3 JU released its 2024 CAAR, which the GB approved at its meeting on 25 June 2025 ([57]). Throughout the reporting period, the SESAR 3 JU regularly monitored and assessed, on a quarterly basis, progress on achieving the 2025 objectives as defined in the 2024–2025 BAWP, to ensure an accurate reporting in the 2025 CAAR ([58]).

Evaluation of the SESAR 3 JU in the context of the midterm review of Horizon Europe

The 2024 CAAR already reported on the positive results of the assessment of the SESAR 3 JU as part of a study supporting the interim evaluation of Horizon Europe published in August 2024 ([59]). In April 2025, the European Commission published the results of the interim evaluation of Horizon Europe ([60]), which included Annex 19 dedicated to the SESAR 3 JU.

The conclusions of the evaluation of the SESAR 3 JU are very positive, confirming that it is on track to achieve its mandate as the central component of the technological pillar of the SES. The evaluation recognises that the SESAR 3 JU plays a crucial role in modernising European ATM by aligning research, development and deployment efforts, by fostering synergies with other EU initiatives, and by ensuring coordination of all the relevant actors across the entire ATM innovation value chain.

The EU added value of the partnership is clearly demonstrated. The SESAR 3 JU remains the only coordinated European R & I instrument in ATM, ensuring coherence across the entire innovation cycle and mobilising significant funding for EU development and deployment, generating substantial projected economic and operational benefits. The estimated impact of future SESAR Solutions includes shortening flight paths, increasing traffic capacity, and reducing ATM-related delays and fuel consumption.

With a leverage effect of 1.78 (1 euro of EU funding bringing an additional 1.78 euro investment from the members other than the EU), among the highest of Horizon Europe JUs, the SESAR JU demonstrates strong industry commitment and investment capacity. Programme management performance is equally robust, consistently outperforming the 'time to' targets, maintaining a high budget execution rate and a low cumulative error rate, and keeping administrative costs under control.

([55]) Decision GB(D)13-2023 – Adoption of the bi-annual work programme 2024–25.
([56]) Decision GB(D)01-2025 – Adopting the third amended version of the SESAR 3 JU bi-annual work programme 2024–2025.
([57]) Decision GB(D)02-2025 – Approving the consolidated annual activity report for the year 2024.
([58]) These objectives and indicators, along with the targets and results, are reported in Table 1, Section 1.
([59]) European Commission: DG Research and Innovation, Austrian Institute of Technology and Brodnik, C., *Partnership Evaluation Report: Single European Sky ATM Research 3 Joint Undertaking (SESAR 3 JU) – Horizon Europe and the green transition interim evaluation support study*, Publications Office of the European Union, 2024, https://data.europa.eu/doi/10.2777/7895247.
([60]) Commission Staff Working Document – Interim evaluation of the Horizon Europe framework programme for research and innovation (2021–2024) – Accompanying the document 'Communication from the Commission to the European Parliament and the Council – Horizon Europe: Research and innovation at the heart of competitiveness', SWD(2025) 110 final of 30 April 2025, https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex:52025SC0110.

The evaluation further recognises the SESAR 3 JU as a global ambassador for European ATM, promoting alignment with the SES framework internationally and contributing to the harmonisation of global ATM modernisation efforts. By bringing together the full ATM value chain – from research organisations and industry to service providers, regulators and international partners – the SESAR 3 JU ensures strategic alignment with SES objectives and reinforces Europe's technological global leadership and sovereignty in aviation.

Lessons learned highlight opportunities to further strengthen the integration of research and coordinated deployment, anticipate certification and standardisation earlier in the innovation cycle, streamline in-kind reporting processes, and broaden outreach beyond specialised ATM communities.

Overall, the interim evaluation confirms the SESAR 3 JU's effectiveness, efficiency, relevance and EU added value. It validates the integrated research-to-deployment model and reinforces its central role in delivering a greener, safer, more digital and harmonised European ATM system. This positive outcome of the midterm evaluation strengthens confidence for the future of the JU as preparations advance for the next MFF.

2.6 Administrative procurement and contracts

In 2025, the SESAR 3 JU implemented its procurement activities in line with the approved procurement plan and applicable financial rules, ensuring the provision of operational, communication, ICT and corporate services supporting the effective functioning of the JU and programme delivery.

Procurement relied primarily on framework contracts, including the interinstitutional arrangement with EUROCONTROL, enabling efficiency gains, regulatory compliance and continuity of services across key operational areas such as event organisation, communication, digital services and ICT support.

The continued use of established contractual mechanisms allowed for the timely award of specific contracts and orders while ensuring sound financial management and compliance with Articles 13(1) and 157 of the SBA.

The total value of administrative procurement activities in 2025 amounted to EUR 1 130 683, excluding framework contracts which do not constitute budgetary commitments.

TABLE 14: ADMINISTRATIVE PROCUREMENT AND CONTRACTS IN 2025

Subject	Type of contract	Contractor	Procurement procedure (if applicable)	Signature date	Amount (EUR)
Provision of event support to the SESAR 3 JU for the 2025 annual conference	Specific contract	TMAB Business Events NV	Framework contract	31 January 2025	30,822
Provision of event support to the SESAR JU for Airspace World 2025	Specific contract	TMAB Business Events NV	Framework contract	3 February 2025	74,918.89
Provision of meeting room and catering services	Purchase order	Rocco Forte Hotels	Very low value procedure	6 February 2025	1,014.60
EU data protection online central register	Specific contract	Privanot ASBL and Maiky BV	Framework contract	6 February 2025	14,000
Provision of web services from Q2 2025 to the first quarter (Q1) of 2026	Specific contract	European Service Network SA	Framework contract	10 March 2025	125,488
Provision of event support to the SESAR 3 JU for the Integrated Communications Navigation and Surveillance (ICNS) Conference networking dinner, Aerodays, and SESAR Innovation Days 2025	Specific contract	TMAB Business Events NV	Framework contract	21 March 2025	22,490.37

Subject	Type of contract	Contractor	Procurement procedure (if applicable)	Signature date	Amount (EUR)
Provision of consultancy services – ARIS phase 2	Purchase order	Roland Berger	Very low value procedure	21 March 2025	15,000
Provision of strategy, editorial, media, press and publication services	Specific contract	EU-turn SRL	Framework contract	25 March 2025	50,050.00
Provision of event organisation services	Framework contract	TMAB Business Events NV	Open call	11 April 2025	n/a
Provision of event organisation services	Framework contract	ProPager – Eurojeune SARL	Open call	11 April 2025	n/a
Provision of event organisation services	Framework contract	WMH Project (simplified joint-stock company)	Open call	11 April 2025	n/a
Front- and back-office reception services	Specific contract	Receptel NV	Framework contract	22 November 2024	76,500.00
Front- and back-office reception services	Framework contract	Receptel NV	Amendment	15 November 2024	n/a
Publication on POLITICO of an opinion piece by the SESAR 3 JU and the Clean Aviation JU (16 June 2025)	Purchase order	POLITICO	Very low value procedure	28 May 2025	13,000.00
2026 SESAR 3 JU Annual Conference	Specific contract	WMH Project (simplified joint-stock company)	Framework contract	28 November 2025	139,160.12
SESAR 3 JU for Airspace World 2026	Specific contract	WMH Project (simplified joint-stock company)	Framework contract	10 December 2025	112,604.84
Provision of a mobile application for the SESAR Innovation Days 2025 event	Specific contract	European Service Network SA	Framework contract	10 June 2025	9,900.00
Catering and venue rental for the SESAR 3 JU away day	Purchase order	Great Traiteur	Very low value procedure	11 June 2025	6,465.00
Activities for the SESAR 3 JU away day	Purchase order	Funkey	Very low value procedure	11 June 2025	3,497.50
Press subscription 2025–2029	Direct contract	POLITICO	Exceptional negotiated	2 December 2025	74,427.00
Communication and promotional materials	Purchase order	Vegea	Very low value procedure	18 June 2025	3,289.50
Provision of strategy, editorial, media, press and publication services	Specific contract	EU-turn SRL	Framework contract	15 July 2025	90,050.00
Provision of cyber and information security services	Specific contract	Deloitte Consulting & Advisory BV/SRL	Framework contract	8 August 2025	56,400.00
Provision of ICT coordination services	Amendment	MG Management Consulting SRL	Direct contract	5 September 2025	35,942.40
Mobile telephony services	Specific contract	Proximus SA	Framework contract	3 October 2025	7,859.59
Image database subscription 2025–2027	License custom agreement	Shutterstock	Very low value procedure	9 October 2025	7,260.00
Networking drink DSD event (23 October 2025)	Purchase order	Great Traiteur	Very low value procedure	15 October 2025	3,289.50

Subject	Type of contract	Contractor	Procurement procedure (if applicable)	Signature date	Amount (EUR)
Provision of strategy, editorial, media, press and publication services	Specific contract	EU-turn SRL	Framework contract	17 October 2025	34,567.00
Adobe licenses	Order form	Bechtle NV – Brussels	Interinstitutional framework contract	22 October 2025	11,881.50
2025 end-of-year SESAR 3 JU social event	Purchase order	Le Roy d'Espagne	Very low value procedure	3 November 2025	6,978.00
Mobile telephony services	Amendment	Proximus SA	Specific contract	19 November 2025	2,739.61
Provision of Ongoing Eurodomain Services	Specific contract	Deutsche Telekom Business Solutions GmbH	Interinstitutional framework contract	28 November 2025	31,525.65
Update of the DPIA for Microsoft Office 365	Specific contract	Deloitte Consulting & Advisory BV/SRL	Amendment	18 December 2025	n/a
ICT support – MySESAR full-cycle delivery: design finalisation, implementation, migration and roll-out	Service order	EUROCONTROL	Administrative agreement	17 December 2025	149,543.42
Purchase of informatics equipment and/or services	Order form	Econocom Products & Solutions Belux	Interinstitutional framework contract	17 December 2025	11,409.52
Provision of information and quality management services – price revision (indexation)	Specific contract	MG Management Consulting SRL	Amendment	10 December 2025	9,285.12
Total for 2025					**966,790** [a]

[a] A framework contract is implemented through specific contracts. Framework contracts do not result in a charge to the SESAR 3 JU budget; only the specific contracts issued under framework contracts represent a charge to the SESAR 3 JU budget. The total therefore does not include the value of framework contracts.

2.7 Information technology and logistics

2.7.1 Information and communications technology management

In 2025, the SESAR 3 JU continued to rely on two primary providers for operational ICT services: EUROCONTROL, which delivered the majority of services under a formal agreement, and the European Commission. The JU made use of framework contracts established by DG Digital Services and directly managed these contracts for selected ICT services.

Several projects were launched to support the JU's transformation into a more digital and cyber-secure organisation, as envisaged in its operational objective 10. Overall, 2025 recorded a strong implementation rate of the JU's ICT action plan. All priority 1 projects, which are the most important to support the digital transformation, were either initiated or completed during the year, with one exception. This includes notably the implementation of a security operations centre (which went live in Q1 2026), the migration to Windows 11, and the physical upgrade of servers to connect to European Commission infrastructure (TESTA TAP). The only priority 1 project not launched – the VPN (virtual private network) replacement – was postponed to 2026 following a decision by EUROCONTROL. The successful implementation of the priority 1 projects enabled preparatory work to begin on selected priority 2 projects, including Teams telephony and cloud backup.

In addition, the first organisation-wide ICT and corporate assets allocation policy was adopted in 2025 ([61]). A major upgrade to email management was also completed, with the migration to Exchange Online initiated in 2024 and successfully finalised in Q2 of 2025.

The SESAR 3 JU continued to leverage synergies through the use of European Commission ICT systems and services, notably in the areas of:

- financial management and accounting (Accrual Based Accounting (ABAC) / SUMMA, Speedwell and Bluebell);
- HR management (Sysper);
- the management of Horizon Europe calls for proposals and grants (SyGMa-Compass);
- procurement (Public Procurement Management Tool);
- mission management (MIPS+);
- record management (Hermes-Ares-NomCom);
- corporate communication (SECABC and EU-Sign).

The JU also maintained a contract with an external ICT coordination service provider, which acted as a single focal point for users and ensured the integration of all ICT services into a coherent framework. This service, operational since 2023, continued in 2025 to manage relations with EUROCONTROL and the European Commission, ensuring alignment with budget planning and adherence to sound financial management principles.

During 2025, the SESAR 3 JU also advanced the digitalisation of its information and quality management system. Following an initial study

([61]) Decision S3JU/ED/093 of 3 December 2025.

and scoping phase, efforts focused on planning, alignment and preparation for the implementation of two closely interlinked transformation streams:

- information and collaboration management, including the mandatory technological transition from the current platform towards a Microsoft 365-based environment (MySESAR); and
- quality management, aimed at simplifying the existing system and aligning it with the organisation's current structure and ways of working, laying the groundwork for a new quality management system (QMS 2.0).

This work enabled the transition to implementation as of Q1 2026.

2.7.2 Cybersecurity

2025 was dedicated to documenting and further developing the cybersecurity maturity level of the SESAR 3 JU in a way that also demonstrated compliance with the cybersecurity regulation of December 2023 ([62]). During Q1, the SESAR 3 JU built on the deliverables of the 2024 Deloitte contract to develop policies, procedures and measures to ensure material was ready to meet the first deadline of 8 April.

By 8 April, the SESAR 3 JU put in place the required risk management, governance and control framework for cybersecurity. Its cybersecurity policy was adopted and published alongside the submission of an 'initial cybersecurity maturity review' and 'initial action plan' to the Cybersecurity Service for the Union Institutions, Bodies, Offices and Agencies (CERT-EU).

By 8 July, the SESAR 3 JU identified its cybersecurity risks and integrated them within the corporate risk management setup to enable cybersecurity to be considered under the corporate risk management process and procedures. In order to comply with the regulation, the SESAR 3 JU also submitted a maturity assessment and cybersecurity risk assessment based on templates provided by CERT-EU.

By 8 September, the SESAR 3 JU implemented its risk management measures by running the corporate risk exercise with cybersecurity risks integrated into the process for the first time. No submission was required to be sent to CERT-EU regarding compliance with this deadline.

In the run-up to the end of the year, the SESAR 3 JU prepared to ensure compliance with the 8 January 2026 regulatory deadline by developing an incident response plan, using the approach of the other JUs. The initial cybersecurity plan was kept up to date since its first submission to CERT-EU on 8 April in order to be ready for its submission by 8 January 2026. This plan has proven to be a very useful method of action tracking and monitoring.

The SESAR 3 JU established its SLA with CERT-EU, giving the SESAR 3 JU access to the catalogue of cybersecurity services and triggering the onboarding of SESAR 3 JU into a set of CERT-EU monitoring services.

In accordance with the work prepared in 2024, the SESAR 3 JU submitted to EUROCONTROL a service request for a security operations centre, this being essential to review the many security logs and reports by Microsoft Defender and other cybersecurity related implementations to identify possible cyber threats. There were a number of options proposed by and discussed with EUROCONTROL and the implementation of the security operations centre project was launched in December 2025 and went live in Q1 2026.

During 2025, CERT-EU also made additional requests for information to all EU bodies on sensitive security matters and on the identification of high-risk assets. The SESAR 3 JU has coordinated with EUROCONTROL and submitted responses to all requests within the deadlines given.

