



10<sup>o</sup> ENAIRE   
ANIVERSARIO

# Executive Summary 2024



GOBIERNO  
DE ESPAÑA

MINISTERIO  
DE TRANSPORTES  
Y MOVILIDAD SOSTENIBLE



01

P.3  
About ENAIRE

02

P.12  
Operational  
Highlights

03

P.15  
Historic  
Air Traffic Record

04

P.20  
Notable  
Activities

05

P.28  
Our  
Commitment

06

P.36  
Financial  
Position





# 01

## About ENAIRe

1.1. ENAIRe LEADER IN AIR NAVIGATION

1.2. GOVERNANCE

1.3. 2025 FLIGHT PLAN

1.4 PURPOSE, VISION, MISSION AND VALUES

1.5. SUSTAINABILITY STRATEGY

# 1.1. ENAIRe LEADER IN AIR NAVIGATION

**10 years driving air navigation:** innovation, safety and sustainability in tomorrow's skies

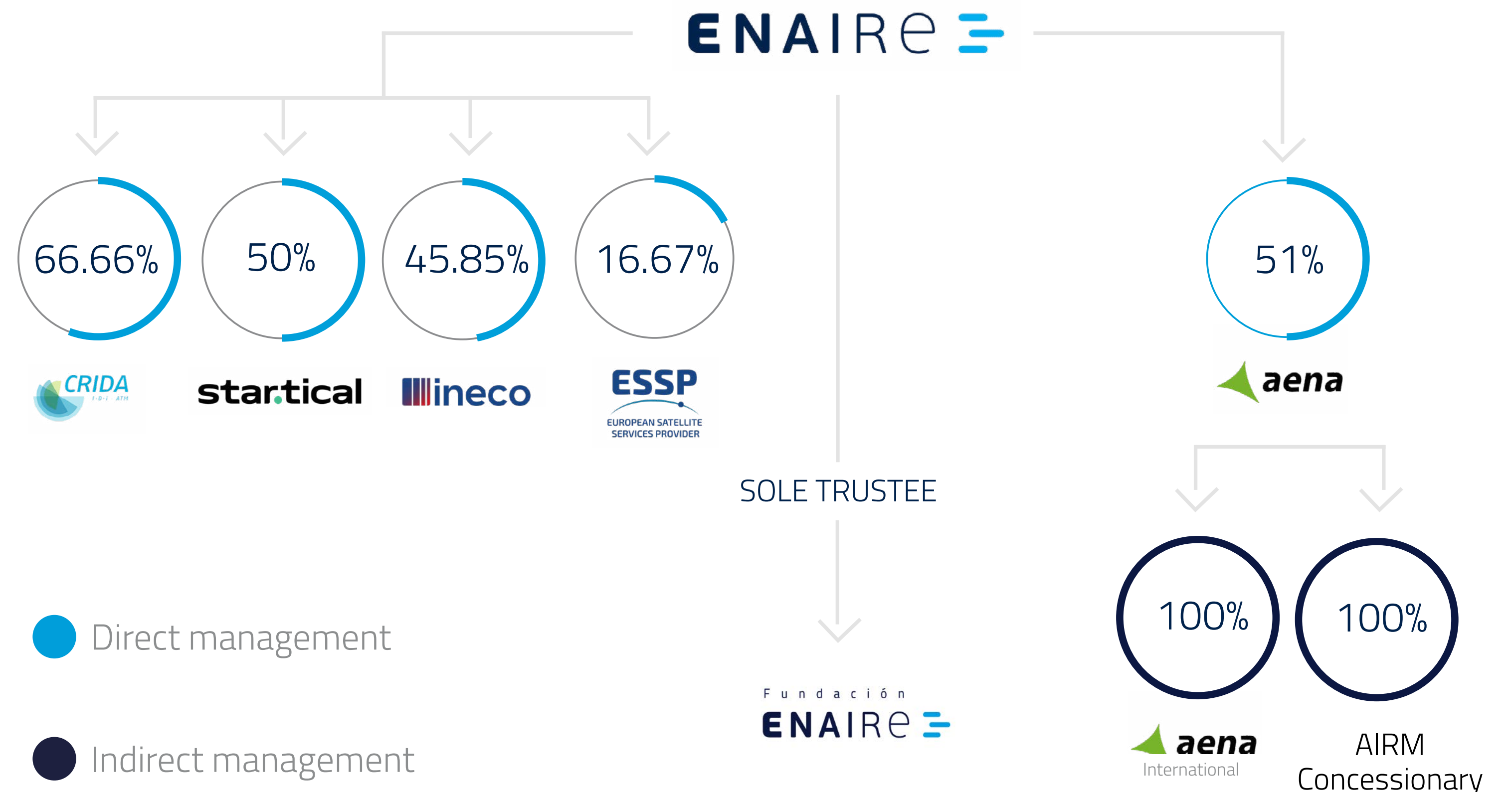
We are Spain's leading public company in the field of air navigation.

Thanks to our services in the Spanish airspace, in collaboration with the sector's various stakeholders, we promote the development of air transport in an efficient, competitive and sustainable manner.

On the occasion of our tenth anniversary, we remain the leading provider of air navigation services in Spain and the fourth largest in Europe, striving to set a benchmark of excellence for both our customers and society at large.



We are attached to the Ministry of Transport and Sustainable Mobility and we develop our strategy within the framework of the government's general transportation policy





## Historic record

The year 2024 has set a new **record in Spanish aviation** by surpassing the number of flights registered the previous year, which already marked a remarkable recovery in the sector by surpassing pre-pandemic levels. This growth was achieved despite global challenges, such as the war in Ukraine, rising inflation in Europe, geopolitical tensions in the Middle East and the impact of extreme weather events.

**Air traffic increased by 7.6%** over the previous year and 9.7% over the year prior to the pandemic, exceeding the number of flights managed at most airports in Spain.

ENAIRe manages **22% of flights from Europe** and 11% of total delays. The average route delay per flight from Spain has been much lower than in Europe, even with a higher volume of traffic than in the previous year. The delay attributable to ENAIRe airports was 12.6% lower in 2024. 20% of en-route delay minutes were due to adverse weather.

## Our competitive edge

In 2024, route charges increased by 14.7% in the Peninsula and 9.6% in the Canary Islands compared to the previous year. In addition, once the 2019 traffic levels were exceeded, in accord with the 2025 Flight Plan (PV2025) strategy and the Performance Plan (RP3), route charges were equal to those of 2019, with a slight increase of 2.3% in the Peninsula and 0.8% in the Canary Islands.

## Spain continues to maintain the most competitive unit rates of the main European suppliers

**ENAIRe is the European air navigation service provider with the largest volume of participation in the SESAR 3 Single European Sky programme, reaching a total of €21.03M**

## Our commitment to the sky of the future

As part of our active involvement in updating the European Air Traffic Management (ATM) Master Plan and in the establishment of the new SESAR 3 Joint Undertaking, our commitment to the Single European Sky was reflected in the approval of over €107 million in funding from the Next Generation EU programme. These funds support the implementation of actions aligned with the Single European Sky initiative, as well as our contribution to the Ministry of Transport and Sustainable Mobility's, "Sustainable, Safe and Connected Mobility Strategy 2030", through the Recovery, Transformation and Resilience Plan (PRTR).

ENAIRe's Strategic Innovation Plan allocates more than 20 million per year in investments for research, development and innovation until 2025, having reached 24 million in 2024. The Plan includes an Innovation Management System and reinforcing cooperation with our R&D&I Reference Centre (RDIRC).



**EUROCONTROL recognises ENAIRe as one of the leading air navigation service providers in Europe**



## 1.2. GOVERNANCE

### Governing Board

ENAIRe's highest governing body, pursuant to by the Entity's Statutes (RD 160/2023, of 7 March):



Board members



Meetings in 2024



5 women



7 men

13



#### As its main functions, the Governing Board approves:

- ENAIRe Strategic Plan (Flight Plan)
- Code of Ethics and Policies
- Multiannual Action Plan, the Operating Budget and the Business Plan
- Strategic risk map
- Company objectives
- Delegation of powers
- Annual accounts
- Financial and non-financial information report
- Ethics and Regulatory Compliance Management System report
- Internal Information System report





## 1.3. 2025 FLIGHT PLAN

The 2025 Flight Plan is ENAIRE's Strategic Plan for the 2021-2025 period, which was approved by ENAIRE's Governing Board in April 2021 and recently updated in December 2023. This plan establishes ENAIRE's annual objectives in line with its mission and values to offer top-quality services to its customers and society while minimising environmental impact and promoting sustainability.

The 2025 Flight Plan is necessary for:

- Ensuring ENAIRE's future viability, preparing us for the aviation sector's growth.
- Spearheading creation of the Single European Sky and thereby supporting fulfilment of the European targets set out in the European Performance Framework (RP3 / RP4).
- Adapting to structural changes in the sector, ensuring the provision of essential air navigation services and accessing new markets for growth.
- Promoting ENAIRE's transformation and modernisation based on the results of the EFQM assessment carried out in 2021.

This Strategic Plan comprises 12 action plans and 42 strategic initiatives focused on enhancing service quality through the development of more efficient, sustainable, and competitive solutions; expanding business capabilities by evolving towards global and decentralised service models; delivering new services such as those related to drone operations; and consolidating ENAIRE's cultural, digital, and organisational transformation.

In addition, the update of the 2025 Flight Plan began in July, to evolve the strategy towards the 2030 Flight Plan (PV2030) that will serve as a roadmap for the 2026-2030 period.



ENAIRE obtained the EFQM 600 Seal in recognition of its excellent, innovative and sustainable transformation and management of air navigation services.

### Security

ENAIRE has maintained its leadership position in safety management for the fifth consecutive year, obtaining the highest score in the Safety Management System's maturity indicator

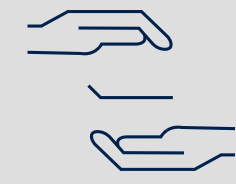
### Availability

In 2024, 99.7% of the 1,760 services comprising the Air Navigation System achieved an availability rate above 95%

### Decarbonisation

68,000 tons of CO2 have been saved thanks to a reduction of more than two million miles flown in 2024

## 2025 Flight Plan Strategic Objectives



### SAFETY & SECURITY:

#### Prioritising

- Safety culture.
- The human factor.
- Cybersecurity protection.



### QUALITY, SCALABILITY AND RESILIENCE OF SERVICES:

- Improve the quality, scalability and resilience of our services.
- Airspace modernisation and operational concepts.
- Customer and stakeholder-oriented culture.



### SUSTAINABILITY:

- Contribute to sustainable mobility in the sector.
- Minimise the environmental impact of our activities.
- Promote decarbonisation.



### BUSINESS AND INTERNATIONALISATION:

- Internationalising our business.
- Positioning ourselves as leaders and benchmarks in the air navigation sector worldwide.



### EFFICIENCY AND COMPETITIVENESS:

- Ensure the economic recovery and future viability of ENAIRe.
- Increase the company's efficiency, productivity and competitiveness.
- Adapt to structural changes in the sector, contributing to the global recovery of the aviation sector.



