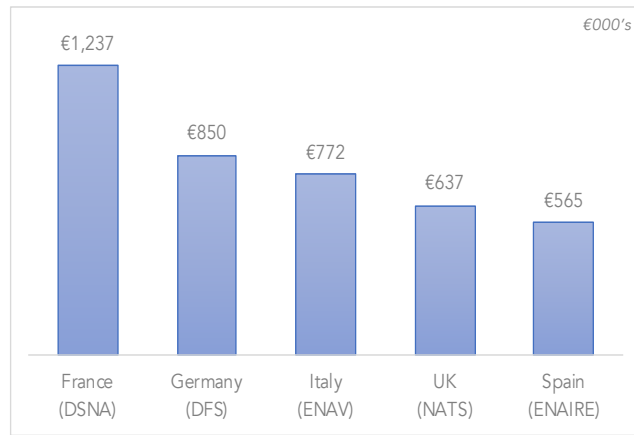


# ANSP COST RECOVERY FIVE EUROPEAN MARKETS

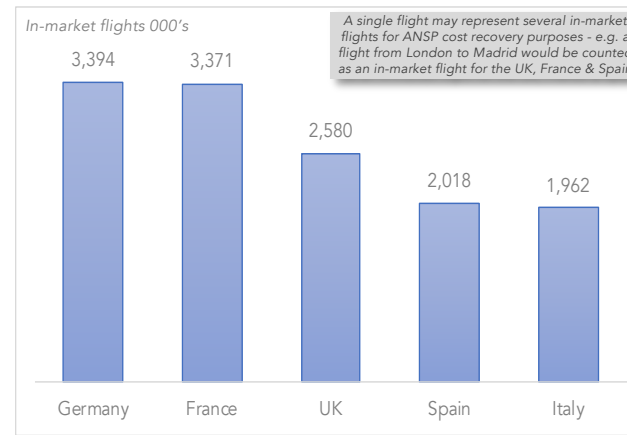
## ANSP COSTS (2019)

For Europe's five major markets, en-route ANSP User Chargeable Costs totaled €4.1Bn in 2019 (1)



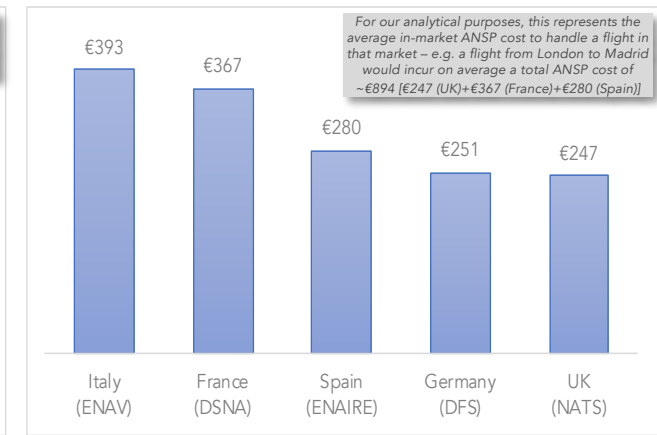
## FLIGHTS (2019)

Total in-market flights in 2019 (Arrivals, Departures, Overflights & Internals) totaled 13.3 million (1)



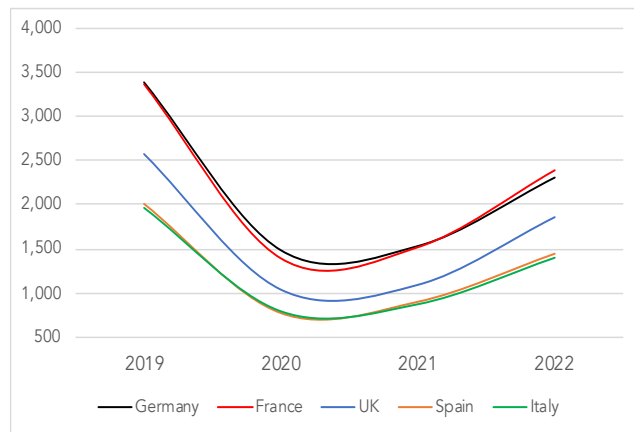
## ANSP COST PER FLIGHT (2019)

The resultant average ANSP in-market costs per flight have wide variation – the UK is the lowest (2)



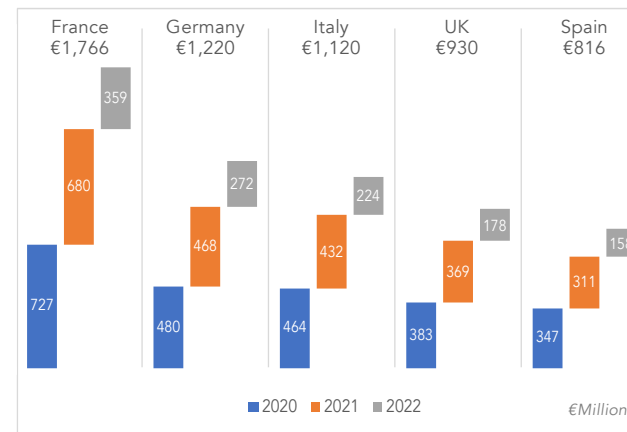
## FLIGHTS (2020-22)

Based on Eurocontrol's mid-range forecasts, a total of 19.2Mn in-market flights will be 'lost', 2020-22 (3)



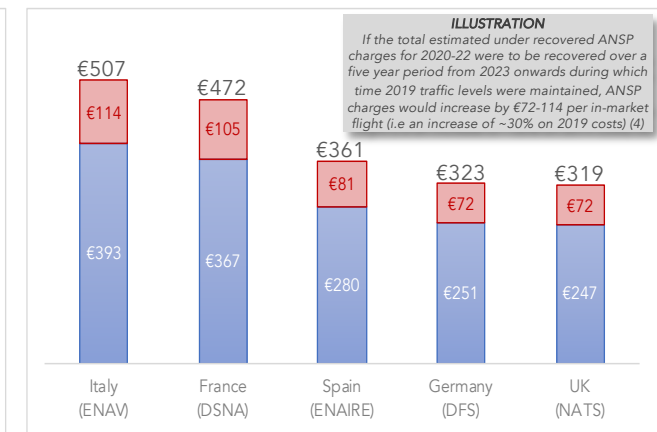
## COST RECOVERY GAP (2020-22)

The estimated ANSP Cost Recovery Shortfall from these 'lost' flights totals €5.8Bn over the period (4)



## MATERIALITY

The ANSP Cost Recovery Shortfall is significant. Its recovery will result in increased future user charges



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### NOTES:

1. Source: Eurocontrol Central Route Charges Office: Report on the Operation of the Route Charges System in 2019
2. Metric developed by Five Aero for analytical purposes. In practice, the charge is calculated on a per flight basis using three elements (1) Distance (2) Aircraft Weight (3) Unit Rate of Charge
3. Source: Eurocontrol Covid-19 Impact on Eurocontrol Members States
4. Five Aero estimate based on 2019 ANSP in-market average costs per flight