2.7.3 Management of facilities

The SESAR 3 JU wishes to become a greener organisation, while depending on EUROCONTROL for any action related to the premises. The implementation of EMAS was considered by EUROCONTROL in the first meetings of their corporate social responsibility group, back in 2024, to which the SESAR 3 JU was invited as an observer. There was no progress in 2025. As a result, the target for this objective was not met by year-end. This activity is part of the 2026–2027 BAWP and will be monitored in the coming years.

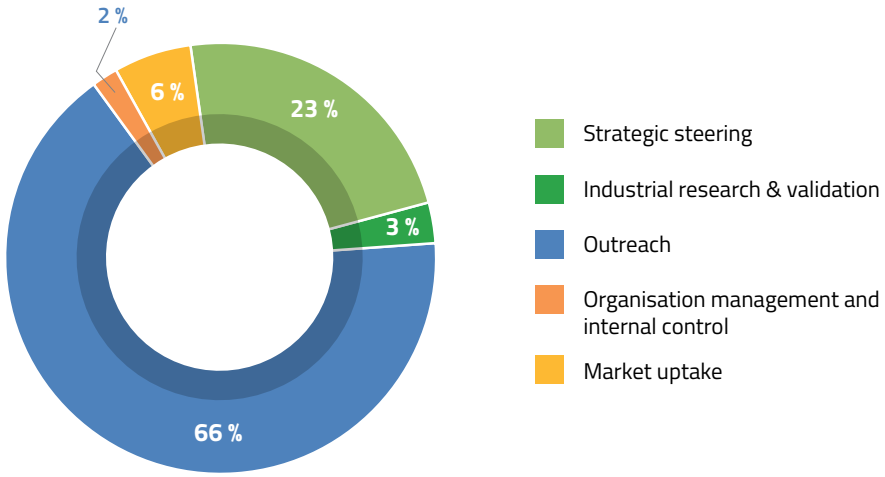
([62]) Regulation (EU, Euratom) 2023/2841 of the European Parliament and of the Council of 13 December 2023 laying down measures for a high common level of cybersecurity at the institutions, bodies, offices and agencies of the Union (OJ L, 2023/2841, 18.12.2023, ELI: http://data.europa.eu/eli/reg/2023/2841/oj).

Regarding physical security, in 2025 the composition of the first aid and first response teams was updated following the departure of old members and the appointment of new members. The findings from the security review conducted in 2024 were addressed, and corrective actions were completed during 2025, including actions implemented in close cooperation with EUROCONTROL, notably those resulting from the evacuation exercise. In the second half of the year, the SESAR 3 JU updated its physical security policy, including elements such as the new EUROCONTROL procedures for the provision of first aid assistance and the new evacuation procedures. The updated physical security policy was adopted and communicated in December 2025.

2.7.4 Travel coordination

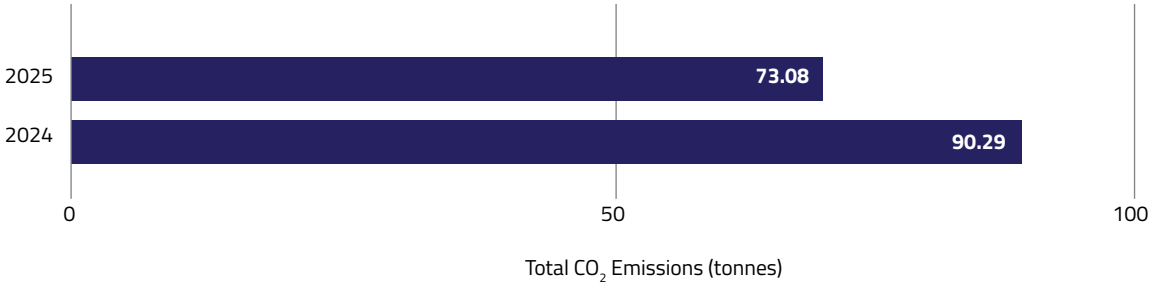
In 2025, SESAR 3 JU staff conducted a total of 144 missions (133 in 2024). This does not include the missions by the Programme Management Unit under the SESAR 3 JU EUROCONTROL agreement. In total, 95 (66 %) of these missions were related to SESAR 3 JU outreach, while 33 (23 %) where focused on strategic steering.

FIGURE 8: **MISSIONS BY AREA OF ACTIVITY, 2025**



Despite the increase in the number of missions in 2025, overall CO_2 emissions from missions, as calculated by the Commission tool, were lower than in 2024. This represents a positive development, reflecting continued efforts to optimise travel arrangements and reduce the environmental impact of business travel.

FIGURE 9: **CO_2 EMISSIONS ATTRIBUTABLE TO THE MISSIONS, 2024 AND 2025**



Source: European Commission Qlik Dashboard.

2.8 Human resources

2.8.1 Human resources management

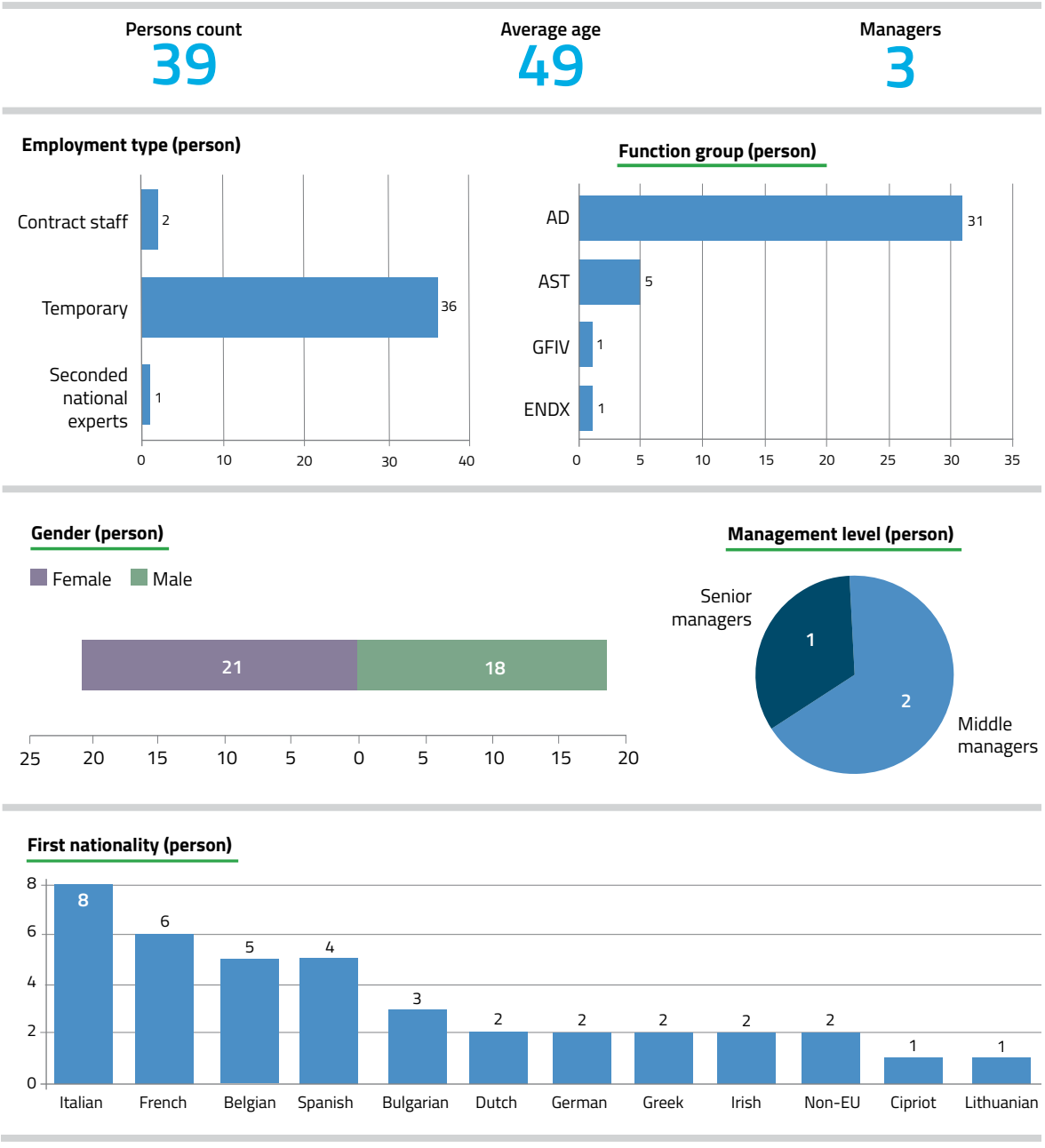
The effective allocation of staff remained a priority for the SESAR 3 JU during 2025. The SESAR 3 JU's approved 2025 staff establishment plan (SEP) includes 37 temporary agents (TAs), 2 contract agents (CAs) and 2 seconded national experts (SNEs). The authorised SEP and its implementation are presented in Annex 2. Compared to the initial staffing plan, the SEP includes a reduction of one TA position in 2025 (following the revision of the MFF) and envisages a further reduction of one SNE position in 2026, in line with the footnote included in the legislative financial statement of the Commission proposal for the SBA.

In 2025, the SESAR 3 JU recruited one temporary agent (external affairs officer) and one contract agent (communication assistant). At the end of 2025, the JU employed 36 TAs, 2 contract agents and 1 SNE.

The JU therefore maintained the vacancy rate at minimum level (2.4%) in 2025 allowing for a smooth and timely implementation of the staff reductions (one TA following the revision of the MFF and one SNE at the request of the European commission). This will ensure full occupancy in January 2026 while respecting the authorised dotation.

Regarding gender and geographical balance, the SESAR 3 JU remained committed to ensuring that its overall balance remains stable. At the end of 2025, 54 % of the 39 active staff were female and 46 % were male, with 12 nationalities represented (Figure 10).

FIGURE 10: **STAFF ACTIVE ON 31 DECEMBER 2025 – STATISTICS**



Throughout the year, efforts focused on the professional and career development of SESAR 3 JU staff, in addition to ensuring that allocated human resources were used in the most optimal, cost-efficient and effective way. The SESAR 3 JU conducted its appraisal exercise in accordance with the implementing rules. The reclassification exercise resulted in six TAs being reclassified. The SESAR 3 JU also organised the elections for the new Staff Committee.

The SESAR 3 JU carried out its staff engagement survey, achieving a positive outcome with an employee engagement score of 85 %, representing an increase of 6 percentage points compared to 2023 and standing 4 points above the EU average.

TABLE 15: **STAFF IMPLEMENTING RULES IMPLEMENTED IN 2025**

Staff implementing rules implemented in 2025	
Title of the staff implementing rules	**Reference and date of the GB decision**
Commission Decision C(2025) 2495 final of 13 May 2025 on the general provisions for implementing Articles 11, 12 and 13 of Annex VII to the Staff Regulations and on authorised travel	Decision GB(D)07-2025, adopted on 23 May 2025

2.9 Efficiency gains and synergies

The SESAR 3 JU is a small organisation with limited resources and must therefore place particular emphasis on efficiency in the use of its means. Over the last three years, the SESAR 3 JU has implemented many of the European Commission's corporate IT tools. In 2025, the JU focused on preparing for the implementation of SUMMA, the Commission's corporate financial and accounting tool, which entered production on 1 January 2026.

EU Agencies Network

The EU Agencies Network (EUAN) supports the work of the 52 EU decentralised agencies, JUs and bodies and their 13 000 staff located across 24 Member States. The network provides a platform for exchange and cooperation, contributing to the implementation of EU policies and promoting the development of a more sustainable, inclusive and competitive Europe for the benefit of all EU citizens. Two years ago, the governance of EUAN was revised to introduce a broader chair team ensuring the representation of smaller agencies and JUs. In this context, the Executive Director of the SESAR 3 JU represented all 10 JUs in this new setting until February 2026. Throughout the year, the SESAR 3 JU participated in several EUAN sub-groups, notably the Performance Development Network, to improve various corporate aspects, such as annual programming and reporting, risk management, internal control, auditing, and combating fraud.

Back-office arrangements

In accordance with Article 158 of the SBA, EUROCONTROL provides the SESAR 3 JU with back-office arrangement (BOA) services. In addition, the SESAR 3 JU is engaged with other JUs on most of their BOAs (as described below).

Over the 2nd semester of 2025, the senior management of the JUs engaged in reflections on the organisation and scope of the BOA. These discussions laid the groundwork for developments planned for 2026, including an increased role for the SESAR 3 JU in specific BOA domains (e.g. BOA procurement, BOA legal).

BOA Accounting

The BOA Accounting has been fully operational since 2023, with EU-Rail JU at its head. Accounting officer services are jointly provided by three JUs: Clean Aviation JU, SESAR 3 JU and EU-Rail JU. As of January 2025, the BOA Accounting team is composed of three accounting officers supported by three accounting assistants.

The BOA Accounting delivers the intended services, including the preparation of the provisional and final annual accounts for 10 JUs, liaison with the audit teams on accounting matters, follow-up on the collection of accounts receivable past the due date, VAT (value added tax) reporting to the Belgian authorities, an annual validation of the accounting system, and the inscription of the budget.

During 2025, the BOA Accounting continued to ensure the business continuity of its services and prepared the provisional accounts for the 10 JUs in a timely manner while already receiving a positive opinion from the European Court of Auditors (ECA) for 9 out of 10 JUs. The BOA Accounting has also provided, on request, ad hoc support for the implementation and update of financial systems and financial processes.

BOA Procurement

The BOA Procurement is jointly led by the Clean Aviation and EU-Rail JUs.

In 2025, the SESAR 3 JU continued to contribute actively to procurement cooperation under the BOA, supporting the implementation of interinstitutional procurement procedures among JUs and promoting harmonised practices.

Following a mandate from three JUs, the SESAR 3 JU finalised the interinstitutional call for tenders for the provision of event organisation support services, leading to the signature of three framework contracts in 2025 for the benefit of four JUs. The SESAR 3 JU subsequently organised kick-off meetings and provided ongoing coordination support to facilitate the consistent implementation of the framework contracts across participating entities.

The SESAR 3 JU also continued coordinating the implementation of the framework contracts for operational and legal support to data protection activities, signed in 2024 on behalf of 10 JUs, further consolidating shared procurement practices under the BOA framework.

Building on this experience, the SESAR 3 JU provided targeted support to the interinstitutional open tender procedure for communication services (LOT 1 – Strategy, editorial, media, press and publications), involving nine JUs and a maximum budget of EUR 5 300 000. Following the reception of a high number of tenders, the SESAR 3 JU assumed the role of delegated leading contracting authority for the legal and administrative evaluation and overall coordination of LOT 1, as formalised through an amendment to the memorandum of understanding with the Clean Aviation JU. In this role, the SESAR 3 JU organised and chaired evaluation activities, coordinated technical and financial inputs and prepared the evaluation outputs and tenderer communications, enabling the procedure to be completed within 2025. This cooperation illustrates the practical functioning of BOA arrangements and the capacity of JUs to jointly address complex procurement processes through shared expertise and resources.

The 2025 activities of the BOA Procurement also included extensive discussions led by the SESAR 3 JU on the conditions of a possible on-boarding for the use of eContracting by the JUs with DG DIGIT. These discussions led to a substantial reduction of the annual cost of use of this module for smaller EUIBAs and update of the related contractual conditions.

BOA human resources

In 2025, the JUs continued to optimise their synergies and implemented several initiatives in selected areas.