### TRANSFORMATION AND MODERNISATION:

- Accelerate ENAIRe's cultural and organisational transformation and modernisation, taking advantage of new technologies to become more agile and efficient.
- Develop an organisational culture focused on our people as the entity's main asset.

## Our contribution to the Sustainable Development Goals (SDGs) of the United Nations Agenda 2030



● **Impact:** Due to the characteristics of the services we provide and the scope of our action.

● **Contribution:** So our business operates properly and our management is sustainable and socially responsible.

● **Role:** As a public entity, our participation in the international environment and our collaboration with the stakeholders we have relationships with.



## Targets and achievements in 2024

The annual targets and achievements by indicator are shown below:

PERFORMANCE INDICATORS	2024 TARGETS	Projected Closing 2024	2023 Closing
<b>Safety &amp; Security</b>			
Safety Weighted Level (NPS Ground)	11.00	15.15 <sup>(1)</sup>	13.30
Effectiveness of Safety Management (EoSM)	D	D	D
Cybersecurity Maturity Index (CMI)	91.0%	91.2%	91.1%
Cumulative Cyber Resilience Indicator (CCRI)	3.9	4.2	4.2
<b>Service quality, scalability and resilience</b>			
Perceived Quality Level	77.0%	79.6%	77.2%
En-route delay (min/flight)	0.19	1.01	0.47
Arrival delay (min/flight) <sup>(2)</sup>	0.56	1.08	0.67
<b>Sustainability</b>			
Route network inefficiency (KEA)	3.08%	3.30%	3.26%
<b>Efficiency and competitiveness</b>			
Global En-Route Unit Costs (€2,017)	40.42	37,84	40.92
Financial soundness	1.60 <sup>(3)</sup>	1.70	1.55
<b>Transformation and Modernisation</b>			
Work environment	Not measured in 2024		3.61
Digital Maturity Assessment (DMA)	70.0	68.0	--

<sup>1</sup> 2024 Estimated Closing (March 2025).

<sup>2</sup> Corresponding to ENAIRe for the 7 airports of Madrid, Barcelona, Palma de Mallorca, Malaga, Gran Canaria, Alicante, and Ibiza.

<sup>3</sup> 2024 Target corresponding to the 2024 Operational Plan approved by the ENAIRe Governing Board on March 1, 2024.



**0.80**  
min/flight

En route delays  
attributable  
to ENAIRe

**0.17**  
min/flight

Arrival delays  
attributable  
to ENAIRe



## 1.4. PURPOSE, VISION, MISSION AND VALUES



### PURPOSE

We take care of your flight to make it safe, fast, efficient and sustainable.



### MISSION

We provide air navigation services with safety, quality, efficiency and respect for the environment, contributing to the development of aviation, and therefore to Spain's economic and social development.



### VISION

We want to turn ENAIRe into a global operator and a leader in the air navigation sector based on people, innovation, sustainability, and digitalisation.



### VALUES

- ✓ Safety first
- ✓ Committed to Customers and Society
- ✓ United as one Team
- ✓ Driven to elevate our Organisation



## 1.5. SUSTAINABILITY STRATEGY

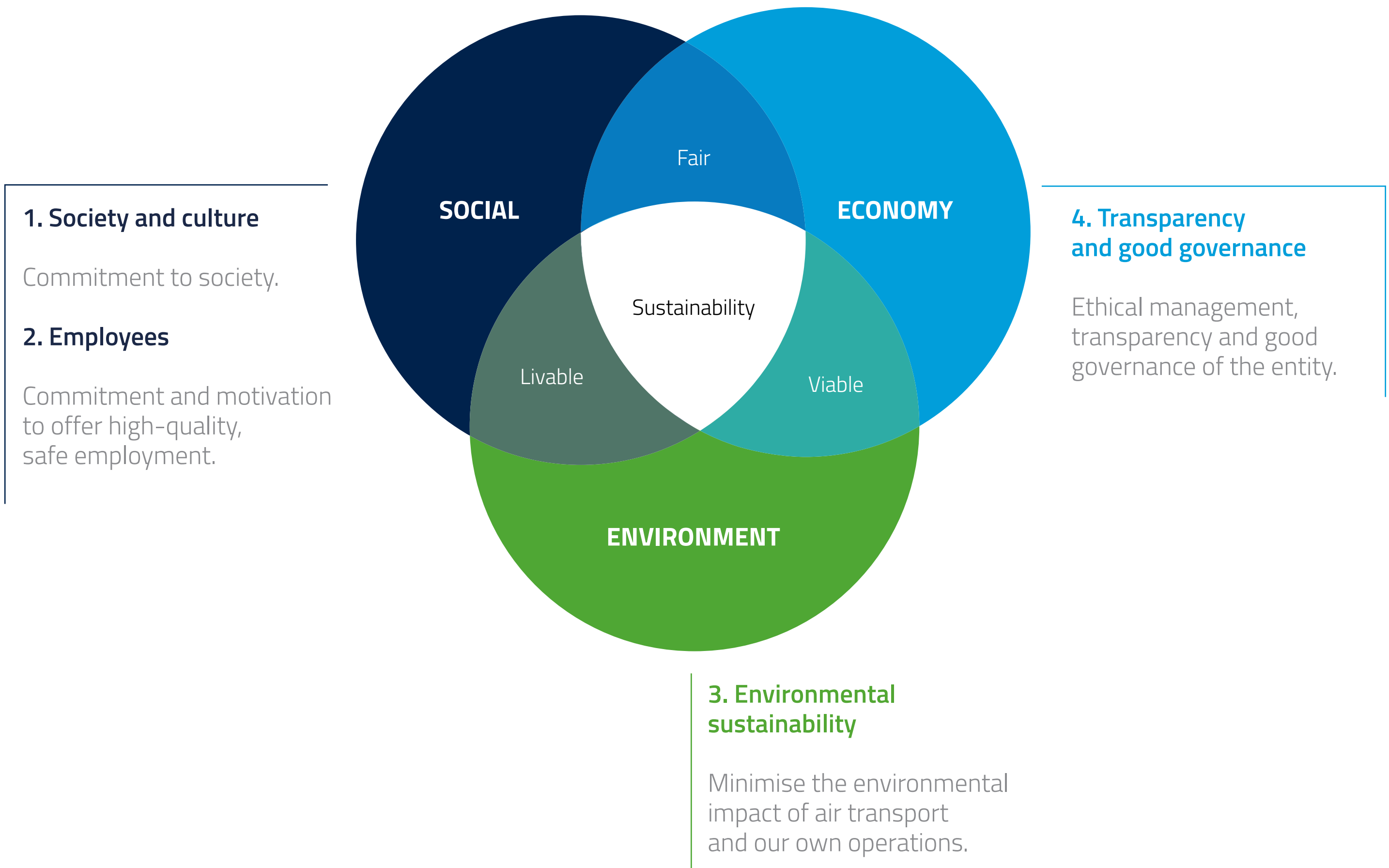
Our sustainability strategy is integrated into the strategic objectives of our 2025 Flight Plan.

Our commitment to sustainable development leads us to respond to the local, European and international normative and regulatory context, such as the United Nations' 2030 Agenda and 10 Principles of the Global Compact, Spain's 2030 Sustainable Development Strategy, the European Green Deal, which aims to make the European Union the first climate neutral space, and the International Civil Aviation Organisation's (ICAO's) collective long-term goal of net zero carbon emissions by 2050.

In addition, we are the main collaborating entity in development of the 2030 Safe, Sustainable and Connected Mobility Strategy, the roadmap that will guide the Ministry of Transport and Sustainable Mobility's actions with the goal of making mobility a right and an element of social cohesion and economic growth. This strategy is supported by:

- The Sustainable Mobility Bill as a regulatory instrument.
- The Recovery, Transformation and Resilience Plan as a budgetary instrument.

The four strategic focus areas for sustainability:







# 02

## Operational Highlights

2.1. 2024 IN FIGURES

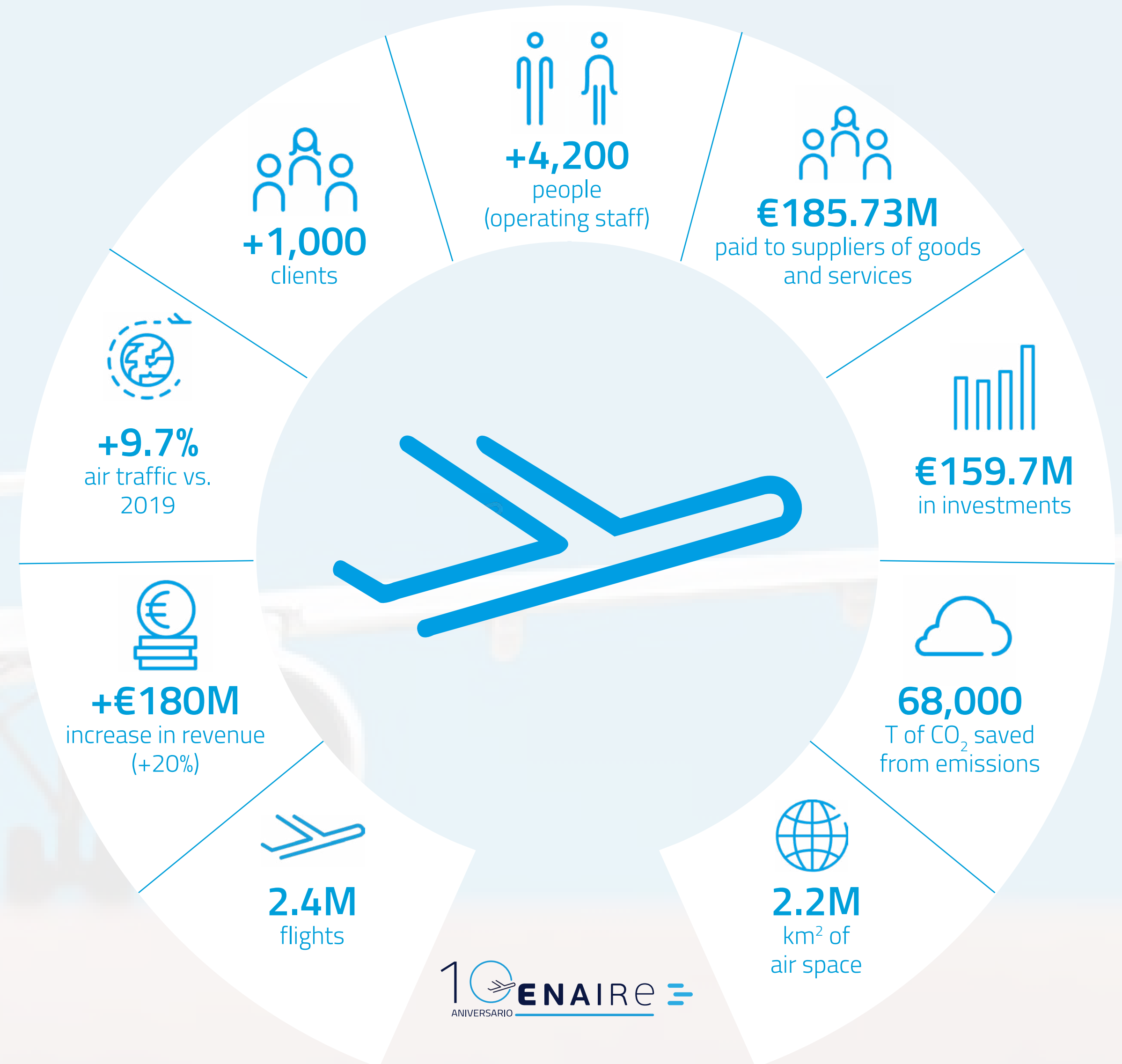
2.2. AIR NAVIGATION SERVICES



## 2.1. 2024 IN FIGURES

ENAIRe is made up of professionals who manage air traffic, ensure the operation and maintenance of essential systems and infrastructure, oversee service delivery, and design solutions to improve the safety and efficiency of air transport.

Our figures reflect the capacity and scale of our services, which made it possible to transport 309.3 million passengers in 2024\*



## 2.2. AIR NAVIGATION SERVICES

- **En-route and approach air traffic services (ATS).**  
ENAIRE is the designated provider throughout the Spanish airspace.
- **Air traffic services (ATS) for aerodrome control** provided from control towers where ENAIRE is the service provider.
- **Communications, Navigation and Surveillance services (CNS)** across the network of Communications, Navigation and Surveillance systems and equipment distributed throughout the Spanish territory and in the majority of aerodromes.
- **Aeronautical Information Services (AIS)** throughout Spanish airspace.
- **Air traffic flow management (ATFM)** services throughout Spanish airspace.
- **Airspace Management (ASM) services (tactical/level 3)** in all facilities where ENAIRE is the ATS provider.
- **Flight Procedure Design (FPD) services** available for all aerodromes and approach/en-route airspace.

In 2024, ENAIRE assumed management of the ARO Offices in 17 Spanish airports to improve their efficiency and service



\*The provision of a service by one provider does not preclude the existence of another.  
Lleida: Surveillance (S)  
Castellón: Surveillance (S)







# 03

## Historic Air Traffic Record

- 3.1. AIR TRAFFIC GROWTH
- 3.2. MONTHLY EVOLUTION
- 3.3. KEY TRAFFIC FLOWS



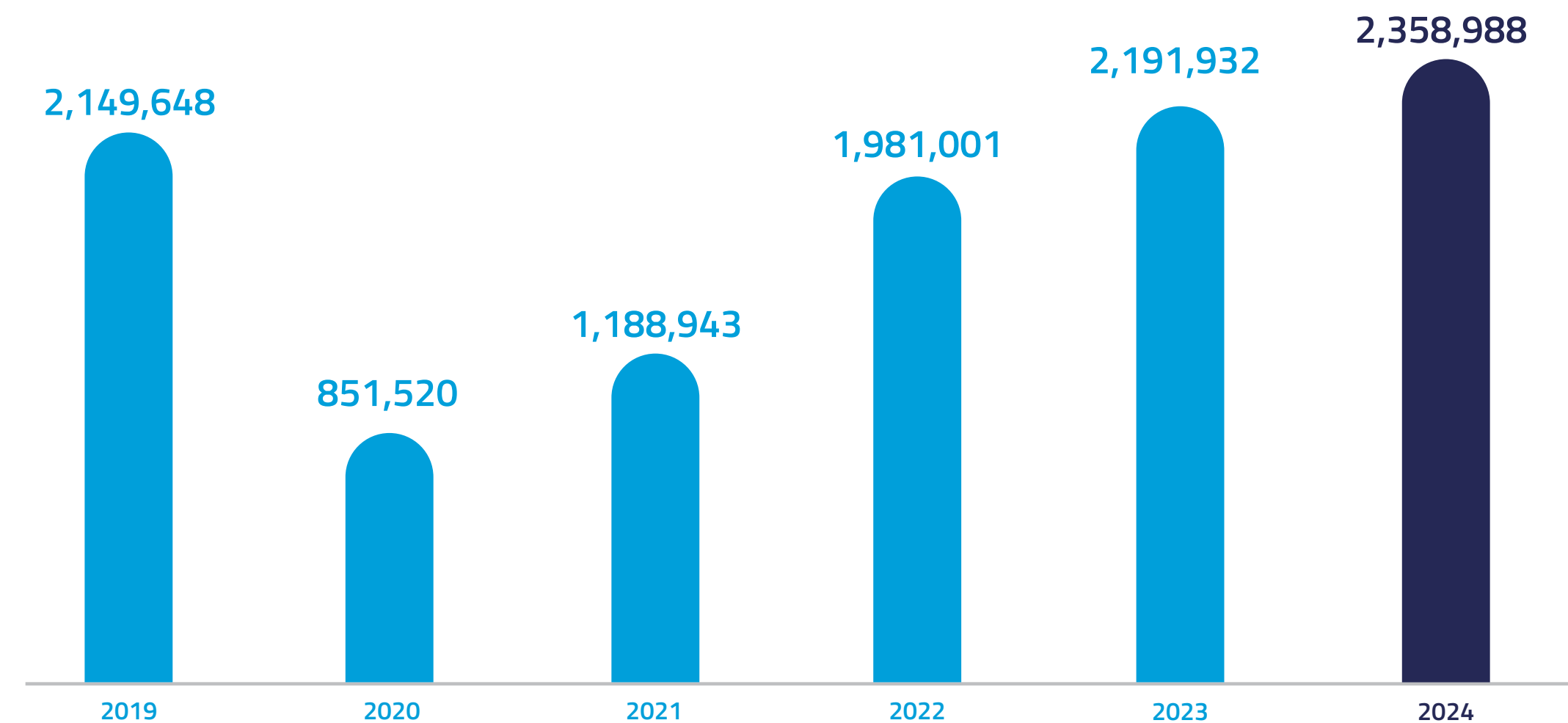
## 3.1. AIR TRAFFIC GROWTH

### Air traffic in 2024 reached new historic levels, surpassing pre-COVID-19 levels.

At ENAIRe, we managed nearly 2.4 million flights, an increase of 7.6% compared to 2023 and 9.7% more than the figure achieved in 2019. Furthermore, all airports surpassed the number of flights managed in the year prior to the pandemic, with the exception of Adolfo Suárez Madrid - Barajas airport.

Although all major European countries have exceeded 2023 traffic levels, only Spain, Italy and France have managed to exceed 2019 air traffic figures.

#### Flights managed by ENAIRe



**7.6% ↑**  
Growth  
vs. 2023

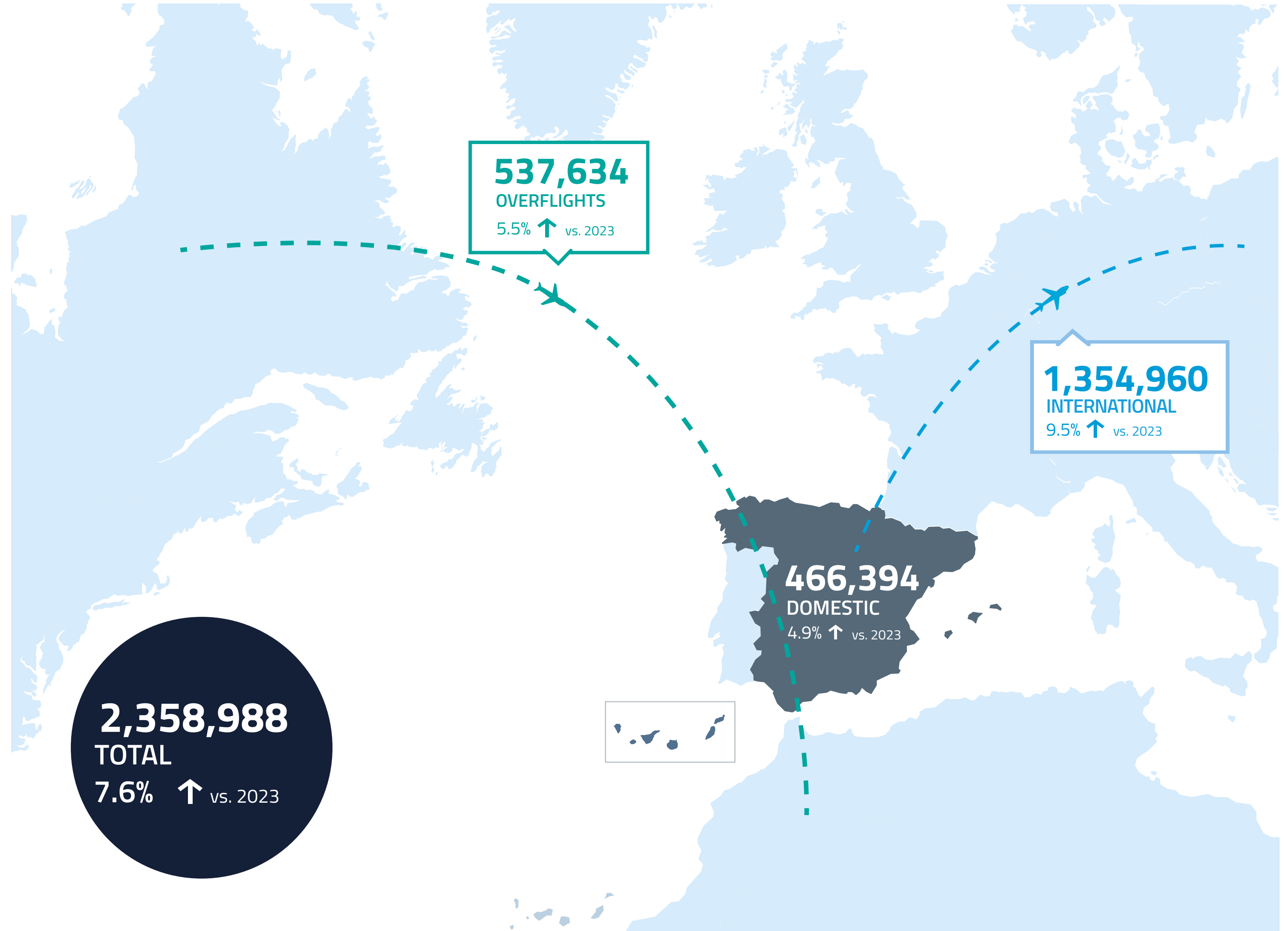
**9.7% ↑**  
Growth  
vs. 2019





The year 2024 brought a positive evolution in the number of flights, reflecting the airline industry's ability to adapt to a significant increase in traffic. Specifically, there was an increase of 9.5% in international flights and 4.9% in domestic flights compared to the previous year. As far as overflights, meaning those that do not have airports in the Spanish territory as their origin or destination, there was a 5.5% increase compared to 2023.