In line with the 2025 BOA HR action plan, the JUs have:

- finalised the alignment and harmonisation of the selection and recruitment practices across all JUs;
- strengthened cooperation by organising an HR officers' away day to share best practices and enhance collaboration;
- shared reserve lists to reduce time-to-recruit and provided expertise and resources by contributing as panel members to several selection procedures across JUs;
- supported newly established JUs by providing guidance, advice and templates;
- centralised the organisation of training courses of common interest for all JUs (e.g. ethics and integrity, respect and dignity in the workplace, first-aid training);
- joined the Standing Working Party of the EUAN as part of a dedicated JU cluster to facilitate effective participation of the JUs;
- contributed to the development of a common JU HR legal framework by sharing executive director and Governing Board decisions on various HR regulatory matters;
- finalised the selection of new confidential counsellors to reinforce the existing network.

The JUs, as interinstitutional partners, have also attended meetings held by the European Commission on the HR transformation programme aiming at setting up a new IT platform to replace Sysper. The JUs will further strengthen this collaboration in 2026.

The Circular Bio-based Europe Joint Undertaking (CBE JU), as lead JU for the BOA HR, also ensured the coordination of the inter-JU HR officers network and the governance-related tasks. Notably, at the end of 2025, the CBE JU launched an amendment of the HR BOA SLA to enlarge the composition of the Steering Committee to include all heads of administration and finance of the JU signatories. This enhanced collaboration is a first step towards stronger collaboration among JUs in the HR domain in 2026.

BOA ICT

The BOA ICT entered into force on 16 January 2025. It provides ICT planning, execution and coordination services to participating parties. Its objective is to enhance synergies across the JUs, reduce the administrative burden, and improve procurement efficiency and service quality.

The SESAR 3 JU is an opt-in party to this agreement. Due to its specific constraints and ICT service delivery set-up and location, it has signed the BOA ICT SLA, aligning with its principles to foster synergies and benefit from knowledge sharing on common ICT activities, including European Commission services, security and governance. The SESAR 3 JU may also participate in coordination efforts and receive common services on request.

FINNAIR
STOP

3 Governance

3.1 Major developments

During 2025, two members, Volocopter and Lilium, ceased their participation in SESAR 3 JU activities following insolvency proceedings affecting the companies. This illustrates the financial and industrial challenges currently faced by the eVTOL (electric vertical take-off and landing) sector in Europe. The Governing Board enacted their withdrawal from the partnership on 23 June 2025, while the affected projects were modified to ensure continuity of activities and objectives. The Mutual Insurance Mechanism was activated to safeguard the financial interests of the JU and of the programme.

3.2 Governing Board

In 2025 the Governing Board met on three occasions, two for ordinary meetings and one for a seminar dedicated to the future of the SESAR project. The Governing Board adopted ten decisions, including the 2026–2027 BAWP and the second call for expressions of interest for associated members, which had the objective of selecting a limited number of entities to extend the geographical coverage of the current SESAR 3 JU membership. Results of this call are expected in Q2 2026.

Among the main outcomes of the seminar on the future of the SESAR project was the recognition by participants of the importance of a public–private partnership to ensure the coordination of the entire innovation lifecycle (from exploratory research to industrial research and to deployment) resulting in a vertical integration of the technological pillar of the SES. A close cooperation among ATM stakeholders, including standardisation bodies and regulators, was also considered essential to reduce fragmentation and bridge the gap between research and deployment and to deliver the new service delivery model.

Throughout the year, the Governing Board had fruitful exchanges on ARIS and on the future requirements for ATM research. GB members also supported the work done to define a roadmap for the implementation of the new service delivery model and were involved in the preparation of the proposal for CP2.

3.3 Executive Director

Mr Andreas Boschen has held the position of SESAR 3 JU Executive Director of the since 1 July 2022. He is the legal representative and the chief executive for the day-to-day management of the JU, in accordance with the decisions of the GB and in line with Articles 19 and 152 of the SBA.

3.4 States' Representatives Group

The SRG met twice in 2025 and expressed a positive opinion on the 2024 CAAR and on the draft 2026–2027 BAWP. Regarding the latter, the SRG recommended that, in the future, indicators associated with the main operational objectives should measure concrete deliverables or outcomes.

In addition, the SRG held exchanges with the SESAR 3 JU about the preparation of ARIS, the next MFF proposal, and the preparation of the CP2 proposal, with representatives from Members States asking for early and substantive involvement in the preparation process.

The group continued seeking synergies with national and/or regional programmes and initiatives. Due to the limited availability of information, a formal plan to capture synergies with national programmes was not developed. Nevertheless, the chair encouraged SRG representatives to proactively share relevant information during meetings to support future coordination and alignment where possible.

On the administrative side, the mandate of the chair team ends in January 2026 and the process to appoint the future chair and vice-chair started in December 2025.

3.5 Scientific Committee

The SC met four times in 2025. It provided advice for both the 2024 CAAR and the 2026–2027 BAWP. Additionally, some members were involved in the selection of the 2025 Young Scientist Awards.

During 2025, SC members continued to discuss the importance of making data as open and available as possible to the ATM research community. They initiated a dialogue with EUROCONTROL to explore ways to enhance EUROCONTROL's data repository, particularly by increasing its usability among researchers.

SC members also held exchanges with representatives of the EASA Scientific Advisory Board to explore possibilities to jointly stimulate research and innovation. Discussions focused on priorities areas such as safety, cybersecurity and sustainability, and the need to anticipate emerging technologies within the aviation community. As a result, a document outlining a proposed framework for cooperation, along with targets and budget requirements, was drafted and presented to the European Commission.

3.6 Programme Committee

In 2025, the SESAR 3 JU organised three meetings of the PC.

The PC was regularly updated on the progress made in the development of ARIS that aimed at defining an integrated vision and ambition for future European aviation research and innovation ([63]).

The PC was updated about the progress made in the development of the CP2 proposal, in particular in the selection of the SDO solutions. Active engagement of SESAR 3 JU members was ensured though their participation in the working arrangement set up to capture the view of all ATM stakeholders.

The PC was also briefed about the progress of the Task Force on the New Service Delivery Model, co-chaired by the SESAR 3 JU and the A6 Alliance ([64]). The outcome of the task force, namely the level 2 decomposition, was well received by the PC, which recognised it as the reference to use for the development of the next generation of ATM platforms ([65]).

The PC oversaw the monitoring of release 15 and was regularly informed on the progress through dedicated reports, leading to the outcomes detailed in Section 1.2.3.4. In addition, the committee was kept informed of the progress of the DES programme.

Finally, the PC members contributed to the annual IKAA exercise. The 2024 IKAA reporting exercise was successfully carried out, with the final figures annexed to the 2024 CAAR. In line with the SESAR 3 JU procedure for the planning, reporting and assessment of IKAA ([66]), the exercise included an assessment by the JU of the nature of the activities, their contribution to the objectives of the DES programme, and their compliance with the applicable operational, legal and financial requirements, as well as their consistency with the IKAA Plan. Regarding the 2025 IKAA plans, members had the opportunity to update the figures submitted in 2024. Additionally, they were invited to contribute to the 2026 IKAA planning exercise, which was finalised at the end of November.

([63]) On ARIS, see Section 1.2.1.1.
([64]) https://www.a6alliance.net/about/
([65]) More information on this topic is provided in Section 1.2.4.3.
([66]) Decision GB(D)08-2023 on the Approval of Planning, Reporting and Monitoring procedure of In-Kind contributions to the SESAR 3 JU.

4 Financial management and internal control

4.1 Control results

The SESAR 3 JU applies, mutatis mutandis, the components, principles and characteristics set forth in the European Commission's internal control framework. Internal control systems and procedures are applicable at all levels of management and are designed to provide reasonable assurance of achieving the following objectives:

- effectiveness, efficiency and economy of operations;
- reliability of reporting;
- safeguarding of assets and information;
- prevention, detection, correction and follow-up of fraud and irregularities.

4.1.1 Effectiveness of controls

4.1.1.1 *Ex ante* controls on operational expenditure

For Horizon Europe, *ex ante* controls are systematically carried out before signing grant agreements and amendments to grants or before making payments according to the European Commission corporate guidance on Horizon Europe *ex ante* controls. Standard *ex ante* risk-based checks are performed as standard practice. These checks are documented in the risk management module of SyGMa and encompass factors such as Early Detection and Exclusion System status, Horizon Europe participation count, SME status, establishment year, reinforced monitoring and *ex post* audit findings. Among

these, the Early Detection and Exclusion System status, reinforced monitoring and *ex post* audit results are the most pertinent to the SESAR 3 JU.

Regarding Horizon Europe, in light of the significant changes introduced in the Commission's control strategy for Horizon Europe, which prevents JUs from establishing their own specific representative samples and calculating their specific representative and residual error rates, the JUs have adopted a common implementation approach, which includes the following elements:

- enhanced risk-based *ex ante* controls;
- risk-based *ex post* audits;
- a feedback loop between the different building blocks of the internal control system (this means that risks spotted at the grant agreement preparation, amendment or reporting and payment stage should be taken into account in all grant management cycles, and in particular when selecting cost claims for *ex post* audits; the results of the *ex post* audits should inform and refine future *ex ante* controls).

Targeted risk-based *ex ante* controls include the following.

- Four financial workshops organised in 2025 and before the start of reporting periods, focusing on the specific projects in the reporting period concerned, highlighting the major changes between Horizon 2020 and Horizon Europe, explaining the new methodology to calculate personnel costs, reminding participants of important eligibility criteria in order to avoid common errors and providing general instructions in case of bankruptcies in the consortium.
- Systematic clarifications asked of SMEs that declare personnel costs in category A.1 instead of A.4 in their cost claim.
- Dedicated meetings with inexperienced beneficiaries who have difficulty reporting their costs.
- Regular exchanges with top beneficiaries who seek advice regarding the eligibility of costs.

In parallel, the SESAR 3 JU has put in place a risk-based approach for assessing risks at the project level and mitigating measures to address these risks.

4.1.1.2 *Ex post* control of operational expenditure and error rates identified

The R & I family operates via a common audit strategy intended to contribute to the legality and regularity of expenditure on a multi-annual basis, including through the detection and correction of non-systemic and systemic errors.

For Horizon 2020 and Horizon Europe, the Common Audit Service (CAS) of the Common Implementation Centre (CIC) within the European Commission's DG Research and Innovation, carries out all the financial audits ([67]), including those concerning grants managed by the executive agencies, the JUs and EUSPA. The main indicators on legality and regularity of EU framework programmes for research and innovation are the cumulative representative detected error rate and the cumulative residual error rate ([68]).

The targets as set out in the materiality criteria are:

- for Horizon 2020, to ensure that the cumulative detected error rate remains within a range of 2 to 5 %, aiming to be as close as possible to 2 %;
- for Horizon Europe, to ensure that cumulative detected and residual error rates do not exceed 2 %.

4.1.1.2.1 Results of the Horizon 2020 *ex post* audits

Even though the CAS is still reporting the R & I family's control results for the Horizon 2020 framework programme, these are no longer considered relevant for SESAR 3 JU, as in 2025 the operational expenditure concerned only Horizon Europe funds.

4.1.1.2.2 Horizon Europe framework programme

2025 was the fifth year of implementation of the Horizon Europe framework programme.

The error rates based on the results of *ex post* controls for Horizon Europe on 31 December 2025 are as follows.

- Cumulative representative detected error rate for the framework programme: 4.38 % ([69]).
- Cumulative residual error rate for the framework programme: 4.05 %.

([67]) Except audits for Article 185 bodies.
([68]) DG Research and Innovation's assurance building, indicators and materiality criteria are outlined in Annex 5 of their annual activity report; audit coverage is outlined in Annex 7.
([69]) Based on 89 representative audits and 29 representative technical reviews out of the 177 expected audits and 30 technical reviews in the first common representative sample.

These error rates are calculated based on the ex post financial audits and ex post technical review results available when drafting the annual activity report. Due to the still relatively small number of completed audits and technical reviews, the error rate calculation is highly sensitive to extreme results.

As well as in Horizon 2020, most of the Horizon Europe errors continue to relate to incorrect claims for actual personnel costs that are mainly due to beneficiaries' incorrect application of the Horizon Europe rules, despite the introduced simplifications. Newcomers and SMEs remain those most prone to errors in comparison to the more experienced / large size beneficiaries.

Horizon Europe error rates – particularly residual error rates – should be considered within a time perspective. The implementation of audit results and extension of audit findings over time tend to lower the cumulative residual error rate, thereby increasing its difference in relation to the representative detected error rate.

Within the R & I family, despite the implementation of an action plan to address some causes of errors ([70]), a reservation is issued in DG Research and Innovation's *Annual Activity Report 2025* as the cumulative residual error rate at the end of 2025 is above the 2 % materiality threshold ([71]).

4.1.1.2.3 Results of the SESAR-specific *ex post* audits

The SESAR 3 JU takes note of the reservation expressed by Commission services at Horizon Europe programme level due to an error rate exceeding the 2% materiality threshold. However, the SESAR 3 JU does not consider it necessary to include a similar reservation in its CAAR. Under a conservative scenario, whereby the amount at risk is calculated using the cumulative R & I detected and residual error rates (i.e. 4.38 %) and with no Horizon Europe corrections, the amount at risk for the SESAR 3 JU would be EUR 1.4 million. This amount remains below the EUR 5 million threshold set by the *de minimis* rule for financial reservations and would therefore not warrant a reservation.

Even though the common representative sample is the appropriate indicator of the legality and regularity of the transactions for the entire R & I family, the SESAR 3 JU calculates specific results based on audits of its own population and its own expenditure, and the result is below the materiality threshold.

In July 2024, the CAS sampled one SESAR 3 JU beneficiary under Horizon Europe, for the common representative sample for the SESAR 2025 targets. The audit was launched in 2024 and finalised in 2025 and resulted in 0 % error. The snapshot was taken from the first payments of two projects under IR1 and out of a total EU-requested contribution amount of EUR 3 704 178, and the selected beneficiary had an EU-requested contribution of EUR 2 885 486, i.e. 78 % coverage of the SESAR 3 JU expenditure in that snapshot.

The last snapshot of the population of the SESAR Horizon Europe activities was taken in June 2025. The cost claims received and paid by this cut-off date (a total of EUR 11 860 905) resulted in a sample of three participations with a total value of EUR 606 523 by three beneficiaries and an audit coverage of 7 % (in relation to the cleaned entries amounting to EUR 8 156 726) ([72]).

Additionally, the European Court of Auditors (ECA), for its own assurance audits, has drawn five samples of SESAR 3 JU payments incurred in 2025. Four out of five audits resulted in no adjustment, whereas one audit resulted in a negative adjustment of – 5.66 % error in favour of the beneficiary. The total calculated error of the SESAR 3 JU ECA audits for 2025 ([73]) was – 0.52 %.

The SESAR 3 JU has established an effective mechanism to correct errors through recoveries and financial corrections. Table 16 presents the number of audit results processed since the beginning of Horizon 2020. In terms of audit result implementation, the SESAR 3 JU processed 100 % of the received audit results in a timely manner (i.e. within six months), as shown in Table 17.

([70]) See Annex 7 of DG Research and Innovation's *Annual Activity Report 2025*.
([71]) The reserve in the declaration of assurance for the Horizon Europe and Euratom expenditure is addressed in Annex 9 of DG Research and Innovation's *Annual Activity Report 2025*.
([72]) Note to the file – risk assessment for Horizon Europe 3rd CAS sample (2nd SESAR Horizon Europe sample) – ref. ARES(2025)9016687-22/10/2025.
([73]) ECA closing letters ref. CL-75316, CL-75270, CL-75247, CL-75358 and CL-75387.