Spain is the European country with the 4th highest air traffic volume, with an average of **6,445 flights per day** in 2024

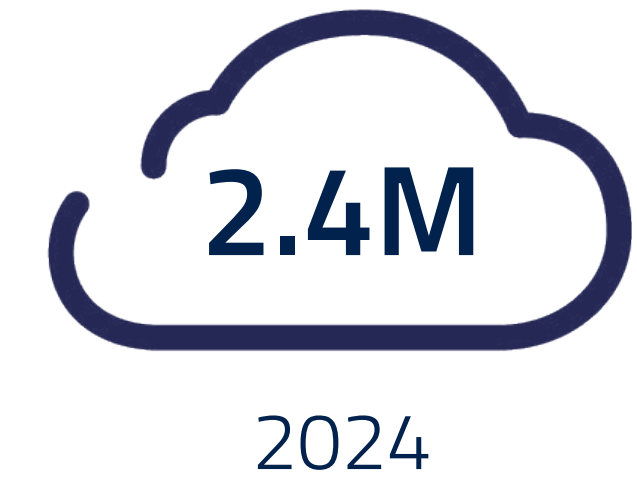
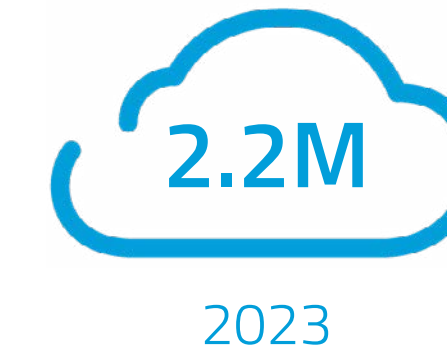
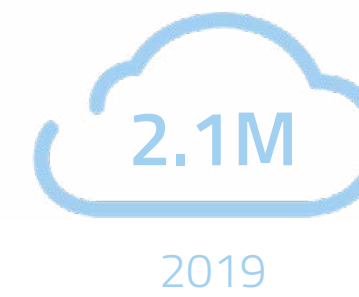




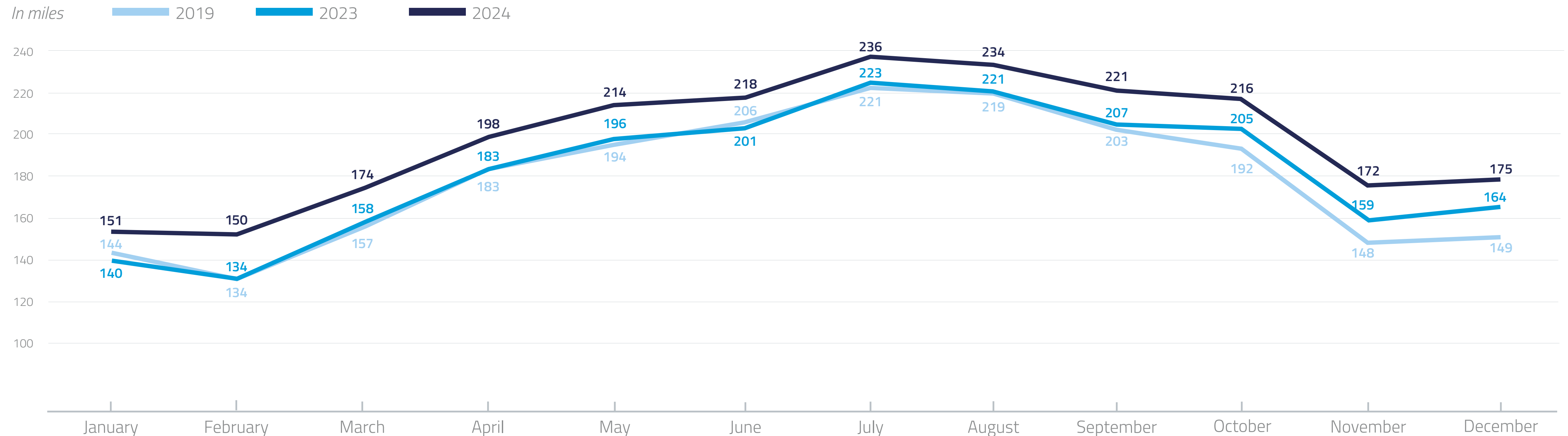
## 3.2. MONTHLY EVOLUTION

At ENAIRE, we have continued working to achieve air traffic recovery, managing a 7.6% growth compared to 2023, with the greatest growth in 2024 seen in the months of February, March and May, with increases of more than 9% compared to the previous year. Compared to 2019, the growing trend already observed in 2023 of flights in the last quarter of the year continues.

### Total annual flights managed by ENAIRE



### Number of flights per month\*



\*The years 2020, 2021 and 2022 were omitted from this graph due to flight-number anomalies caused by the COVID-19 pandemic in order to ensure a comparison of the monthly flight numbers free from atypical distortions.

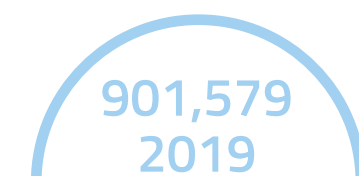


## 3.3. KEY TRAFFIC FLOWS

### Air traffic flows

	TYPE	TOP 10 FLOWS	2024	2024 vs. 2023
1	DOM	Peninsula <> Peninsula	176,520	↑ 3.1%
2	INT	United Kingdom <> Peninsula	160,503	↑ 7.3%
3	INT	Italy <> Peninsula	112,011	↑ 15.4%
4	INT	France <> Peninsula	102,001	↑ 6.9%
5	DOM	Canary Islands <> Canary Islands	97,818	↑ 4.6%
6	DOM	Balearic Islands <> Peninsula	95,452	↑ 2.1%
7	INT	Germany <> Peninsula	89,447	↑ 9.1%
8	INT	Netherlands <> Peninsula	87,756	↑ 6.5%
9	DOM	Canary Islands <> Peninsula	74,072	↑ 14.5%
10	INT	United Kingdom <> Canary Islands	72,455	↑ 11.3%

### TOP 10 Flow Volume Comparison





# 04

## Notable Activities

4.1. SAFETY & SECURITY

4.2. AIRSPACE MANAGEMENT AND DIGITALISATION

4.3. INNOVATION AND DRONES

4.4. TECHNOLOGY MODERNISATION

4.5. INTERNATIONAL EXPANSION



## 4.1. SAFETY & SECURITY

Safety and security are ENAIRE's number 1 priority: operationally, in cybersecurity, and in the protection of our infrastructures and people. In this domain, the following activities stood out in 2024:

- Continuous reinforcement of safety together with pilots, controllers, and technical staff by carrying out joint activities to improve communication and mutual knowledge.
- Adaptation of ENAIRE's Safety processes to the new regulatory framework for the civil use of UAS (Uncrewed Aircraft Systems).
- Implementation of the new theoretical and practical safety instructor roles in all of ENAIRE's Regional Directorates and Central Services.
- Renewal of the National Safety Scheme's Certificates of Conformity for both Business Management and Air Navigation Support Systems (Middle Category) and for the Critical Operational Systems directly involved in providing essential Air Navigation services.
- Safety analysis of the main operational changes introduced in the Spanish air navigation system such as centralisation of the ARO Office, modifications to the instrumental procedures of the South of Madrid configuration for the AMBAR project, the HERMES project for new approach manoeuvres to the Gran Canaria airport and modifications in Barcelona's operational procedures for the America's Cup.



Strengthening security in our infrastructures and facilities.



### 2024 Milestones



**Maximum score in the Safety Management System (EoSM) maturity indicator**, which maintains ENAIRE as a benchmark for Safety management in Europe



**Development of the Safety Audit Requirements and Evidence Management Tool (GREASE)**



## 4.2. AIRSPACE MANAGEMENT AND DIGITALISATION

We continue to digitalise ATM processes and drive the implementation of new processes for the flexible use of airspace and improved route efficiency.

- Among the major projects ENAIRE is developing, the following stand out in 2024:
  - Commissioning of the HERMES project, proposing new and more precise manoeuvres (Required Navigation Performance Approach) to all the runway ends at the Gran Canaria Airport.
  - Re-design of airspaces in the Balearic Islands within the framework of the BRUT Project.
  - Important advances in the AMELIA Project aimed at restructuring the departure, arrival and approach procedures of Alicante airport, to improve PBN (Performance Based Navigation) operations based on Satellite Navigation.
- Commissioning of new approach procedures to improve PNB operations based on Satellite Navigation, which will enhance the safety and regularity of flights at the airports of Vitoria, Tenerife North, Ibiza, Huesca and San Sebastián, as well as more efficient operations, economic savings and advances in sustainability.

### Digitalisation

- €63.7M investment in **Digital ATM Systems**.
- Increased digitisation of the Aeronautical Information Service (AIS) and significant increase in available data, with a substantial boost in aerodrome data.
- **Increased internal digitisation and process automation** through innovative tools for automating **and robotising new processes**.
- Evolution in the area of **operational/business Big Data** (data culture).
- **Signing of an Agreement with the autonomous National Center for Geographic Information (CNIG) to enhance cartographic information on the national territory** with digital models of the terrain.





## 4.3. INNOVATION, DRONES AND U-SPACE

At ENAIRE we continue to work on the Strategic Innovation Plan (PIENSA), as part of the 2025 Flight Plan.

This plan aims to ensure systematic innovation management through progressive implementation of an Innovation Management System and collaboration with CRIDA, our R&D&I reference centre, as the driving force behind ATM innovation. We are currently working in four areas of R&D&I:

- Internal innovation.
- Collaborative innovation in Europe (Single European Sky ATM Research Project (SESAR)/ Horizon Europe Programme).
- Open Innovation.
- Technology Tracking and Competitive Intelligence.

As part of our commitment to promoting open innovation, ENAIRE participated in a total of 31 projects within the SESAR 3 programme in 2024, positioning itself as the ANSP with the highest volume of participation. Within the framework of Digital European Sky (SESAR3JU) we lead the PEARL (Performance Analysis), SPATIO (U-space) and DEVICE (Virtual Centre Demonstrator) projects. We also lead the EDGAR project, an improved GBAS solution to respond to the growing demand for approach operations, and sustainability requirements for meeting the objectives of the EU Green Deal, with funding from the EU Space Agency (EUSPA).

Through STARTICAL, a company formed by ENAIRE and INDRA (50%), we are working towards deploying a constellation of more than 300 small satellites in low orbit, which will enable surveillance and communication, especially in remote and ocean areas.

### Drones and U-space

#### Demand for drone flights increased by 292% in 2024.

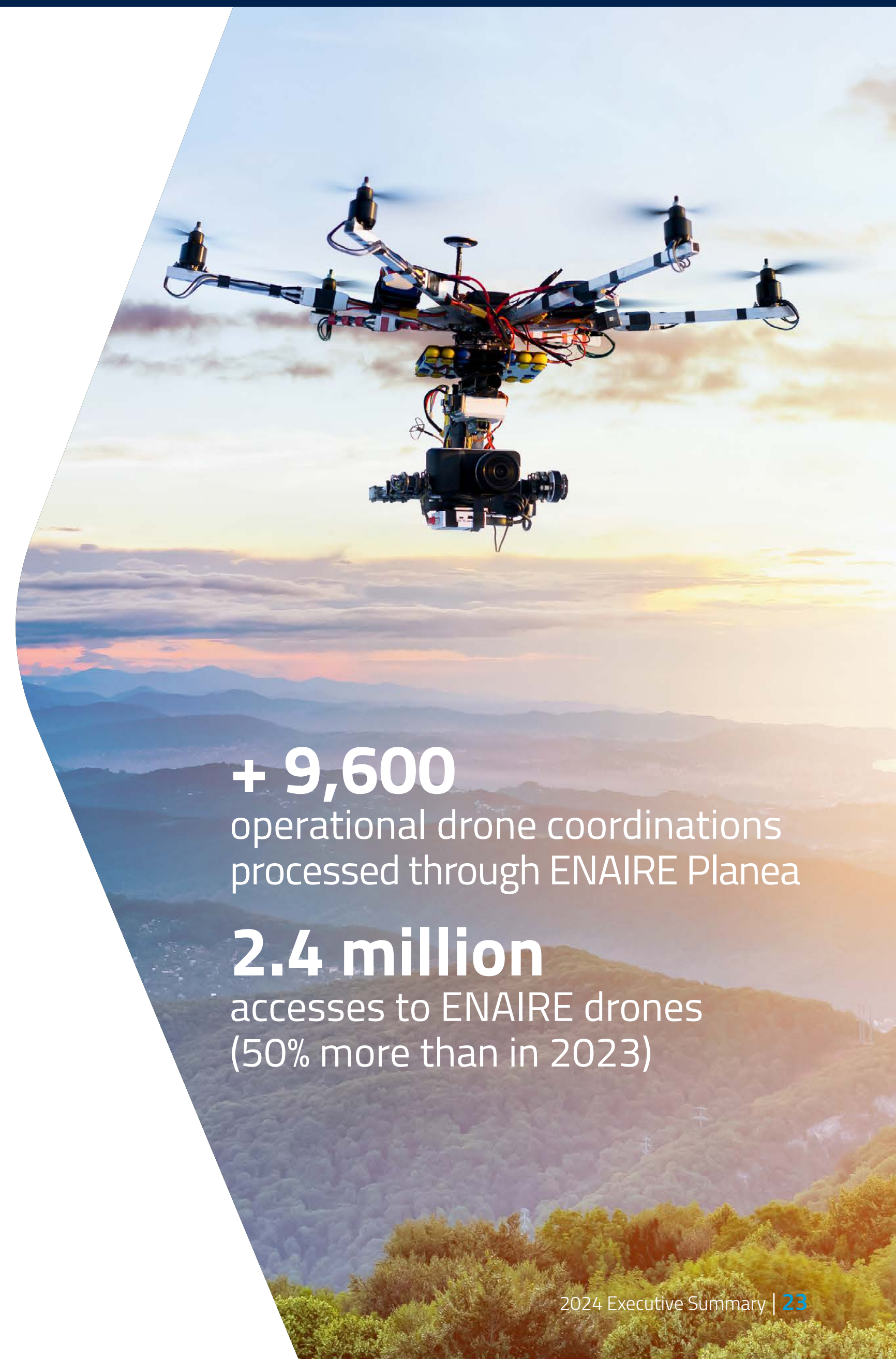
In 2024, the National Action Plan for U-Space Deployment (PANDU) was updated, including the actions necessary for the deployment of this space.

ENAIRE has been designated by the State as a Common Information Service Provider (CISP) and, acting initially as a U-space Service Provider (USSP) for administrations and public entities, will help drive the creation of a competitive and open market with other USSP providers.

In addition, we have continued developing the CISP and USSP software, which was complemented with validation tests that will allow ENAIRE to begin certification in 2025.

The first demonstrations in Spain have been carried out for the U-ELCOME U-space pre-deployment project, led by EUROCONTROL, which has held demonstrations in Italy, France, and Spain, and in which ENAIRE leads the Spanish cluster and coordinates validations in the 8 Spanish sandboxes (test environments).

In coordination with DGAC, ENAIRE has begun participating as a member in the Advancer Air Mobility Study Group (AAM SG) of the International Civil Aviation Organisation (ICAO) whose objective is to introduce the AAM concept within the ICAO framework.



**+ 9,600**  
operational drone coordinations  
processed through ENAIRE Planea

**2.4 million**  
accesses to ENAIRE drones  
(50% more than in 2023)



## 4.4. TECHNOLOGY MODERNISATION

In order to comply with Europe's regulatory framework for the Single European Sky (SES), the necessary actions and investments have been made, actively participating in groups such as SESAR or EUROCONTROL, in order to improve the overall performance of air navigation services.

In 2024, we upgraded and modernised the air navigation system by **incorporating new technologies to increase its efficiency and improve service quality, while updating and enhancing existing systems.**

### Automation

- Modernisation of the automated air traffic control system (SACTA), finalising the definition phase of **iTEC SkyNex**, a fundamental step for commissioning **SACTA-iTEC version 5.1** in all ENAIRe Route and TMA units.
- Technological improvements thanks to deployment of the R7 version of Hyperión, ENAIRe's Big Data ATM management platform and commissioning of the iCMON (iTEC Conforming Monitoring) phase 2 functionality which provides predictive support for control personnel to maintain compliance between flights and flight plans with greater operational awareness.
- Improved surveillance through the deployment of the ADS-B source management capability in SACTA for En-route, TMA and Tower units.

- Extension of the latest technologies in voice communications systems (COMETA) between control personnel and pilots in Barcelona En-route and TMA, Madrid En-route and completing deployment in Seville.
- Modernisation of the ATM system infrastructure. New Integrated Flexible Operational Control User-Centered System (iFOCUCS) control positions have been deployed to support advanced functionalities under development and accommodate technological evolution. The **iFOCUCS deployment was completed in the Valencia terminal area control centre**, in the new technical-operational building of the Madrid control centre and in contingency at the Canary Islands control centre.
- To facilitate flow management (ATFM), new versions of IMPACT have been deployed that incorporate functionalities such as sending complementary operational configuration data, occupancy regulations or scenario activation proposals to Eurocontrol, in addition to putting AMAN 2.0 into service with a new SACTA arrival manager algorithm that improves the order proposal made automatically by the System.



**Using resources more efficiently and promoting digitalisation.**



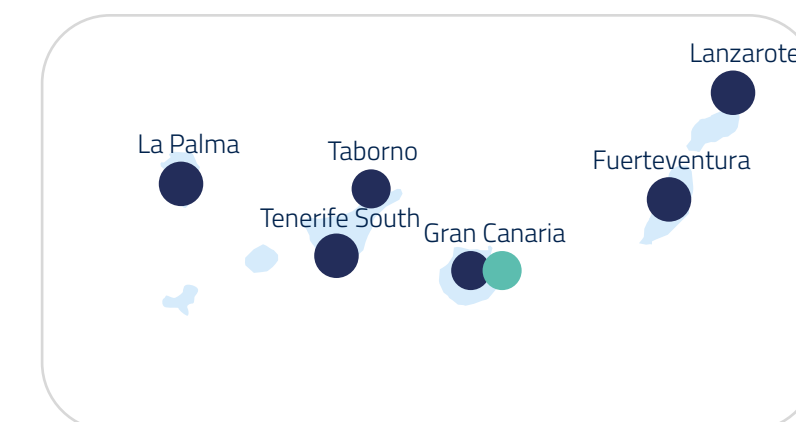
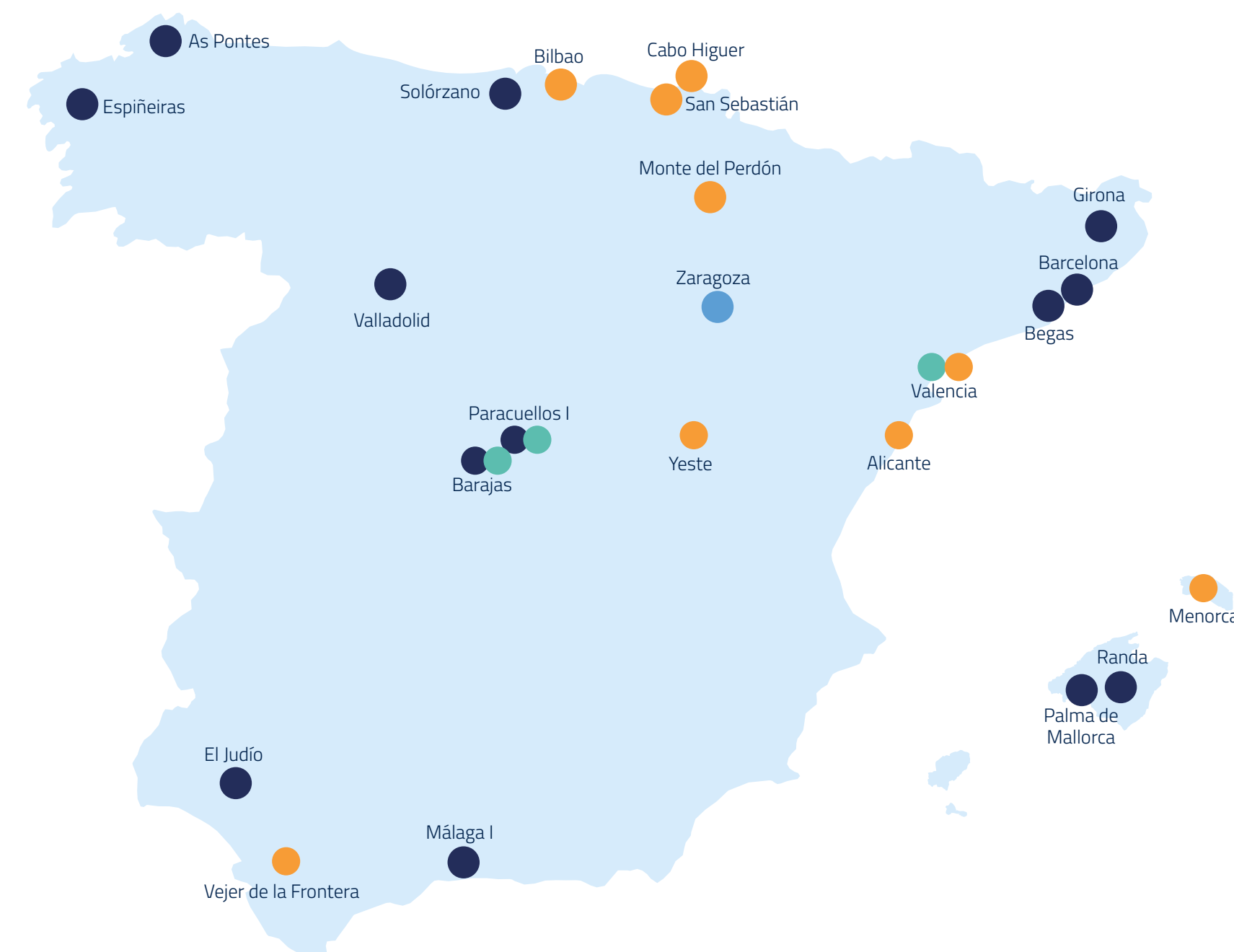