TABLE 16: **CUMULATIVE NUMBER OF IMPLEMENTED AUDIT RESULTS, 2017–2025**

SESAR 3 JU	Audit results processed	Percentage of audit results processed	Audit results pending	Percentage of audit results pending	Total
Audits	148	99.3	1	0.7	149
Extensions	169	100	0	0	169
Total	**317**	**99.7**	**1**	**0.3**	**318**

TABLE 17: **TIME TO IMPLEMENT CLOSED AUDIT RESULTS IN THE 2025 FINANCIAL YEAR**

SESAR 3 JU	Zero to six months	Percentage of total number (zero to six months)	> six months	Percentage of total number (> six months)	Total
Closed projects	**21**	**100**	**0**	**0**	**21**
Negative adjustments with recovery	11	100	0	0	11
Negative adjustments without recovery	4	100	0	0	4
Positive or zero adjustment	6	100	0	0	6
Ongoing projects	**5**	**100**	**0**	**0**	**5**
Negative adjustments	0	0	0	0	0
Positive or zero adjustment	5	100	0	0	5
Total	**26**	**100**	**0**	**0**	**26**

During the reporting period, recoveries and financial corrections following the results of ex post controls amounted to EUR 201 038. These recoveries concerned the extensions of audit findings of Horizon 2020 closed audits.

When it comes to the Horizon Europe framework programme, closed audits of SESAR 3 JU beneficiaries (including the extension of audit findings to SESAR 3 JU's beneficiaries launched by other R & I services) did not result in any recoveries ([74]).

The corrective capacity cannot be calculated for 2025 since the recoveries concerned Horizon 2020, whereas the relevant expenditure of the year concerned Horizon Europe.

4.1.1.3 Legality and regularity of the financial transactions

The SESAR 3 JU uses a manual of financial circuits related to budget implementation. The manual establishes the financial circuits within the JU, ensuring the correct implementation of the budget for revenue (through recovery orders and forecasts of revenue) and for expenditure (from the budgetary commitment stage through to payment, decommitment and any applicable recovery orders).

The level of error is the main indicator for assessing whether financial operations have been implemented in compliance with the applicable regulatory and contractual provisions. In 2025, the reported detected error rate stayed below the 2 % materiality threshold defined for Horizon Europe.

([74]) Due to the absence of Horizon Europe recoveries and a detected error rate of 0 %, estimated risk at payment and estimated risk at closure cannot be calculated for 2025.

4.1.1.4 Fraud prevention, detection and correction

The 2023–2026 SESAR 3 JU anti-fraud strategy was adopted by the GB in June 2023 ([75]). An integral aspect of this strategy involves upholding a culture of ethics. In pursuit of this goal, the primary focus of the anti-fraud efforts of the SESAR 3 JU in 2025 centred around awareness raising.

In this context, the SESAR 3 JU organised six anti-fraud awareness-raising sessions, which were mandatory for its staff at all levels of the organisation. These sessions were open to staff from all the other JUs, ensuring resource efficiency, a broader impact and fostering a shared commitment to fraud prevention across multiple entities. This attracted a high level of interest and a total of 240 participants across all six sessions, demonstrating strong engagement with the topic.

In parallel, the SESAR 3 JU participates in the inter-agency working group on anti-fraud and remains updated on the regulatory framework and on new tools developed by the R & I family by attending the FAIR (findable, accessible, interoperable and useful) meetings. The risk of fraud is also considered during the corporate risk workshops.

In accordance with the 2023–2026 SESAR 3 JU anti-fraud strategy, the following indicators report on fraud-related activities.

TABLE 18: **ANTI-FRAUD RELATED INDICATORS IN 2025**

Stage of the anti-fraud cycle	Indicator	Value
Prevention and detection	**Indicator 1:** number of files (suspicions) formally sent to the European Anti-Fraud Office (OLAF) for investigation (regardless of whether these files will be qualified as fraud by OLAF).	n/a
	Indicator 2: number of information sessions, meetings and training sessions on anti-fraud issues.	6
Investigation	**Indicator 3:** time elapsed between the receipt by staff or management of the first information on alleged internal fraud and its transmission to OLAF.	n/a
	Indicator 4: time elapsed between an OLAF request for information and the date of its provision.	12 working days
Correction	**Indicator 5:** time elapsed between receipt of an OLAF report and the decision on recovery or disciplinary sanctions by the SESAR 3 JU.	n/a
	Indicator 6: average time elapsed between the sending of the reasoned debit note and the recovery, following OLAF's report.	n/a
	Indicator 7: amount recovered relative to the amount recommended for recovery by OLAF (percentage).	n/a

4.1.1.4.1 Follow-up of recommendations issued by the European Anti-Fraud Office

There are no recommendations issued by OLAF to follow up on. In May 2024, OLAF received information about alleged irregularities concerning a beneficiary in the implementation of a closed SESAR 2020 project. Since then, OLAF has opened an investigation, which is ongoing at the time of reporting. The SESAR 3 JU is not involved in the investigation itself but has provided information to OLAF upon request.

4.1.1.5 Assets and information, reliability of reporting

Physical assets are recorded in ABAC Assets, while information assets are stored since 2024 in Ares and otherwise on a contractor-provided platform (for information assets shared with external parties).

The annual inventory of the SESAR 3 JU's assets took place between 24 June 2025 and 20 August 2025. The results of the inventory exercise helped clean the inventory situation in ABAC Assets, before ABAC Assets data were transferred to SUMMA by 31 December 2025.

([75]) Decision GB(D)09-2023 – SESAR 3 JU's anti-fraud strategy 2023–2026, signed on 26 June 2023.

4.1.2 Efficiency of controls ('time to')

The three efficiency indicators required by the financial regulation are time to inform, time to grant (both Article 194(2)) and time to pay (Article 116(1)). Time to inform represents the time needed to manage the evaluation and selection phase from the call deadline to informing the participants. Time to grant represents the time between the call deadline and the grant signature. Time to pay represents the outcome of the process for the payment of costs claimed by beneficiaries. In 2025, compliance with these indicators was as follows.

TABLE 19: **EFFICIENCY OF CONTROLS ('TIME TO') INDICATORS IN 2025**

Process	Reference	Result (days)	Target (days)	On time
Time to inform	n/a in 2025 ([76])			
Time to grant				
Time to pay	ER1 + IR1 + ER2 (2025 only)	58	90	100 %

4.1.3 Economy of controls

In 2025, the cost of *ex ante* and *ex post* controls as a percentage of annual expenditure was 1.85 %. The total cost is calculated in terms of full-time equivalents (FTEs) performing the control activities for Horizon Europe grants. It is slightly higher compared to 2024 (1.56 %) because the Grant Management Team was operating at full capacity in 2025. Details for each sector of control are provided in Table 20.

TABLE 20: **COST OF CONTROLS, 2025**

Sector	Estimated FTEs allocated to controls	Cost (EUR)
Grant management	2.8	562,420.00
Finance	0.75	159,450.00
Total *ex ante* controls	**3.55**	**721,870.00**
Ex post controls	0.3	65,370.00
Total	**3.85**	**787,240.00**

Budget 2025	Payments (EUR)	Percentage of total budget
Administrative expenditure	10,514,914.44	25 %
Operational expenditure	32,013,717.86	75 %
Total	**42,528,632.30**	**100 %**

Estimated cost of controls (EUR)		Cost as a percentage of annual expenditure
Costs of *ex ante* controls	721,870.00	1.70 %
Costs of *ex post* controls	65,370.00	0.15 %
Total	**787,240.00**	**1.85 %**

([76]) Time to inform and time to grant for IR2 and ER3 will be included in the 2026 CAAR – the process is ongoing.

4.1.4 Register of exceptions and non-compliance events

The SESAR 3 JU keeps an exceptions and non-compliance events register to ensure that all instances of overriding of controls or deviations from established processes and procedures are documented in exception reports, duly approved by the executive director and logged centrally.

In 2025, following the introduction of Ares within its organisation and the adoption of the executive director decision on the internal control framework ([77]), the SESAR 3 JU updated its exceptions and non-compliance events register management process [78].

Accordingly, in 2025, the SESAR 3 JU recorded three non-compliance events in accordance with the abovementioned policy and process. These events resulted respectively from:

- the signature of a budgetary commitment not preceded by a financing decision for the organisation of the SESAR Innovation Days 2026;
- the payment of an amount (EUR 2 250.43) above the initially agreed amount under a specific contract for the organisation of the Airspace World 2025; and
- the signature of four financial and legal commitments in two different financial years (2024 and 2025) for the provision of professional staff organisations' advisory services.

The exceptions and non-compliance events register is available on request and is consulted by the ECA during audits.

4.1.5 Conclusion on the cost-effectiveness of controls

Overall, the controls present in the JU have been effective, leading to the effective accomplishment of goals, safeguarding the assets of the JU and ensuring the accuracy and reliability of data and the legality and regularity of the financial transactions.

4.2 Audit observations and recommendations

This section briefly sets out the state of play for all audit observations and recommendations reported by auditors related either to performance aspects or to internal control and financial management.

4.2.1 Internal Audit Service

In 2025, the IAS of the European Commission performed an audit on the in-kind contribution validation process (designed under Horizon Europe) set up by the SESAR 3 JU. The audit covered the governance, risk management and control systems in place in the CBE JU, the SESAR 3 JU and the Clean Aviation JU for the in-kind contribution management process and the methodological and IT support provided to the JUs by DG Research and Innovation.

([77]) Executive director decision S3JU/ED/079 of 13 May 2025.
([78]) Executive director decision S3JU/ED/080 of 16 May 2025.

The auditors concluded that these elements are adequately designed and effectively implemented in the SESAR 3 JU and ensure compliance with the regulatory framework. They also acknowledged the following strengths:

- the SESAR 3 JU regularly presents at the meetings of the Governing Board and the Programme Committee the timelines and progress in submitting the IKAA plans and reports, the state of play of the IKAA plans and reports and the recent developments in the IKAA tool;
- the SESAR 3 JU developed guidelines for members and staff for the management of in-kind contributions;
- the SESAR 3 JU regularly organised workshops with the members to present the IKAA tool and the IKAA planning and reporting specificities.

While the audit did not result in the identification of any critical or very important issues, the auditors identified four risks, which relate to the management of IKOP, the process to handle IKAA plans and reports and the monitoring of in-kind contributions, and issued four recommendations accordingly. The four recommendations were accepted by SESAR 3 JUJU management. To address these recommendations and underlying risks, the SESAR 3 JU set up an action plan, composed of 12 specific actions, which was approved by the IAS. At the time of the reporting, good progress had been achieved on several actions, and full implementation is expected during 2026.

Furthermore, all recommendations stemming from previous IAS audits are formally closed.

4.2.2 Internal Audit Capability

In 2025, the Internal Audit Capability (IAC) performed engagements and coordination activities in line with its 2025 annual audit plan ([79]). These activities did not lead to any recommendations.

The work of the IAC focused on consulting engagements, anti-fraud-related activities and the coordination of the work of the IAS, the ECA and other relevant audit bodies. In this context, the IAC provided advice on efficient and effective management, ethics and delegations of authority and ABAC user authorisations. The IAC also provided training to 240 staff members from all JUs on how to prevent, detect and react in case of fraud. Furthermore, it monitored the implementation of past recommendations, followed-up on the discharge procedure and represented the JU in anti-fraud and audit-related networks.

4.2.3 Audit of the European Court of Auditors

During 2025, the ECA audited the SESAR 3 JU's 2024 accounts. In the final audit report ([80]), the ECA provided an unqualified opinion on the SESAR 3 JU and concluded that the JU's accounts fairly present its financial position, the results of its operations, its cash flows and the changes in net assets for 2024, and that the revenue and payments underlying the accounts for 2024 are legal and regular in all material respects.

The report also presents an overview of the results for all JUs for the 2024 financial year. The ECA issued unqualified audit opinions on the reliability of the annual accounts of the twelve JUs. It issued six recommendations to the JUs, among which two relate directly to the SESAR 3 JU (see Table 21). The four other recommendations are not addressed to the SESAR 3 JU.

Additionally, in the chapter dedicated to the SESAR 3 JU, the ECA makes observations on budgetary management, highlighting weaknesses in budget planning and implementation for administrative expenditure. It also reports observations on the legality and regularity of transactions and management and control systems.

([79]) Decision GB(D)12-2024 – Approval of the Internal Audit Capability annual audit plan for the year 2025.
([80]) European Court of Auditors, *Annual report on EU joint undertakings for the 2024 financial year*, Publications Office of the European Union, Luxembourg, 2025, https://data.europa.eu/doi/10.2865/4484971.

TABLE 21: **EUROPEAN COURT OF AUDITORS' AUDITS AND ACCEPTED RECOMMENDATIONS**

Year of reporting	Audit title	Accepted recommendation	State of play in 2025	Impact on the assurance for 2025
2024	Audit of the accounts 2023 ([81])	n/a: in this report, the ECA suggests six actions for several JUs, however, these are not addressed to the SESAR 3 JU.	☑	☑
2025	Audit of the accounts 2024 ([82])	When planning their administrative payments budget for 2027, the SESAR 3, Clean Hydrogen and Global Health EDCTP3 JUs should proactively take account of the volume of unused administrative appropriations they had already accumulated by the end of 2024. Deadline for implementation: end of 2026.	📝	☑
		SESAR 3 JU should cooperate with EUROCONTROL to increase their contributions and monitor progress on a yearly basis to ensure Eurocontrol's 2021–2027 MFF target can be achieved. Deadline for implementation: mid 2026.	📝	☑

State of play		Assurance	
☑	Action plan implemented	☑	No impact on the assurance
⏳	Action plan implementation is ongoing	⚑	Impact on the assurance
📝	Preparation of the action plan		

4.2.4 Follow-up of observations from the discharge authorities

4.2.4.1 Discharge for the 2023 and 2024 financial years

In May 2025, the European Parliament granted discharge to the SESAR 3 JU in respect to the implementation of the budget for the 2023 financial year and approved the closure of the 2023 accounts.

In its resolution, the European Parliament welcomes the clean opinion from the ECA and acknowledges the significant role of the JUs in advancing the EU's strategic goals. However, it expresses concerns about low payment execution in areas such as infrastructure and the accumulation of unused funds.

Among the issues identified across all JUs are missed member contribution targets, grant management errors, and inadequate disaster recovery and ethics policies. The European Parliament also stresses the importance of fair staffing practices, gender balance, and diversity reporting. Finally, JUs are encouraged to better promote their work, strengthen collaboration with SMEs and universities and align more closely with EU strategic priorities, particularly digital sovereignty.

In Q3 2025, the SESAR 3 JU formally acknowledged these observations, outlining the measures it intends to adopt to address them. The full discharge report and the reply of the SESAR 3 JU are published on the website of the European Parliament ([83]).

The discharge decision in respect to the implementation of the budget for the 2024 financial year was given on 29 April 2026.