## Communications Systems

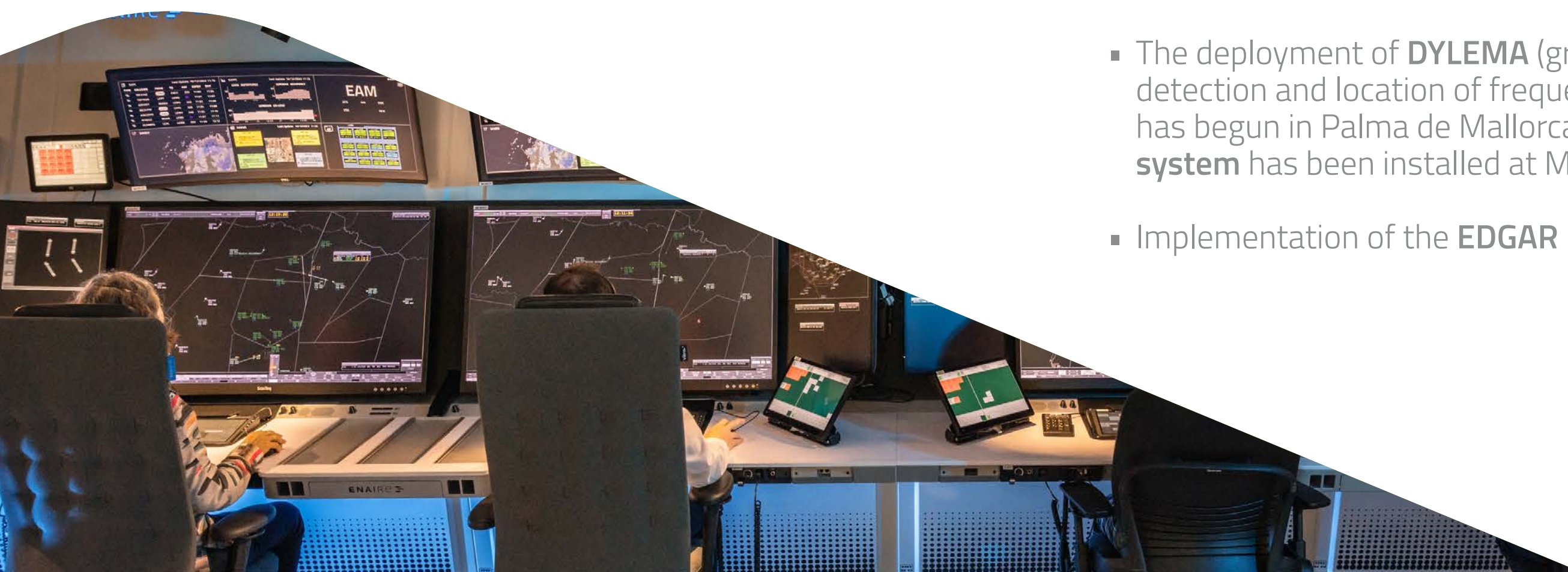
- Development and commissioning of the **new system gateway for CRAMI (Centralized Aeronautical Electronic Messaging System)** that allows for messages between **AMHS/SWIM technologies**
- The **deployment of IP voice gateways (VoIP GW)** has continued, allowing communication between voice communications systems used by air traffic controllers and ground radio systems that use different technologies.
- **New ground-to-air communications systems have been deployed at Defence sites in the Canary Islands** and ground-to-ground communications systems (fibre optics and radio links) have been renewed at airports and facilities in Mallorca, Randa, Melilla, Rastrogordo, Valencia, Aitana, Alicante and Girona.
- Commissioning of the **ORION system** in various communications centres, airports, and ground-to-ground loops, providing homogeneous and distributed remote monitoring and control of communications systems.

## Navigation and Surveillance Systems

- **Technical availability of the ADS-B surveillance functionality in SACTA** has been achieved and the **sensors in the standalone ADS-B stations** in Alicante, Yeste, Vejer de la Frontera, Menorca and Cabo Higuer, San Sebastián, Bilbao, Monte El Perdón and Valencia were activated in 2024. **ADS-B sensors integrated into the radars** at Lanzarote, La Palma, Fuerteventura, Tenerife South, Taborno, Gran Canaria Prov, El Judío, Málaga I, Begas, Girona, As Pontes, Valladolid, Solórzano, Palma de Mallorca, Paracuellos 1, Randa, Barcelona, Espiñeiras and Barajas were also activated in 2024. And **technical commissioning of ADS-B standalone** was carried out in Zaragoza.
- Carried out the first phase of the renovation to **Mode-S** in the Valencia radar and upgraded the Barajas radar (PRM) to **Mode-S**.
- Commissioning of the new **surface-motion radar (SMR)** in Barcelona and the **PSR 3D multi-frequency radar** in Paracuellos I and Gran Canaria.
- A total of **269 radio interference studies** have been carried out.
- The deployment of **DYLEMA** (ground-based system for the detection and location of frequency inhibitors or jammers) has begun in Palma de Mallorca and a **portable DYLEMA system** has been installed at Malaga airport.
- Implementation of the **EDGAR** project has begun.



- Commissioning of ADS-B Stations
- Activation of ADS-B sensors in radar heads
- S-Mode Radar/3D PRS
- Technical availability of ADS-B surveillance in SACTA





## 4.5. INTERNATIONAL EXPANSION

In 2024 ENAIRe actively participated, helping to coordinate the Call for Proposals and CEF funding bids within the framework of the SESAR Deployment & Infrastructure Partnership (SDIP) Consortium. SDIP is the consortium appointed by the European Commission to fulfil the role of **SESAR Deployment Manager** for the 2022-2027 period.

In addition, ENAIRe is a cornerstone of the initiative launched by the **A6 Alliance** to establish Common ATS Datalink Service Governance in Europe, following signature by the 27 European air navigation providers (ANSPs). During 2024, work advanced on the Common Procurement process for the joint selection of a **Datalink Service Provider** in 2025.

2024 saw the publication of the **SES2+ Sky Regulation** that establishes the rules for the creation and operation of the Single European Sky, in which ENAIRe has actively participated. The new regulatory text addresses the fragmentation of European airspace and aims to improve air traffic management in terms of safety, capacity, efficiency and sustainability. This framework allows for more innovative cross-border services within the internal European Union market and facilitates the reduction of infrastructure.



Building effective international partnerships in the public and public-private spheres, drawing on the experiences and strategies of all collaborators and partners.

ENAIRe chaired the Strategy Board for the A6 Alliance of the main European air navigation service providers, strengthening cohesion, coordination and cooperation among the main actors of the European ATM Network, including institutions and organisations



## 4.5. INTERNATIONAL EXPANSION

In April 2024, the **Spanish Local Single Sky Implementation Plan** was signed by representatives of the participating Spanish organisations, including ENAIRE, as a tool for planning and monitoring convergence of the different national plans for the evolution of air navigation systems towards achieving the Single European Sky.

Progress continues toward establishing a **European Performance Framework** for the fourth reference period (RP4: 2025-2029), with Union-wide performance targets being published in 2024.

During 2024, ENAIRE collaborated with its supervisory entity (AESA) in preparing the National Performance Plan for RP4 (ESPP4), which establishes the goals set for the period at the national level.

Approval of the new European ATM Master Plan in December 2024. ENAIRE contributed actively to its preparation in coordination with the different governing bodies of the SESAR 3 JU and the A6 Alliance. The Master Plan sets out the main reference in the evolution of air navigation systems, with the aim of achieving the European Digital Sky.

### Participation in CANSO Europe

As part of CANSO Europe, we have worked throughout 2024 on various aspects of relevance for air navigation providers to address a "Single Sky beyond SES2+" contemplating topics like the future of SESAR, summer 2024, the ATCO licensing and training systems, network volatility, on-demand capacity and aspects of safety, security, sustainability and resilience.

### 2023 ATM Awards Finalist (Resilience category)

The GAMMASIM VR project was recognized at Airspace World 2024



# 05

Our  
Commitment

5.1. STAKEHOLDERS

5.2. ENVIRONMENT

5.3. GOOD GOVERNANCE

5.4. OUR PEOPLE AND SOCIETY



## 5.1. STAKEHOLDERS

In 2024, we focused on strengthening our stakeholder relations to ensure optimal service for air transport users. To this end, we reviewed our Stakeholder Policy this year, maintaining both the internal and external coordination mechanisms and communication channels already established.

We held numerous meetings with clients and stakeholders to exchange information and discuss strategic and operational aspects, in particular at the PV2030 Conference where we discussed the values that should prevail at ENAIRE. Our Quality Management System has assessed the quality of the services offered, enabling us to orient our actions towards our stakeholders' needs and respond effectively to their communications.

Through our management system and materiality analysis, we gathered the information needed to understand our stakeholders' expectations and concerns in order to integrate them into our strategic management.

**We successfully completed the follow-up audits for our Quality Management and Environmental Management certificates, which confirm our adherence to high standards of quality and environmental protection in air navigation services**

### Our clients



**79.6%** (+3.1% compared to 2023)

**Highest historic level (target 77%)**

Global Perceived Quality Level (PQL) of the services provided by ENAIRE.