([81]) European Court of Auditors, *Annual report on EU joint undertakings for the 2023 financial year*, Publications Office of the European Union, Luxembourg, 2024, https://data.europa.eu/doi/10.2865/728019.
([82]) European Court of Auditors, *Annual report on EU joint undertakings for the 2024 financial year*, Publications Office of the European Union, Luxembourg, 2025, https://data.europa.eu/doi/10.2865/4484971.
([83]) The text adopted by the European Parliament is available on their website. The reply of the SESAR JU, entitled 'Follow-up report for the financial year 2023', is also available on the website of the European Parliament.

4.3 Assessment of the effectiveness of internal control systems

4.3.1 Continuous monitoring

The Commission has adopted an internal control framework based on the highest international standards – i.e. the Committee of Sponsoring Organizations of the Treadway Commission internal control integrated framework, the golden standard for internal control systems. Based on the internal control framework of the European Commission, the SESAR 3 JU's internal control framework is adapted to its specific characteristics and organisational structure. The internal control systems are suited to achieving its policy and internal control objectives in accordance with the internal control principles, having due regard to the risks associated with the environment in which it operates.

In view of the annual self-assessment and monitoring of the effectiveness of the control activities required by the internal control framework, the JU developed indicators for all 17 internal control principles and related characteristics. The SESAR 3 JU continuously monitors the indicators and performs assessments on a yearly basis to identify areas for improvement. During the reporting year, management assessed the effectiveness of the internal control system and its results with the following processes: self-assessment, register of exceptions, analysis of internal control weaknesses, non-compliance events recorded during the year, risk assessment, relevant audit results, recommendations of the Court of Auditors or other supervisory bodies, and other supervisory reports.

The SESAR 3 JU used these indicators to run the assessment for 2025. The result of the assessment for 2025 is available in Annex 6.

All indicators have been fully implemented, with the exception of four that remain slightly below target and for which implementation is ongoing.

One indicator concerns participation in the corporate training course on ethics (C1P01-01), which focused on anti-fraud awareness. While 100 % of management and 80 % of invited staff members completed the training, this falls just short of the 100 % target. However, when considering the attendance over a period of five years, the 100 % target has been reached.

As for the remaining three indicators, they relate to quality management and internal control. In December 2024, the SESAR 3 JU signed a contract for the provision of quality, information and document management services. Significant progress was made in the preparatory works carried out in 2025, which will be implemented in the course of 2026.

None of these indicators currently represent a level of criticality that would negatively affect the organisation or undermine the declaration of assurance.

In conclusion, the SESAR 3 JU assessed its internal control system during the reporting year and has concluded that it is effective and the components and principles are present and are functioning as intended.

4.3.2 Risk assessment and management

Risk management aims to enable an organisation to fulfil its mission and objectives in the most efficient and effective way by ensuring the timely and adequate identification, assessment (analysis and evaluation), management (treatment and escalation, as required), monitoring and controlling of the risks and opportunities.

The risk assessment exercise carried out in 2025 identified potential risks that could be detrimental to achieving the JU's objectives. These risks were included in the risk register, and the most significant ones were included in the 2026–2027 BAWP. The two risks included are linked to the following.

- The lack of resources and time to complete the development of phase D by 2030, due to the increased ambition in Phase D's scope. This could negatively affect the launch of the last wave of calls (ER4 and IR3).
- The insufficient level of coordination and harmonisation of SDO deployment. This could negatively affect the delivery of proposals for regulatory measures to implement the SDOs.

Following the entry into force of the cybersecurity regulation of December 2023 ([84]), the SESAR 3 JU has identified seven new risks linked to potential cybersecurity threats.

All these risks were included in the risk register, together with proposed mitigating actions for implementation and follow up in 2026.

In the fourth quarter of 2022, the SESAR 3 JU performed its most recent fraud risk assessment. The most significant risks documented in the stand-alone fraud risk register were considered in the corporate risk assessment.

Both the risk register and the fraud risk register are available to auditors on request.

4.3.3 Prevention of conflicts of interest

In December 2021, the SESAR 3 JU GB adopted rules on confidentiality and the prevention, avoidance and management of conflicts of interest ([85]). These set out the rules specific to GB members, SC members, SRG members, members of other advisory or working groups, staff members, other members of the SESAR 3 JU workforce, consultants and external experts. In 2025, the SESAR 3 JU conducted an exercise in which all staff members were asked to disclose any personal interests through a written declaration with a deadline at the end of September 2025. The evaluation of these declarations has been performed in Q1 2026.

4.4 Conclusion on the assurance

On the basis of the above elements, management provides reasonable assurance that all necessary internal control procedures are in place to guarantee the legality and regularity of the SESAR 3 JU's activities, in line with the principles of economy, efficiency and effectiveness.

In conclusion, management provides reasonable assurance that, overall, suitable controls are in place and are working as intended, risks are being appropriately monitored and mitigated, and necessary improvements and reinforcements are being implemented.

Therefore, the Executive Director, in his capacity as authorising officer, has signed the declaration of assurance presented in Section 4.5.2.

([84]) Regulation (EU, Euratom) 2023/2841 of the European Parliament and of the Council of 13 December 2023 laying down measures for a high common level of cybersecurity at the institutions, bodies, offices and agencies of the Union (OJ L, 2023/2841, 18.12.2023, ELI: http://data.europa.eu/eli/reg/2023/2841/oj).

([85]) Decision GB(D)03-2021 – Adopting the rules on confidentiality, prevention, avoidance and management of conflicts of interest of the SESAR 3 Joint Undertaking.

4.5 Statement of assurance

4.5.1 Assessment of the 2025 consolidated annual activity report by the Governing Board

The Governing Board assessed the 2025 CAAR at its meeting on 29 June 2026 and highlighted the following features:

The Governing Board

welcomes the overall progress achieved in implementing the 2024–2025 Bi-Annual Work Programme, confirming the SESAR 3 JU's capacity to deliver on the ambitions of the European ATM Master Plan 2025 and to advance the Digital European Sky programme in a coherent and coordinated manner;

commends the efforts undertaken to prepare the next phase of ATM modernisation in Europe, in particular through the initiation of the Common Project 2 (CP2) proposal and the development of the Aviation Research and Innovation Strategy (ARIS), as key building blocks for the future of the partnership under the next Multiannual Financial Framework;

recognises the JU's role in mobilising the European aviation community, as reflected in the strong participation in the ER3 and IR2 calls and the continued engagement of stakeholders across the full ATM value chain;

welcomes the continued delivery of results from the Digital European Sky programme, supporting the maturation of SESAR solutions and their transition towards operational deployment;

notes that the foreseen Digital Sky Demonstrator call (DSD4) did not materialise, and highlights the importance of ensuring sustained EU support to demonstration and deployment activities, which are essential to advancing the operational implementation of SESAR solutions;

acknowledges the continued efforts to develop synergies with EU, national and regional initiatives, to enhance coordination and alignment across the European ATM ecosystem;

acknowledges the JU's contribution to international cooperation and global interoperability, notably through its active engagement with the International Civil Aviation Organization (ICAO) and **welcomes** the alignment between the European ATM Master Plan and the Global Air Navigation Plan (GANP);

welcomes the positive outcome of the Horizon Europe interim evaluation, confirming the SESAR 3 JU's performance, added value and cost-effectiveness, including its capacity to leverage significant public and private investment;

encourages members to uphold their commitments by ensuring the timely declaration and certification of in-kind contributions in line with the Single Basic Act;

expresses satisfaction with the effective management of operations, including compliance with Horizon Europe targets, sound financial management, and the absence of critical audit recommendations or major risks, confirming the robustness of the internal control and assurance framework;

welcomes the efficiency gains achieved through the use of back-office arrangements (BOA) and the continued digitalisation of internal processes, contributing to streamlined and effective operations;

invites the SESAR 3 JU to continue advancing its environmental sustainability objectives, including progress towards the implementation of the eco-management and audit scheme (EMAS), in cooperation with EUROCONTROL.

Consequently, based on the information provided, the Governing Board concluded that the 2025 CAAR accurately and adequately reflects the implementation of the 2025 activities from both an operational and administrative point of view, and that the objectives for 2025 as outlined in the 2024-2025 BAWP have been met in compliance with the principles of legality and regularity of operations.

4.5.2 Declaration of assurance

I, the undersigned, Executive Director of the SESAR 3 JU,

In my capacity as authorising officer by delegation,

Declare that the information contained in this report gives a true and fair view.

State that I have reasonable assurance that the resources assigned to the activities described in this report have been used for their intended purpose and in accordance with the principles of sound financial management, and that the control procedures put in place give the necessary guarantees concerning the legality and regularity of the underlying transactions.

This reasonable assurance is based on my own judgement and on the information at my disposal, such as the results of the self-assessment, *ex post* controls, the work of the Internal Audit Capability, the observations of the Internal Audit Service and the lessons learnt from the reports of the European Court of Auditors for years prior to the year of this declaration.

Confirm that I am not aware of anything not reported here which could harm the interests of the joint undertaking ([86]).

Brussels, 29 June 2026

(signed)

Andreas Boschen

Executive Director

SESAR 3 Joint Undertaking

([86]) As explained in Section 4.1.1.2.3, the SESAR 3 JU takes note of the reservation on the error rate expressed by Commission Services at Horizon Europe programme level. However, based on the estimated amount at risk, no reservation is necessary at SESAR 3 JU level.

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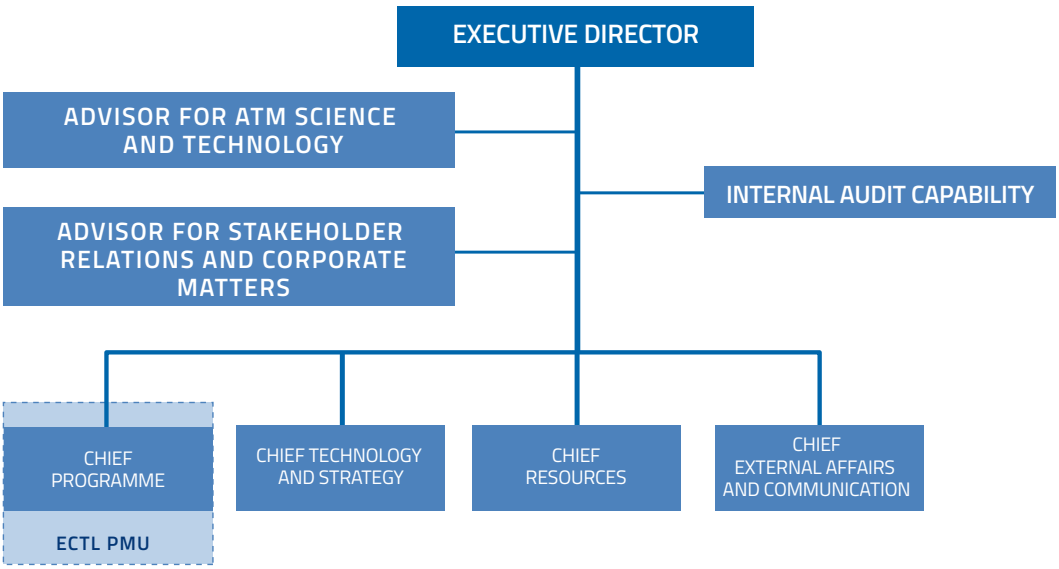
Annexes

1. Organisational chart

Figure A1 shows the organisational structure of the Programme Office as approved by the GB in March 2023 ([87]) and in force during 2025.

FIGURE A1: **ORGANISATIONAL STRUCTURE OF THE PROGRAMME OFFICE**



([87]) Decision GB(D)04-2023 on the organisational structure of the Programme Office.

2. Staff establishment plan, contract agents, seconded national experts

TABLE A1: **STAFF ESTABLISHMENT PLAN, 2025**

Function group and grade	Authorised		Actually filled as of 31 December 2025	
	Permanent posts	Temporary posts	Permanent posts	Temporary posts
AD 16	—		—	
AD 15	—		—	
AD 14	—	1	—	1
AD 13	—	2	—	1
AD 12	—	3	—	4
AD 11	—	5	—	1
AD 10	—	2	—	3
AD 9	—	7	—	7
AD 8	—	6	—	6
AD 7	—	3	—	5
AD 6	—	2	—	
AD 5	—		—	3
Total AD		**31**		**31**
AST 11	—		—	
AST10	—		—	
AST 9	—	1	—	1
AST 8	—		—	
AST 7	—	1	—	
AST 6	—	1	—	1
AST 5	—	2	—	
AST 4	—	1	—	2
AST 3	—		—	1
AST 2	—		—	
AST 1	—		—	
Total AST		**6**		**5**

AST/SC 6	—		—	—
AST/SC 5	—		—	—
AST/SC 4	—		—	—
AST/SC 3	—		—	—
AST/SC 2	—		—	—
AST/SC 1	—		—	—
Total AST/SC				
Total AD + AST + AST/SC	**0**	**37**	**0**	**5**
Grand total		**37**		**36**

NB: AD: administrator; AST: assistant; SC: secretary.

TABLE A2: CONTRACT AGENTS

Function group	Authorised	Actually filled as of 31 December 2025
Function group IV	1	1
Function group III	1	1
Function group II		
Function group I		
Total	**2**	**2**([88])

TABLE A3: SECONDED NATIONAL EXPERTS

Seconded national experts	Authorised	Actually filled as of 31 December 2025
	2	1
Total	**2**	**1**

([88]) One contract agent is financed from third country contribution.

3. Scoreboard of Horizon Europe common key impact pathway indicators

This annex is based on Annex V to Regulation (EU) 2021/695.

The midterm and long-term KIPs are not included in Table A4 as data is not yet available at this stage of the program.

TABLE A4: **SCOREBOARD OF HORIZON EUROPE COMMON KIPs**

Key impact pathway	Short term	Detail per action or globally for 2025 [a]
Towards scientific impact		
1. Creating high-quality new knowledge	Publications: number of peer-reviewed scientific publications resulting from the programme.	21
2. Strengthening human capital in R & I	Skills: number of researchers involved in upskilling (training, mentoring/coaching, mobility and access to R & I infrastructures) activities in projects funded by the programme.	1 008 (28.77 % women; 71.13 % men; 0.20 % non-binary)
3. Fostering diffusion of knowledge and open science	Shared knowledge: share of research outputs (open data/ publication/software etc.) resulting from the programme shared through open knowledge infrastructures.	56.25 %
Towards societal impact		
4. Addressing EU policy priorities and global challenges through R & I	Results: number and share of results aimed at addressing identified EU policy priorities and global challenges, including sustainable development goals (multidimensional: for each identified priority).	EC priorities: 68 projects; 0.30% of total Climate score: 29 projects; 0.13% of total SDG: 51 projects; 0.23% of total
5. Delivering benefits and impact through R & I missions	R & I mission results: results in specific R & I missions (multidimensional: for each identified mission).	n/a
6. Strengthening the uptake of R & I in society	Co-creation: number and share of projects funded by the programme where EU citizens and end users contribute to the co-creation of R & I content.	66 projects 39 signed grants 59 %
Towards technological/economic impact		
7. Generating innovation-based growth	Innovative results: number of innovative products, processes or methods resulting from the programme (by type of innovation), and intellectual property rights applications.	28 innovative products 0 intellectual property rights
8. Creating more and better jobs	Supported employment: number of FTE jobs created, and jobs maintained in participating legal entities for the project funded by the programme (by type of job).	1 152.71 FTE
9. Leveraging investments in R & I	Co-investment: amount of public and private investment mobilised with the initial investment from the programme.	EUR 171.6 million

[a] Figures in this column are reporting on the short-term KIPs. They have been extracted from the Horizon Europe Dashboard on 8 March 2026. The calculation follows the methodology presented in the indicator methodology and metadata handbook.

4. Horizon Europe Partnership common key performance indicators

This annex is based on Section 5 and Appendix 1 to the Commission experts' report *A robust and harmonised framework for reporting and monitoring European partnerships in Horizon Europe – First interim report.*

TABLE A5: HORIZON EUROPE PARTNERSHIP COMMON INDICATORS

No	Criterion addressed	Proposed common indicators	Baseline	Results for 2025	2027 target
1	**Additionality**	Progress towards (financial and in-kind) contributions from partners other than the Union – i.e. committed v actual ([a])	0	Total contributions: EUR 565,77 million Financial contributions: EUR 17,4 million: IKOP: EUR 118,834 million IKAA: EUR 429,536 million	EUR 1 billion
2	**Additionality/ synergies**	Additional investments triggered by the EU contribution, including qualitative impacts related to additional activities (AA) ([b])	0	-	–
3	**Directionality**	Overall (public and private, in-kind and cash) investments mobilised towards EU priorities	n/a	100 % of investments focused on 'A new plan for Europe's sustainable prosperity and competitiveness' and 'A new era for European defence and security'	n/a
4	**International visibility and positioning**	International actors involved ([c])	n/a	Six unique participants (eight participations) ([d])	n/a
5	**Transparency and openness**	Share and type of stakeholders and countries invited/ engaged ([e])	n/a	1 235	n/a
6	**Transparency and openness**	Number and types of newcomer members of partnerships and their countries of origin (geographical coverage)	55 ([f])	55	n/a
7	**Transparency and openness**	Number and types of newcomer beneficiaries in funded projects (in terms of types and countries of origin) ([g])	n/a	142 newcomers (details in Table A6)	n/a
8	**Coherence and synergies**	Number and types of coordinated and joint activities with other European partnerships	n/a	0 coordinated calls for proposals 6 systematic collaborations 4 ad hoc collaborations	n/a
9	**Coherence and synergies**	Number and types of coordinated and joint activities with other R & I initiatives at the EU/national/regional/ sectoral level	n/a	0 coordinated calls for proposals 0 co-funding 2 MoCs / memoranda of understanding 17 ad hoc collaborations 13 various activities	n/a

No	Criterion addressed	Proposed common indicators	Baseline	Results for 2025	2027 target
10	**Coherence and synergies**	Complementary and cumulative funding from other EU funds (Horizon Europe, European Regional Development Fund, Recovery and Resilience Facility, other cohesion policy funds, CEF, digital Europe programme, programme for the environment and climate action, etc.) and national funding ([h])	n/a	62 %	n/a
11	**International visibility and positioning**	Visibility of the partnership in national, European and international policy/industry cycles ([i])	n/a	2 international events hosted 50 events attended 7 digital assets produced 16 publications and articles 179 newsletters/items 1340 social media posts	n/a

([a]) This KPI measures the amount of IKAA, IKOP and in-cash contributions as per the reporting deadline of 31 May of the reporting year + 1. The target of EUR 1 billion is to be reached by the end of the programme.
([b]) This KPI is measured and reported by the projects in their final reports. Therefore, nothing will be reported on this KPI before the closure of the first ER1 and IR1 projects.
([c]) This KPI measures the entities participating in ongoing SESAR JU projects that are from neither a Member State nor an associated country to Horizon Europe on 31 December 2025.
([d]) This figure presents the current participation in all ongoing projects funded under ER1, ER2 and IR1 on 31 December 2025.
([e]) This KPI measures the participations in the SESAR 3 JU calls for proposals funded under Horizon Europe in the reporting year. The breakdown by type of entity and country is provided in Section 1.3.1.
([f]) The baseline is the number of members at the creation of the SESAR 3 JU. The figure provided is not cumulative. It represents the number of JU members on 31 December 2025.
([g]) For this KPI, newcomers are defined as entities that did not participate in SESAR 2020 projects.
([h]) This indicator is cumulative since the beginning of the SESAR 3 JU.
([i]) The activities reported in this KPI are further developed and detailed in Section 2.1.

TABLE A6: **KPI 7 – NUMBERS AND TYPES OF NEWCOMER BENEFICIARIES IN FUNDED PROJECTS (BY TYPES AND COUNTRIES OF ORIGIN) IN 2025 (ER1, ER2 AND IR1)**

Country code	Country	Higher education institutions	Private for-profit companies	Public bodies	Research organisations	Other	Total
AT	Austria		3				3
BE	Belgium	1	15		3	6	25
BR	Brazil				1		1
CA	Canada					1	1
CH	Switzerland		2				2
CZ	Czechia				1		1
DE	Germany	2	11		1		14
DK	Denmark		2				2
EE	Estonia		3	1			4
EL	Greece		4	1	1		6
ES	Spain	1	14	1	1	1	18
FI	Finland		1		1		2
FR	France	1	10		1		12
IE	Ireland		3				3
IL	Israel		1				1
IS	Iceland		1				1
IT	Italy	1	14	1	1		17
LT	Lithuania				1		1
LU	Luxembourg					1	1
LV	Latvia		1				1
MT	Malta	1					1
NL	Netherlands	1	2	1			4
NO	Norway		1				1
PT	Portugal	1	1				2
RO	Romania				1		1
SG	Singapore	1					1
SK	Slovakia	1	1				2
TR	Türkiye		3	1			4
UA	Ukraine		1				1
UK	United Kingdom	3	3				6
US	United States		1	1		1	3
	Total	**14**	**98**	**7**	**13**	**10**	**142**

5. Scoreboard of key performance indicators specific to the SESAR 3 JU

TABLE A7: **SESAR 3 JU KPI SCOREBOARD**

KPI name	Unit of measurement	Baseline	Result for 2025	Target for 2027	Ambition beyond 2027
Resources (input), processes and activities [a]					
Signed grants	Number	0	68	140	140
Calls capturing synergies with other EU programmes and initiatives	Number	0	5	10	10
Complementary funding (mainly the CEF)	Million EUR	0	144	400	600
Partners' contribution	Million EUR	0	566	700	1 000
Outcomes					
Solutions delivered at TRL6+	Number	0	8	56	TBC
Progress in delivering development activities at TRL6 against phases C and D of the European ATM Master Plan	%	C: 66 [b] D: 0	C: 66 D: 0	C: 97 D: TBC	C: 100 D: TBC
Solutions with supporting standards and regulations [c]	Number	0	7	36	TBC
Market uptake of phase C	%	0	33	TBC	TBC
Impacts [d]					
Airspace capacity (en route and TMA)	%	8.5 million flights	TBC	+ 60	+ 100 to 140
Airport capacity	%	17.9 million movements	TBC	+ 15	+ 16 to 20
Environment (fuel reduction)	Kilograms of fuel per flight	6 400	TBC	– 109	– 600
	%	—	TBC	– 1.6	– 9.3
Passenger time saving (departure punctuality)	Minutes per flight	18	TBC	– 0.9	– 7 to 9
Cost-efficiency (air navigation services cost reduction)	EUR per flight	1 077	TBC	– 164	– 209

[a] Except for the KPIs measured in %, the figures reported under 'Resources (input), processes and activities' and 'Outcomes' are cumulative.
[b] For this indicator, the baseline is 2023.
[c] Solutions at TRL6+.
[d] The baseline for the 'Impacts' indicators is 2023, as indicated in the 2025 European ATM Master Plan.

6. Assessment of the internal control system

TABLE A8: **ASSESSMENT OF THE SESAR 3 JU INTERNAL CONTROL SYSTEM IN 2025**

ID	Source	Control description	Type	Target	Measured value [a]	Measurement frequency	Date of latest measurement
Control environment							
1. The SESAR 3 JU demonstrates a commitment to integrity and ethical values							
C1P01-01	DG Budget	Percentage of managers/staff who participated in the SESAR 3 JU corporate training course on ethics.	Min. %	100 %	80 %	Yearly	31 December 2025
C1P01-02	DG Budget	An annual reminder about declaring conflicts of interest was sent to all managers and staff.	Score (0–3) [b]	3	3	Yearly	31 December 2025
C1P01-03	SESAR 3 JU	A code of conduct / ethical guidance exists and all staff members have access to it via the information and document management system.	Score (0–3)	3	3	Yearly	31 December 2025
CP1P01-04	SESAR 3 JU	Background verification checks (criminal records, fraud records, etc.) on all candidates to become personnel are carried out prior to them joining the organisation and on an ongoing basis.	Score (0–3)	3	3	Yearly	31 December 2025
2. The board demonstrates independence from management and exercises oversight of the development and performance of internal control							
C1P02-01	DG Budget	The SESAR 3 JU provides information and participates in regular coordination mechanisms so that the Commission, and in particular DG Mobility and Transport, exercises effective oversight of the SESAR 3 JU's activities.	Score (0–3)	3	3	Quarterly	31 December 2025
C1P02-02	SESAR 3 JU	GB meetings regularly deal with the topics of risk management, risk allocation and internal control.	Score (0–3)	3	3	Yearly	31 December 2025

ID	Source	Control description	Type	Target	Measured value [a]	Measurement frequency	Date of latest measurement
C1P02-03	SESAR 3 JU	Management has a clear view of the specific activities they are responsible for, in compliance with their job description, and keeps track of the main issues identified.	Score (0–3)	3	3	Yearly	31 December 2025
C1P02-04	SESAR 3 JU	The head of unit in charge of risk management and internal control signs the statement of the head of unit in charge of risk management and internal control. A declaration of assurance is signed annually by the authorising officer.	Score (0–3)	3	3	Yearly	31 December 2025
C1P02-05	SESAR 3 JU	Confidentiality or non-disclosure agreements reflecting the organisation's needs for the protection of information are identified, documented, regularly reviewed, and signed by personnel and other relevant interested parties.	Score (0–3)	3	3	Yearly	31 December 2025
3. Management establishes, with political oversight, structures, reporting lines, and appropriate authorities and responsibilities in the pursuit of its objectives							
C1P03-01	DG Budget	Clear management structures are established and implemented at every level of the organisation, with roles and tasks clearly defined in the financial circuits. The supervisory activities focus particularly on high-risk areas.	Score (0–3)	3	3	Quarterly	31 December 2025
C1P03-02	DG Budget	Each job in the SESAR 3 JU is linked with the SESAR 3 JU's objectives and priorities.	Score (0–3)	3	3	Yearly	31 December 2025
C1P03-03	SESAR 3 JU	Managers have a clear view of the activities within their teams and keep track of the main issues identified through regular team meetings.	Score (0–3)	3	3	Half-yearly	31 December 2025

ID	Source	Control description	Type	Target	Measured value [a]	Measurement frequency	Date of latest measurement
4. The SESAR 3 JU demonstrates a commitment to attracting, developing and retaining competent individuals in alignment with its objectives							
C1P04-01	SESAR 3 JU	The catalogue of training courses takes into account the skills needed at the SESAR 3 JU level, in accordance with the learning and development policy.	Score (0–3)	3	3	Yearly	31 December 2025
C1P04-02	SESAR 3 JU	The SESAR 3 JU complies with the rules on promotion within the organisation, and vacancies are open to internal candidates.	Score (0–3)	3	3	Yearly	31 December 2025
5. The SESAR 3 JU holds individuals accountable for their internal control responsibilities in the pursuit of its objectives							
C1P05-01	SESAR 3 JU	The SESAR 3 JU implements a career development review for SESAR 3 JU staff where: mutual expectations are set and responsibilities are clearly allocated; performance is reviewed and assessed on a yearly basis; reclassification is decided.	Score (0–3)	3	3	Yearly	31 December 2025
C1P05-02	SESAR 3 JU	SESAR 3 JU policies are communicated to staff and appropriate measures to ensure that staff are familiar with them are put in place.	Score (0–3)	3	3	Yearly	31 December 2025
Risk assessment							
6. The SESAR 3 JU specifies objectives with sufficient clarity to enable the identification and assessment of risks relating to these objectives							
C2P06-01	DG Budget	Number of critical and very important recommendations from internal auditors.	Max. number	1	0	Yearly	31 December 2025
C2P06-02	DG Budget	Number of financial/ non-financial exceptions and non-compliance events.	Max. number	4	3	Yearly	31 December 2025
C2P06-03	SESAR 3 JU	The SESAR 3 JU has a mission statement, clearly stated in a formalised document and easily accessible to all.	Score (0–3)	3	3	Yearly	31 December 2025

ID	Source	Control description	Type	Target	Measured value [a]	Measurement frequency	Date of latest measurement
C2P06-04	SESAR 3 JU	The BAWP clearly states the order of priorities among the main tasks in the event of significant changes.	Score (0–3)	3	3	Yearly	31 December 2025
C2P06-05	SESAR 3 JU	The SESAR 3 JU monitors the achievement of objectives through the indicators. Management ensures that all abnormalities in the progress of the objectives' achievement are reported when appropriate.	Score (0–3)	3	3	Quarterly	31 December 2025
7. The SESAR 3 JU identifies risks to the achievement of its objectives across the organisation and analyses risks as a basis for determining how the risks should be managed							
C2P07-01	DG Budget	Management regularly reviews progress towards the specific objectives, and strategic and operational risks in the SESAR 3 JU have been identified/assessed at the appropriate level.	Score (0–3)	3	3	Half-yearly	31 December 2025
C2P07-02	DG Budget	Management puts mitigation plans in place for the risks identified in the risk register, and regularly monitors their implementation.	Score (0–3)	3	3	Half-yearly	31 December 2025
C2P07-03	SESAR 3 JU	The SESAR 3 JU implements risk assessments on a regular basis and records them in a corporate risk register.	Score (0–3)	3	3	Half-yearly	31 December 2025
8. The SESAR 3 JU considers the potential for fraud when assessing risks to the achievement of its objectives							
C2P08-01	DG Budget	The SESAR 3 JU has an up-to-date anti-fraud strategy (not older than three years), which is based on a stand-alone risk assessment.	Score (0–3)	3	3	Yearly	31 December 2025
C2P08-02	DG Budget	Number of opened and ongoing OLAF cases during the reporting year.	Max. number	0	0	Yearly	31 December 2025
C2P08-03	SESAR 3 JU	The SESAR 3 JU informs its staff about the rules relating to conflicts of interest, fraud prevention and reporting of irregularities.	Score (0–3)	3	3	Yearly	31 December 2025

ID	Source	Control description	Type	Target	Measured value [a]	Measurement frequency	Date of latest measurement
9. The SESAR 3 JU identifies and assesses changes that could significantly impact the internal control system							
C2P09-01	SESAR 3 JU	A procedure exists for updating the objectives to take into account significant changes in activities and priorities.	Score (0–3)	3	3	Quarterly	31 December 2025
Control activities							
10. The SESAR 3 JU selects and develops control activities that contribute to the mitigation of risks to the achievement of its objectives to acceptable levels							
C3P10-01	DG Budget	A control strategy exists and has been reviewed/updated, and staff have been made aware of it.	Score (0–3)	3	2	Yearly	31 December 2025
C3P10-02	DG Budget	Number of business continuity exercises performed during the year for which lessons learnt are documented and implemented.	Min. number	0	0	Yearly	31 December 2025
C3P10-03	DG Budget	Number of security exercises performed during the year for which lessons learnt are documented and implemented.	Min. number	1	1	Yearly	31 December 2025
C3P10-04	DG Budget	ABAC access rights are reviewed once a year.	Score (0–3)	3	3	Yearly	31 December 2025
C3P10-05	DG Budget	A list of critical functions exists.	Score (0–3)	3	3	Yearly	31 December 2025
C3P10-06	SESAR 3 JU	The SESAR 3 JU has a business continuity plan.	Score (0–3)	3	3	Yearly	31 December 2025
C3P10-07	SESAR 3 JU	Cybersecurity clauses and provisions are established in third-party contracts and other relevant legal documents.	Score (0–3)	3	3	Yearly	31 December 2025
11. The SESAR 3 JU selects and develops general control activities over technology to support the achievement of its objectives							
C3P11-01	DG Budget	Number of IT security incidents reported during the year with impact on the confidentiality, integrity or availability of information systems.	Max. number	0	0	Monthly	31 December 2025
C3P11-02	SESAR 3 JU	Statistics on system downtime, server capacity and other performance indicators are regularly analysed. System performance issues are reported to the appropriate management level.	Score (0–3)	3	3	Monthly	31 December 2025