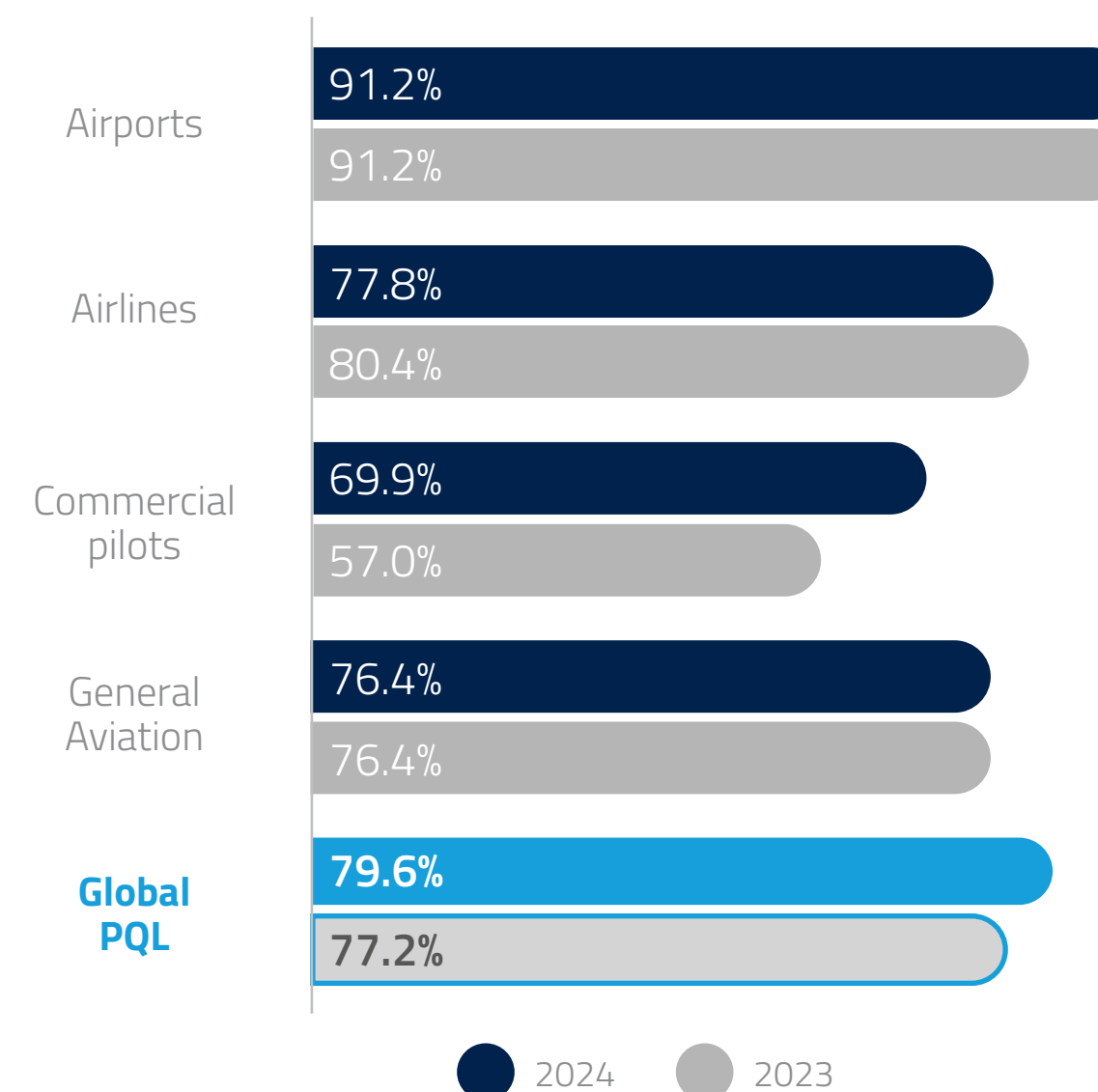


**69.9%** (+22.6% compared to 2023)

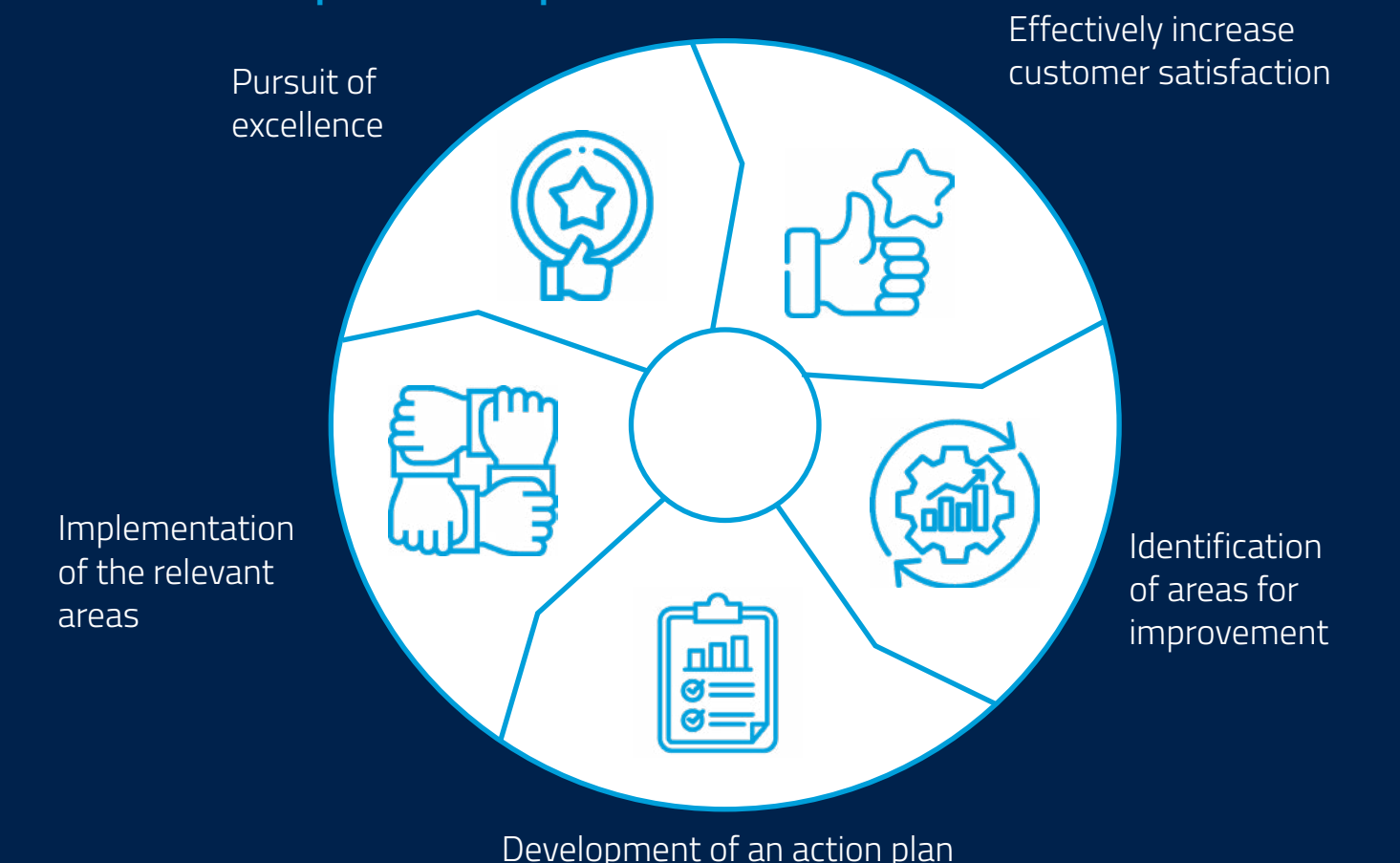
**Record high score**

Perceived Quality Level (PQL) of the services provided by ENAIRE among **commercial pilots**.

During 2024, we conducted satisfaction surveys among airlines and commercial pilots, updating the results of our Global PQL:



### Continous improvement process





## 5.2. ENVIRONMENT

At ENAIRe, we promote sustainable development through our "Green Sky" Environmental Sustainability Strategic Plan, our environmental policy and an Environmental Management System in accordance with the ISO 14001:2015 standard. In this way, we demonstrate our commitment to reducing the emissions associated with ENAIRe's operational and internal management and improving energy efficiency.

ENAIRe aims to achieve carbon neutrality by 2030, registering its carbon footprint annually with the Ministry for the Ecological Transition and Demographic Challenge (MITECO), with 2023 marking the third consecutive year of registration.

Thanks to the measures implemented by ENAIRe in 2024, in-flight efficiency across the Spanish route network reached 96.7%, surpassing the 2019 level of 96.3% and remaining stable despite record air traffic volumes.



**70%**  
Direct Flights



**21,700**  
T of fuel saved  
vs. 2019



**68,000**  
T of CO<sub>2</sub> avoided  
in 2024



**96.7%**  
Efficiency of  
the route network



**1.97**  
million nautical miles saved  
(equivalent to 3.65 million km or  
91 circumnavigations of the globe)



**2.6 GWh**  
of own-generated  
energy consumed  
(4% more than in 2023)



**+75%**  
lower carbon footprint  
in 2023 than in 2019





## 5.3. GOOD GOVERNANCE

### Policies

- Code of Ethics
- Human Rights Policy
- Diversity, Equity and Inclusion Policy
- Ethics and Compliance Policy
- Internal Information System and Whistleblower Protection Policy
- Criminal Compliance Policy
- Anti-Corruption and Fraud Policy
- Gifts and Hospitality Policy
- Safety Policy
- Just Culture Policy
- Sustainability Policy
- Environmental Sustainability Policy
- Stakeholder Policy
- Communication Policy
- Information Security Policy
- Personal Data Protection Policy
- Risk Control and Management Policy
- Data Governance Policy
- Integrated Management System (IMS) Policy
- ATC Fatigue and Stress Risk Management Policy

### Code of Ethics and Ethics Channel

The Governing Board is responsible for approving the Code of Ethics, implementing the Ethics Channel and appointing the Head of the Internal Information System.

### ENAIRe Code of Ethics Commitments

- Good governance and regulatory compliance
- Safety and Security
- Professional and ethical conduct
- Proper handling of information
- Healthy and safe working environment
- Emotional wellbeing
- Talent selection and development
- Equality, work-life balance and diversity
- Environmental protection, climate change and decarbonisation of the economy
- Prevent corruption and fraud
- Third-party relations
- Safeguarding ENAIRe's reputation



Providing safety, security and reliability as a robust institution committed to transparency.

**We are evolving ENAIRe's Corporate Criminal Liability Prevention Model into a certifiable Ethics and Compliance Management System, aligned with national and international standards, and encompassing both criminal and antitrust risks**

### Ethical Channel Indicators

Indicators	2024	2023
Number of Reports	15	19
Number of Inquiries	1	16



## 5.3. GOOD GOVERNANCE

When making decisions, ENAIRe's governing bodies apply efficiency, viability, and sustainability criteria, underpinned by an Integrated Risk Management System that ensures consistency with the organisation's strategic objectives.

### Main Risks in 2024

#### Strategic risks

Labour conflict resolution and workforce management

Regulatory framework, supervision and competition

Non-compliance with EU investment/subsidy plan

Regulatory and legal compliance

#### Operational risks

Continuity of services and response to incidents and crises

Major security event

Cybersecurity and physical security

Contracts for the provision of services

#### Financial risks

Liquidity and collection management

Macroeconomic and geopolitical uncertainty

#### Compliance/reputational risks

Good governance and regulatory compliance

Environmental sustainability and climate change

Legal claims and reputational damage

ENAIRe remains committed to promoting a culture of transparency within the organisation, adhering to the legal requirements of Law 19/2013, of 9 December, on transparency, access to public information and good governance, guaranteeing free access to its public information through its website and on the Ministry of Transport and Sustainable Mobility's Transparency Portal.

 **51** inquiries received



## 5.4. OUR PEOPLE AND SOCIETY

ENAIRe's staff are the main driving force behind the company's transformation and the key to our success. Thanks to their talent, professionalism and motivation, we were able to meet our strategic objectives in a context of air traffic expansion.

We are committed to stable employment and continue to grow to meet strategic challenges. The different job postings in 2024 resulted in the hiring of 227 permanent staff, of which 109 hires correspond to the First Group Agreement and 118 were for air traffic control positions.

**The Second Group Collective Bargaining Agreement has been signed, which lays the groundwork for a new collective agreement**

These principles were used to reach a final agreement on January 22, 2025. The future Collective Agreement is subject to final authorisation by the competent bodies and publication in the Official State Gazette (BOE).