ID	Source	Control description	Type	Target	Measured value [a]	Measurement frequency	Date of latest measurement
C3P11-03	SESAR 3 JU	Feedback from IT users regarding system performance is collected and analysed.	Score (0–3)	3	3	Yearly	31 December 2025
C3P11-04	SESAR 3 JU	The SESAR 3 JU has defined and operates an appropriate organisation for the management of the information systems it uses (generally in the form of an IT steering committee). Each information system owned by the SESAR 3 JU possesses a clearly identified business owner (and is overseen by a steering committee). The IT steering committee takes appropriate action if necessary.	Score (0–3)	3	3	Quarterly	31 December 2025
C3P11-05	SESAR 3 JU	SESAR 3 JU ensures that IT infrastructure components are configured, used and regularly updated to align with cybersecurity requirements.	Score (0–3)	3	3	Quarterly	31 December 2025
12. The SESAR 3 JU deploys control activities through corporate policies that establish what is expected and in procedures that put policies into action							
C3P12-01	DG Budget	Exceptions and non-compliance events are systematically reported in the exception register according to defined and documented procedures.	Score (0–3)	3	3	Yearly	31 December 2025
C3P12-02	SESAR 3 JU	A policy, processes and procedures for information security exist, and staff have been made aware of them.	Score (0–3)	3	3	Yearly	31 December 2025
C3P12-03	SESAR 3 JU	A policy, processes and procedures for document management exist, and staff have been made aware of them.	Score (0–3)	3	3	Yearly	31 December 2025
C3P12-04	SESAR 3 JU	A policy, processes and procedures for data protection exist, and staff have been made aware of them.	Score (0–3)	3	3	Yearly	31 December 2025

ID	Source	Control description	Type	Target	Measured value [a]	Measurement frequency	Date of latest measurement
C3P12-05	SESAR 3 JU	A policy, processes and procedures for public access to documents exist, and staff have been made aware of them.	Score (0–3)	3	3	Yearly	31 December 2025
C3P12-06	SESAR 3 JU	Appropriate control procedures are in place for the SESAR 3 JU's main operational and financial processes and for the main ICT systems and services.	Score (0–3)	3	3	Yearly	31 December 2025
C3P12-07	SESAR 3 JU	The SESAR 3 JU main processes are defined and described/ documented and are applied in practice.	Score (0–3)	3	2	Half-yearly	31 December 2025
Information and communication							
13. The SESAR 3 JU obtains or generates and uses relevant quality information to support the functioning of internal control							
C4P13-01	SESAR 3 JU	The SESAR 3 JU implements a quality policy and quality manual that includes references to internal control and its monitoring.	Score (0–3)	3	2	Yearly	31 December 2025
C4P13-02	SESAR 3 JU	SESAR 3 JU implements control and monitoring at the IT infrastructure level to identify and prevent any potential deviations from normal operations.	Score (0–3)	3	3	Yearly	31 December 2025
14. The SESAR 3 JU internally communicates information, including objectives and responsibilities for internal control, that is necessary to support the functioning of internal control							
C4P14-01	DG Budget	The SESAR 3 JU has an internal communication strategy in place.	Score (0–3)	3	3	Yearly	31 December 2025
C4P14-02	SESAR 3 JU	Regular team meetings and staff briefings take place to share information within and among the teams at various levels.	Score (0–3)	3	3	Quarterly	31 December 2025
C4P14-03	SESAR 3 JU	Arrangements are in place to ensure that management and staff are informed of other units', departments' or the SESAR 3 JU's decisions/projects/ initiatives that may affect their responsibilities and tasks.	Score (0–3)	3	3	Half-yearly	31 December 2025

ID	Source	Control description	Type	Target	Measured value [a]	Measurement frequency	Date of latest measurement
15. The SESAR 3 JU communicates with external parties about matters affecting the functioning of internal control							
C4P15-01	DG Budget	Communication activities are aligned with the European Commission's political priorities.	Score (0–3)	3	3	Half-yearly	31 December 2025
C4P15-02	DG Budget	The chief communication and external affairs brings the communication planning to the Corporate Management Team for approval.	Score (0–3)	3	3	Yearly	31 December 2025
C4P15-03	DG Budget	An external communication strategy and implementation plan exist.	Score (0–3)	3	3	Yearly	31 December 2025
Monitoring activities							
16. The SESAR 3 JUJU selects, develops and performs ongoing and/or separate assessments to ascertain whether the components of internal control are present and functioning							
C5P16-01	DG Budget	Specific and continuous assessment exercises have been coordinated horizontally in the context of the internal control framework.	Score (0–3)	3	3	Yearly	31 December 2025
C5P16-02	SESAR 3 JU	The SESAR 3 JU performs regular staff surveys (every two to three years) to monitor the commitment and satisfaction of staff.	Score (0–3)	3	3	Yearly	31 December 2025
17. The SESAR 3 JU assesses internal control deficiencies and communicates them in a timely manner to those parties responsible for taking corrective action, including senior management, as appropriate							
C5P17-01	DG Budget	The results of the continuous and specific assessment have been discussed with senior management and the board.	Score (0–3)	3	3	Yearly	31 December 2025
C5P17-02	DG Budget	The results of the continuous and specific assessment of internal controls have been properly disclosed in the CAAR.	Score (0–3)	3	3	Yearly	31 December 2025

(a) Colour shading of cells based on measured value figures: green, measured value equals target; yellow, measured value is slightly less than target but not zero; red, measured value is well below target or is zero.
(b) 0, not implemented; 1, limited implementation; 2, implementation in progress; 3, fully implemented.

7. Statement of the manager in charge of risk management and internal control

I, the undersigned,

Manager in charge of risk management and internal control within the SESAR 3 JU,

In my capacity as manager in charge of risk management and internal control, declare that in accordance with the SESAR 3 JU's internal control framework, I have reported my advice and recommendations on the overall state of internal control in the joint undertaking to the Executive Director.

I hereby certify that the information provided in the present CAAR and in its annexes is, to the best of my knowledge, accurate, reliable and complete.

Brussels, 29 June 2026

(Signed)

Alain Siebert

Chief Technology and Strategy

Head of Unit in charge of Risk Management and Internal Control

SESAR 3 Joint Undertaking

8. In-kind contributions to additional activities report

IKAA REPORTING FOR YEAR 2025

Title	Description	Category	Scope/Type	AA linked to projects	Project acronym	AA linked to programme	Planned value for the year (EUR)	Incurred value for the year (EUR)	Certified value for the year (EUR)	Reported IKAA with pending certification (EUR)
		1. Support to additional R&I					39,502,277	50,280,398	22,499,226	27,781,171
		2. Scale-up of technologies					11,499,382	4,825,644	2,825,619	2,000,025
		3. Demonstrators					23,416,809	29,677,435	12,449,473	17,227,962
		4. Creating new business opportunities					3,475,003	3,386,275	60,705	3,325,570
		5. Training & skilling development					—			—
		6. Contribution to the development of new standards, regulations and policies					7,796,290	8,176,879	7,219,551	957,328
		7. Supporting ecosystem development					23,860,243	16,739,891	9,325,341	7,414,550
		8. Communication, dissemination, awareness raising, citizen engagement					1,019,893	1,333,550	621,668	711,881
		9. Other					51,469,994	54,561,301	28,089,503	26,471,798
		TOTAL					162,039,892	168,981,371	83,091,085	85,890,286

IKAA Category	EUROCONTROL		OTHER MEMBERS		ALL MEMBERS	
	Incurred value (EUR)	Certified value (EUR)	Incurred value (EUR)	Certified value (EUR)	Incurred value (EUR)	Certified value (EUR)
1. Support to additional R&I	10,251,392	10,251,392	40,029,006	12,247,834	50,280,398	22,499,226
2. Scale-up of technologies	490,081	490,081	4,335,563	2,335,538	4,825,644	2,825,619
3. Demonstrators	3,649,329	3,649,329	26,028,107	8,800,144	29,677,435	12,449,473
4. Creating new business opportunities	60,705	60,705	3,325,570	0	3,386,275	60,705
6. Contribution to the development of new standards, regulations and policies	7,127,275	7,127,275	1,049,604	92,275	8,176,879	7,219,551
7. Supporting ecosystem development	3,814,223	3,814,223	12,925,667	5,511,117	16,739,891	9,325,341
8. Communication, dissemination, awareness raising, citizen engagement	587,108	587,108	746,442	34,560	1,333,550	621,668
9. Other			54,561,301	28,089,503	54,561,301	28,089,503
TOTAL	25,980,112	25,980,112	143,001,259	57,110,973	168,981,371	83,091,085

IKAA 2025 Reporting - breakdown per country in EUR		
Country	**Incurred value in 2025**	**Certified value 2025**
Austria	5,507,038	1,237,336
Belgium	26,613,838	25,980,112
Bulgaria	2,775,593	2,775,593
Croatia	2,262,354	2,262,354
Czechia	2,052,253	2,275,785
Denmark	4,419,955	0
Finland	801,496	0
France	13,522,120	5,620,532
Germany	2,599,213	2,580,213
Greece	2,274,808	2,274,808
Ireland	6,325,255	0
Italy	28,408,267	1,579,264
Netherlands	7,220,823	1,983,669
Norway	506,661	0
Poland	10,016,067	0
Portugal	5,830,492	0
Romania	3,054,543	3,054,543
Spain	25,906,295	17,240,677
Sweden	4,795,354	137,232
United Kingdom	14,088,946	14,088,946

Total IKAA 2021–2025 (Evolution value in EUR)		
Planned IKAA	**Reported IKAA with pending certification**	**Certified IKAA**
539,182,440	170,875,356	258,661,333

9. Final annual accounts

The following tables present an extract of the final accounts of the SESAR 3 JU for 2025, which were handed over as a separate document to the budgetary authorities, the ECA and the external auditors. The final annual accounts for 2025 have been published on the SESAR 3 JU website.

1.1. Balance sheet

	Note	31 December 2025	31 December 2024
Non-current assets			
Intangible assets		972	2 592
Property, plant and equipment		97 498	142 254
Long-term pre-financing		145 579	27 804 449
Short-term pre-financing		32 701 477	84 607 077
Exchange receivables and non-exchange recoverables		146 540 271	81 651 002
Cash and cash equivalents			
Total assets		**179 485 797**	**194 207 374**
Short-term provisions			
Payables and other liabilities		187 016 301	131 118 238
Accrued charges and deferred income		9 109 368	23 328 727
Total liabilities		**196 125 669**	**154 446 966**
Contribution from members		3 211 846 909	3 110 459 809
Accumulated deficit		(3 070 699 402)	(2 967 181 607)
Economic result of the year		(157 787 378)	(103 517 794)
Total net assets		**(16 639 871)**	**39 760 407**
Liabilities and net assets		**179 485 798**	**194 207 373**

1.2. Statement of financial performance

	Note	2025	2024
Revenue			
Revenue from non-exchange transactions		**52 601**	**48 441**
Recovery of operating expenses		52 601	48 441
Financial revenues			2 615
Other exchange revenue		4 773	1 590
Total revenue		**57 374**	**52 646**
Operating costs		(147 941 642)	(95 291 075)
Staff costs		(6 213 358)	(5 745 375)
Finance expenses			(3 588)
Other expenses		(3 671 752)	(2 530 403)
Total expenses		**(157 844 752)**	**(103 570 440)**
Economic result of the year		**(157 787 378)**	**(103 517 794)**

1.3. Cash-flow statement

	2025	2024
Economic result of the year	(157 787 378)	(103 517 794)
Operating activities		
Depreciation and amortisation	44 608	59 128
(Increase)/decrease in pre-financing	79 564 469	30 715 210
(Increase)/decrease in exchange receivables and non-exchange recoverables	(64 889 270)	(59 961 109)
Increase/(decrease) in payables	55 898 062	94 320 690
Increase/(decrease) in accrued charges and deferred income	(14 219 359)	560 930
Increase/(decrease) in cash contributions	45 297 399	37 949 016
Increase/(decrease) in in-kind contributions	56 089 701	
Other non-cash movements		
Investing activities		
(Increase)/decrease in intangible assets and property, plant and equipment	1 768	(130 963)
Net cashflow		**(4 893)**
Net increase/(decrease) in cash and cash equivalents		(4 893)
Cash and cash equivalents at the beginning of the year		(4 893)
Cash and cash equivalents at year-end		

1.4. Statement of changes in net assets

	Contribution from members	Accumulated surplus/ (deficit)	Economic result of the year	Net assets
Balance as at 31 December 2023	**3 072 510 792**	**(2 862 431 542)**	**(104 750 065)**	**105 329 185**
Allocation 2023 economic result		(104 750 065)	104 750 065	
Cash contribution	37 949 016			37 949 016
Contribution in kind				
Economic result of the year			(103 517 794)	(103 517 794)
Balance as at 31 December 2024	**3 110 459 809**	**(2 967 181 607)**	**(103 517 794)**	**39 760 407**
Allocation 2024 economic result		(103 517 794)	103 517 794	
Cash contribution	45 297 399			45 297 399
Contribution in kind	56 089 701			56 089 701
Economic result of the year			(157 787 378)	(157 787 378)
Balance as at 31 December 2025	**3 211 846 909**	**(3 070 699 402)**	**(157 787 378)**	**(16 639 871)**

10. Materiality criteria

In Horizon Europe, a new approach is needed, providing additional assurance to compensate for the absence of a JU-specific representative error rate. The assurance for Horizon Europe expenditure is based on the combination of different building blocks of assurance. The building blocks of assurance on which the JU relies encompass both additional risk-specific *ex ante* control measures and risk-based ex post audits, as the JU considers these two elements as closely intertwined. As detailed in DG Budget's 2022 guidelines for determining materiality as regards legality and regularity, the comprehensive analysis of the individual elements of information underlying the different building blocks of assurance allows the responsible authorising officer to identify significant weaknesses in the overall internal control system. The responsible authorising officer, in his/her declaration of assurance, then identifies the overall impact of the weaknesses and judges whether it is material enough that the non-disclosure of a weakness is likely to influence the decisions or conclusions of the users of the declaration of assurance. The declaration of assurance confirms:

1. a true and fair view provided in the (C)AAR and the annual accounts;
2. that resources are used for the intended purpose;
3. the sound financial management applied;
4. the legality and regularity of underlying transactions; and
5. the non-omission of significant information.

For this purpose, the reporting will encompass both qualitative and quantitative elements.

1. *Ex ante* controls

a. Overview of general and targeted information measures taken (e.g. financial workshops).

b. Overview of standard *ex ante* controls and additional risk-based *ex ante* controls for specifically targeted risk groups (e.g. top beneficiaries, SMEs).

c. Any other effective ex ante control measures taken.

2. *Ex post* controls

a. Representative and residual error rate based on the common representative sample (sample at the Horizon Europe programme level): the JUs are part of the R & I family implementing the Horizon Europe programme, and the levels of errors reported at the programme level may give some indication as to what the potential level of errors present in the JU-specific population could be. The materiality threshold for reservations is set at the corporate programme level and described in the Horizon Europe multiannual audit plan. They are also explained in Annex 5 and Annex 7 of DG Research and Innovation's annual activity report.

b. Estimated JU-specific error rate: *ex post* audits and their results are a key tool for assessing the legality and regularity of cost claims validated by the JU's management following *ex ante* controls. In the absence of a JU individual representative error rate for the Horizon Europe programme, contrary to the situation in Horizon 2020, the JU may estimate a JU-specific error rate for its entire population, based on the *ex post* audit results available on its operational expenditure, to feed the JU executive director declaration of assurance, in accordance with the JU's common implementation approach to the Horizon Europe control strategy. This methodology takes account of the multiannual nature of the Horizon Europe programme.

This JU-specific individual error rate allows to estimate (1) the level of error that remains undetected in the JU's Horizon Europe population after *ex ante* controls have been performed and – following the full financial implementation of audit results – (2) the remaining error in the JU's Horizon Europe population. The estimation of a JU-specific error rate on an annual and accumulated, multiannual basis is thus a key element for the JU's annual declaration of assurance and the JU's discharge procedure.

c. Coverage: overview of the percentage of the JU's operational expenditure covered – (i) direct coverage: percentage of JU's expenditure directly audited, for example, cost claims that are part of the JU's risk-based sample, JU's cost claims that are part of the common representative sample, JU's cost claims that are part of a system and processes audit,

and JU's cost claims that are part of the annual ECA sample (DAS audits); (ii) indirect coverage: percentage of the JU's expenditure linked to non-audited cost claims of audited beneficiaries, audited either for the JU or for any other Horizon Europe granting authorities.

d. Results of qualitative assessments of audit results.

e. Results of the implementation of *ex post audits.*

Multiannual approach

The estimation of error rates is closely related to the regular risk assessment that the JU conducts, at the latest at every sampling moment, taking into account all Horizon Europe cost claims paid up to that point that are relevant for the current assurance exercise. Consequently, estimated error rates will reflect the multiannual nature of the Horizon Europe programme ('cumulative error') and any cleaning effect for their risky beneficiaries achieved through error corrections and extensions.

As a result of the multiannual nature of the SESAR 3 JU, the effectiveness of its controls can be fully measured and assessed only in the final stages of the programme's lifetime, once the *ex post* audits have been finalised, the related detected and systemic errors have been corrected, and the internal control procedures have been adjusted to avoid these errors in the future. The JUs' control objective under the Horizon Europe control strategy is to ensure that the error rate for the JU's population after corrections (including extensions) – i.e. the percentage of errors that remain undetected and uncorrected at the end of the programme's implementation – does not exceed 2 % of the JU's total expenditure. This objective for the weighted estimated JU-specific error rate aligns with the objective of the 2 % residual error rate set at the corporate level ([89]).

The 2 % objective is to be assessed from a multiannual perspective as still being a realistic target at the end of the programme's implementation, taking into account the results of indicators for the *ex ante* controls and the implementation level of the *ex post* audit results, the frequency and severity of the errors found, and a sound cost–benefit ratio for the effort needed to detect and correct them.

If the residual error rate is higher than 2 %, a reservation should be made and an additional action plan should be drawn up.

Notwithstanding the multiannual span of the control strategy, the executive director is required to sign a statement of assurance for each financial year. In order to determine whether this statement of assurance should be qualified with a reservation, the effectiveness of the control systems in place needs to be assessed not only for the year of reference, but also from a multiannual perspective, to determine whether it is possible to reasonably conclude that the control objective will be met in the future as planned.

In view of the crucial role of ex post audits, this assessment needs to check, in particular, whether the scope and results of the ex post audits carried out until the end of the reporting period are sufficient and adequate, respectively, to meet the multiannual control strategy goals.

Adequacy of the scope

The adequacy of the scope of the (cumulative) audit effort carried out until the end of each year is to be measured by comparing the planned with the actual volume of audits completed.

The data are to be shown per year and cumulated, in line with the current annual activity report presentation of error rates.

The executive director should form a qualitative opinion to determine whether deviations from the plan are of such significance that they seriously endanger the achievement of the control objective for the programmes. If this were the case, the executive director would be expected to qualify their annual statement of assurance with a reservation.

Audit coverage: SESAR-specific Horizon Europe audits

By the end of 2025, the SESAR 3 JU had audited one participation that was sampled out of the first 2024 Horizon Europe payments and represented 78 % of the total value of that snapshot covering 2.66 % of its Horizon Europe expenditure to date. This percentage refers to the value of the participations of the audited beneficiary of the first snapshot, also referred to as the 'direct' coverage. The non-audited participations of the audited beneficiary, also referred to as the 'indirect' coverage, which after the full treatment of audit results are considered clean (i.e. no systemic errors), are calculated as 21.04 %, with a total (direct and indirect) coverage of 23.70 %.

([89]) See pages 6, 15 and 19 of the Horizon Europe control strategy and Annex VII, Section VII.3 of the Horizon Europe multiannual audit plan.

11. Release 15 results – overview

The table summarises the outcomes of the release 15 exit maturity gates.

- Shadowed in dark blue: new SESAR Solutions delivered at TRL6 (or higher).
- Shadowed in light blue: SESAR Solutions delivered in previous releases that have progressed to TRL7 or TRL8.

R & I flagship	SESAR project	SESAR Solution ID	SESAR Solution title	TRL
Connected and automated ATM	ASTAIR	0501	Autonomous taxi management	TRL1 completed
	CODA	0447	Adaptive system based on controller status for enhanced human–AI teaming	TRL2 completed
	HYPERSOLVER	0505	HYPERSOLVER – Deep reinforcement learning architecture and human–AI teaming	TRL1 completed
	HYPERSOLVER	0493	HYPERSOLVER – connected ATFM and ATC	TRL1 completed
Capacity-on-demand and dynamic airspace	HUCAN	0445	New holistic certification approach for novel ATM-related systems based on higher levels of automation	TRL2 completed
	HUCAN	0446	Preliminary guidelines to design ATM-related systems based on higher levels of automation	TRL2 completed
	SMARTS	0433	SMART sectors	TRL2 completed
U-space and urban air mobility	ImAFUSA	0463	IAM impact assessment framework and toolset for improved trade-off between societal acceptance and airspace capacity levels of IAM	TRL1 completed
	MUSE	0403	U-space environmental and social impact assessment framework	TRL1 completed
	AI4HyDrop	0448	Service Integration Guidelines	TRL1 completed
	AI4HyDrop	0449	Airspace design service	TRL2 completed
	AI4HyDrop	0450	Autonomous flight plan approval service	TRL2 completed
	AI4HyDrop	0451	Drone detection and communication service	TRL4 completed
	ÉALÚ-AER	**0552**	**AESA X-band radar as a service enabler**	TRL8 completed
	ÉALÚ-AER	**0553**	**Modular and scalable CNPC radio infrastructure as reliable C2 link**	TRL8 completed
	U-ELCOME	**0311** [90]	**Initial U-space implementation in controlled and uncontrolled airspace (SDO10, DA 10.2)**	TRL8 completed

[90] BURDI's solutions 0342, 0343, 0344 and ÉALÚ-AER's solution 0308 were merged with U-ELCOME's solution 0311.

R & I flagship	SESAR project	SESAR Solution ID	SESAR Solution title	TRL
Aviation green deal	AEROPLANE	0419	Impact assessment methodology to measure the contribution of aviation to climate change	TRL2 completed
	AEROPLANE	0420	Assessment methodology to measure the impact of climate-changed-induced events on aviation operations	TRL2 completed
	AEROPLANE	0421	Climate services for climate change mitigation and adaptation in aviation	TRL2 completed
	E-CONTRAIL	0374	Climate quantification and hotspot prediction service	TRL1 completed
	Green-GEAR	0406	Vertical guidance using geometric altimetry	TRL2 completed
	Green-GEAR	0407	Separation minima	TRL2 not completed
	Green-GEAR	0408	Green route charging	TRL2 not completed
	ECHOES	0324	Oceanic operations enhancement with SB-VHF	TRL2 completed
	HERON	**0357**	**Optimised single engine taxiing (SDO2, DA 2.3)**	TRL8 completed
	HERON	**0355**	**Top of descent using CPDLC**	TRL7 completed
	HERON	**0356**	**Engines-off sustainable taxiing through use of a sustainable taxiing vehicle (SDO2, DA 2.3)**	TRL7 completed
	HERON	**0358**	**Airside/landside performance management (green apron management)**	TRL7 completed
	HERON	PJ.02-W2-14.3	Increased second glide slope (ISGS) (SDO2, DA 2.5)	TRL7 completed
	HERON	PJ.02-01-01	Optimised runway delivery on final approach (SDO2, DA 2.6)	TRL7 completed
	ECHOES	**0323**	**SB-VHF Communications**	TRL7 completed
	HERON	115	Extended Projected Profile (EPP) availability on ground	TRL7 completed
	HERON	05	Extended Arrival Management (AMAN) horizon	TRL8 completed
	HERON	201	Dynamic route availability document (RAD) (SDO5, DA 5.3)	TRL8 completed
	HERON	PJ.02-08-03	Reduced separation based on local runway occupancy time characterisation (SDO2, DA 2.6)	TRL8 completed
	HERON	PJ.38-01	ADS-C common service	TRL8 completed

R & I flagship	SESAR project	SESAR Solution ID	SESAR Solution title	TRL
AI for aviation	TRUSTY	0434	AI-powered situational awareness for remote airfields (APSARA)	TRL1 completed
	SynthAIR	0376	Improved ATM automation and simulation through AI-based universal models for synthetic data generation	TRL1 completed
	ASTRA	0373	Tactical FMP hotspot prediction and resolution	TRL2 completed
Multimodality and passenger experience	MAIA	0398	MAIA-UAM	TRL1 completed
	MAIA	0397	MAIA-CCAM	TRL1 completed
	MAIA	0396	MAIA-Engine	TRL1 completed
	MultiModX	0400	Schedule design solution	TRL2 completed
	MultiModX	0401	Disruption management solution	TRL2 completed
	MultiModX	0399	Performance assessment solution	TRL2 completed
Virtualisation and cyber-secure data sharing	SEC-AIRSPACE	0426	Holistic and dynamic risk assessment for the ATM domain	TRL1 completed
	SEC-AIRSPACE	0427	Personalised cyber security training and awareness for ATM actors	TRL1 completed

Among the eight new SESAR Solutions developed by the DSD1a projects, only HERON 0355 does not require standardisation and regulation needs.

12. List of abbreviations

Abbreviation	Definition
AA	additional activities
AAM	advanced air mobility
ABAC	Accrual Based Accounting
ACI	Airports Council International
AF	air traffic management functionality
AI	artificial intelligence
ANS	air navigation service
ANSP	air navigation service provider
Ares	advanced records system
ARIS	aviation research and innovation strategy
ATC	air traffic control
ATCEUC	Air Traffic Controllers European Unions Coordination
ATM	air traffic management
AU	airspace user
BAWP	biannual work programme
BOA	back-office arrangement
CAAR	consolidated annual activity report
CANSO	Civil Air Navigation Services Organisation
CAS	Common Audit Service
CATS	complete air traffic system
CBE JU	Circular Bio-based Europe Joint Undertaking
CEF	Connecting Europe Facility
CERT-EU	Cybersecurity Service for the Union Institutions, Bodies, Offices and Agencies
CINEA	European Climate, Infrastructure and Environment Executive Agency
CNS	communications, navigation and surveillance
CO_2	carbon dioxide
CP	common project
CP2	Common Project 2
DA	Deployment Action
DES	Digital European Sky Programme
DG	Directorate-General
DP	development priority
DSD	digital sky demonstrator
EASA	European Union Aviation Safety Agency
EASN	European Aeronautics Science Network
EBAA	European Business Aviation Association
ECA	European Court of Auditors

Abbreviation	Definition
EDA	European Defence Agency
EFTA	European Free Trade Association
EMAS	eco-management and audit scheme
ER	exploratory research
ER1	first exploratory research call
ER2	second exploratory research call
ER3	third exploratory research call
ESA	European Space Agency
ETF	European Transport Workers' Federation
EUAN	EU Agencies Network
EUROCAE	European Organisation for Civil Aviation Equipment
EUROCONTROL	European Organisation for the Safety of Air Navigation
EUSPA	European Union Agency for the Space Programme
FTE	full-time equivalent
GANP	global air navigation plan
GB	Governing Board
HAN	Hermes-Ares-NomCom
HAO	higher airspace operations
HR	human resources
IAC	Internal Audit Capability
IAM	innovative air mobility
IAS	Internal Audit Service
IATA	International Air Transport Association
ICAO	International Civil Aviation Organization
ICT	information and communications technology
IFATCA	International Federation of Air Traffic Controllers' Associations
IFATSEA	International Federation of Air Traffic Safety Electronics Associations
IKAA	In-kind contributions to additional activities
IKOP	in-kind contributions to operational activities
IR	industrial research
IR1	first industrial research call
IR2	second industrial research call
IRIS2	infrastructure for resilience, interconnectivity and security by satellite
IT	information technology
KIP	Key impact pathway
KPI	key performance indicator
max.	maximum
MFF	multiannual financial framework
min.	minimum
MoC	memorandum of cooperation

Abbreviation	Definition
n/a	not applicable
NDOP	network directors of operations
NDTECH	network directors of technology
NMB	Network Management Board
OLAF	European Anti-Fraud Office
PC	Programme Committee
PSO	professional staff organisation
Q1	first quarter
Q2	second quarter
Q3	third quarter
R & D	research and development
R & I	research and innovation
RP4	fourth reference period
RPA	remotely piloted aircraft
RPAS	remotely piloted aircraft system
SAO	strategic area of operation
SBA	Single Basic Act
SC	Scientific Committee
SDM	SESAR Deployment Manager
SDO	strategic deployment objective
SES	single European sky
SESAR	single European sky ATM research
SESAR 2020	SESAR 2020 innovation R & I programme, also referred to as the 'SESAR 2020 programme' or 'SESAR 2020 R & I programme'. It is the coordinated set of activities described in this document, being undertaken by the SESAR JU members and managed by the SESAR JU.
SESAR JU	Single European Sky ATM Research Joint Undertaking
SESAR 3 JU	Single European Sky ATM Research 3 Joint Undertaking
SLA	service-level agreement
SME	small and medium-sized enterprise
SNE	seconded national expert
SOA	service-oriented architecture
SRG	States' Representatives Group
TA	temporary agent
TBO	trajectory-based operation
TCG	Technical Coordination Group
TMA	terminal manoeuvring area
TRL	technology readiness level
U-space	A set of services relying on a high level of digitalisation and automation of functions, and specific procedures designed to support safe, efficient and secure access to airspace for a large numbers of drones, with an initial look at very low-level operations.
WA	work area

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