**We have a strong commitment to society, diversity, sustainability and efficiency, and engage our employees in continuous improvement**



**4,284**  
people employed\*  
(+3.4% vs. 2023).



**35.83%**  
female staff



**150**  
new positions  
for air traffic  
controllers



**+3.46%**  
people in  
1st Group Agreement\*  
(2024 vs. 2023).



**96.69%**  
permanent  
contracts



**+3.35%**  
people in  
3rd Control Agreement\*  
(2023 vs. 2023).

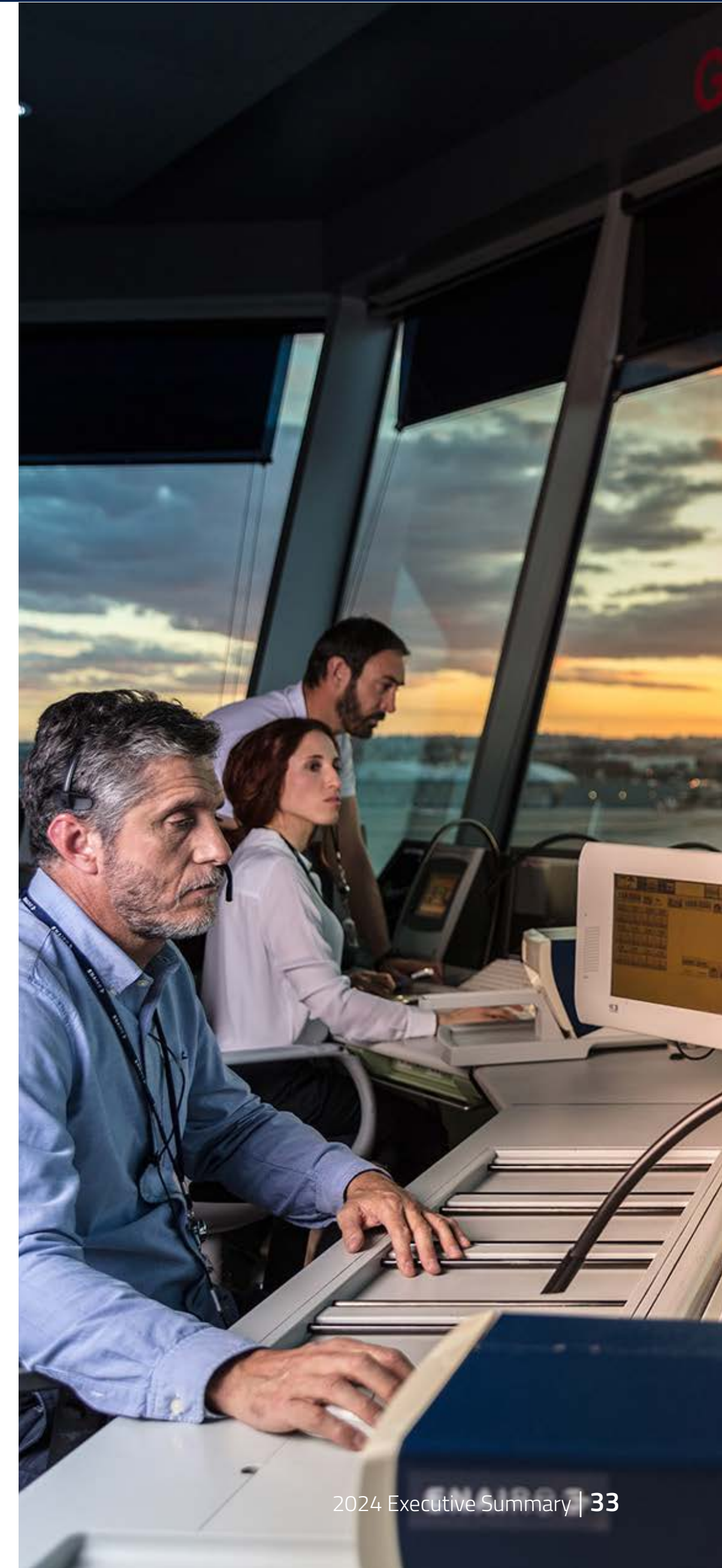
\*Figures refer to operational workforce, excluding Active Reserve (AR), Special Active Reserve (SAR), partial retirees, and temporary staff to avoid duplication.



Offering high-quality training and disseminating aviation culture.



Promoting employment and decent work for men and women.





## 5.4. OUR PEOPLE AND SOCIETY



### Diversity and equality

ENAIRe is committed to a respectful, diverse and inclusive work environment, under the umbrella of its Diversity, Equity and Inclusion Policy and its Equality Plan, which has further incorporated the real and effective equality of trans people in 2024. This year, we published a new Prevention Protocol and actions against situations of sexual harassment based on sex, sexual orientation and sexual identity or gender expression.

We want to highlight the activities carried out by ENAIRe's employee networks: En femenina, En igualdad, Proud ENAIRe and the group GANE (Support Group for Special Needs), as well as the celebration of commemorative events and participation and collaboration with other entities such as the STEM Women's Congress, the REDI Academy day of "Corporate Pride", collaborations with Inspiring Girls and ONCE Foundation, as well as promotion to the silver partner category of Ellas Vuelan Alto (Women Flying High), among others.

In 2024, we launched a new public call for grants to foundations and non-profit organisations that promote the inclusion in society of people with disabilities and we reinforced our commitment to diversity with the launch of the new ENAIRe 'Une experiencias' network, a new space for collaboration and generational diversity based on the pillars of respect, recognition and mutual learning.



### Corporate wellbeing

In 2024, our commitment to the wellbeing of employees has extended beyond the physical sphere to cover social, family, emotional and financial well-being, including the following key actions:

- Renewal of the PAe (People Support Plan)
- Launch of the Me jubilio (My Retirement) Plan and 360° support, a personal advisory service for ENAIRe staff to prepare their retirement
- Creation of awareness campaigns on occupational health and safety
- Implementation of the Te Atendemos (We're here for you) programme, a new service for ENAIRe employees



### Education, training and innovation

We make ENAIRe visible in order to attract talent, through conferences in educational centres (ENAIRe in the classrooms), student visits to our facilities and participating in job fairs and innovation forums, as well as events aimed at attracting the new generations to the aeronautical and aerospace sector. In addition, we collaborate with different universities throughout the country and participate in the Flow to the Future competition for students in secondary education together with the Cap Gemini Foundation. In 2024, we participated as speakers in the First Forum on Innovation, Talent and Aerospace Education (FITEA) aimed at attracting new generations to the aeronautical and aerospace sector. We promote innovation both internally, for our staff, and openly, through initiatives that bring startups closer to our sector.

We offer continuous training to our personnel and we offer the **Master's Degree in Air Navigation Services Management** (V edition), taught by ENAIRe together with the Polytechnic University and the Autonomous University of Madrid, which



**MASTER'S DEGREE  
IN AIR NAVIGATION  
SERVICES MANAGEMENT**

Register



## 5.4. OUR PEOPLE AND SOCIETY

 ibutes to training the future leadership of air navigation.  
**ENAIRe Solidarity**

Our commitment also includes collaboration with social causes by encouraging our staff to participate both in solidarity races and in different campaigns to respond to emergency situations, including, in 2024, an initiative carried out in collaboration with the Red Cross to help people affected by DANA.

We also work to reduce inequalities through our Aeronautical Solidarity Corner which, together with the entities Aviation without Borders, SEPLA-Ayuda, La Matica and Las Sillas Voladoras (The Flying Chairs), celebrated its first anniversary this year at the Museo del Aire y el Espacio (Air and Space Museum), fostering solidarity among our staff through collaboration in solidarity projects that mitigate the situations of people at risk of social exclusion in childhood and disability, with aviation as a uniting force.



### Responsible public procurement

We take measures to ensure that our suppliers comply with EU environmental, social and labour requirements.



### Circular economy with social purpose

We promote the Circular Solidarity Economy by promoting responsible consumption and helping vulnerable groups. Thanks to our collaboration with entities such as the SEUR Foundation for the collection of plastic caps, we support children with rare diseases, and together with the Madre Courage Foundation help people at risk of social exclusion through the collection of clothing and footwear. In 2024, together with this Foundation and support from the CREA Group at ENAIRe, we organised a campaign to collect and donate books for children and young people in Peru.



### Aviation culture

We spread aviation culture through the **ENAIRe Foundation**, whose purpose is **to inspire and educate** through exhibitions, activities and requests for grants to preserve aviation heritage.

Fundación  
**ENAIRe** 



**10** REDUCING INEQUALITIES



**12** SUSTAINABLE PRODUCTION AND CONSUMPTION





# 06

## Economic & Financial Position

6.1. ECONOMIC & FINANCIAL SITUATION

6.2. REVENUE

6.3. EXPENDITURES

6.4. INVESTMENTS



## 6.1. ECONOMIC & FINANCIAL POSITION

Air transport is a strategic sector for Spain due to its economic and social impact, as it contributes to connectivity, accessibility, cohesion and regional connectivity.

In this context, our activity has a direct impact on the development of air traffic, tourism and trade in our country.

**ENAIRe recorded an all-time record for flight management in 2024, with 2,358,988 flights, an increase of 7.6% compared to 2023 and 9.7% compared to 2019**

The increase over 2019 is 13.4% higher than the European average, and compared to 2023, ENAIRe exceeds the European average by 2.4%.

In 2024, **en-route unit rates** have increased by 14.7% in the Iberian Peninsula and 9.6% in the Canary Islands. Notwithstanding, they have remained below the average rates of the main European suppliers (Italy, France, the United Kingdom and Germany), at -18.4% in the Peninsula and -34.5% in the Canary Islands. In addition, they were aligned with the 2019 en-route unit rates (+2.3% in the Peninsula and +0.8% in the Canary Islands compared to 2019).

**Approach unit rates** for the year 2024 **did not increase** compared to those of 2023. The calculation of air navigation charges is governed by (EU) Regulation 2019/317 which establishes a common performance evaluation and charging system.

This legal framework includes a sharing of risks between ANSPs and airlines, mitigating the effects of possible variations in the costs of air navigation services and unforeseen traffic fluctuations. This translates into less uncertainty for airlines when estimating their operating costs in the short and medium term, while encouraging greater efficiency and cost control by the ANSPs.

Air navigation charges are set annually based on certain costs and traffic service units established in the National Performance Plan for a Reference Period, usually five years. The resulting annual charge also takes into account adjustments considered in the Regulations.

The Spanish Performance Plan for the period RP3 2020-2024 (ESPP3) was approved by the European Commission in April 2022 by publication in the Official Journal of the European Union (OJEU) of (EU) Decision 2022/776 of 18 May 2022.





ENAIRe's improved results are mainly attributable to the increase in traffic measured in service units (demand-based units that are charged to airlines), which exceeded by 7.5% those recorded in 2023, and the increase in en-route unit rates compared with the previous year, which was slightly higher than the en-route unit rates in 2019.

In addition, in 2024, ENAIRe received 586 million euros in dividends from Aena's 2023 results.

All these circumstances allowed for positive results in 2024, following four consecutive years of negative operating results.



## Overview

The operating result was €157.8M, compared to €-30.2M in the previous year, with a positive EBITDA of €269.1M, compared to €76.5M in the previous year.

€ **€1,085.1M** (+19.8%)  
Income

€ **€927.3M** (-0.9%)  
Expenditures

 **€269.1M** (+251.6%)  
EBITDA

RESULTS (Millions of Euros)*	2024	2023	% 2024/2023
Operating revenue	1,085.1	905.4	19.8%
Operating costs	927.3	935.6	(0.9%)
<b>Operating results</b>	<b>157.8</b>	<b>(30.2)</b>	<b>622.7%</b>
<b>EBITDA</b>	<b>269.1</b>	<b>76.5</b>	<b>251.6%</b>
<b>Financial results</b>	<b>586.5</b>	<b>358.1</b>	<b>63.8%</b>
<b>Profit before taxes</b>	<b>744.4</b>	<b>327.9</b>	<b>127.0%</b>
<b>Net profit for the year</b>	<b>599.5</b>	<b>459.1</b>	<b>30.6%</b>

\*Data for the 2024 financial year corresponding to the provisional closure on January 20, 2025, pending submission to the Governing Board and final approval.

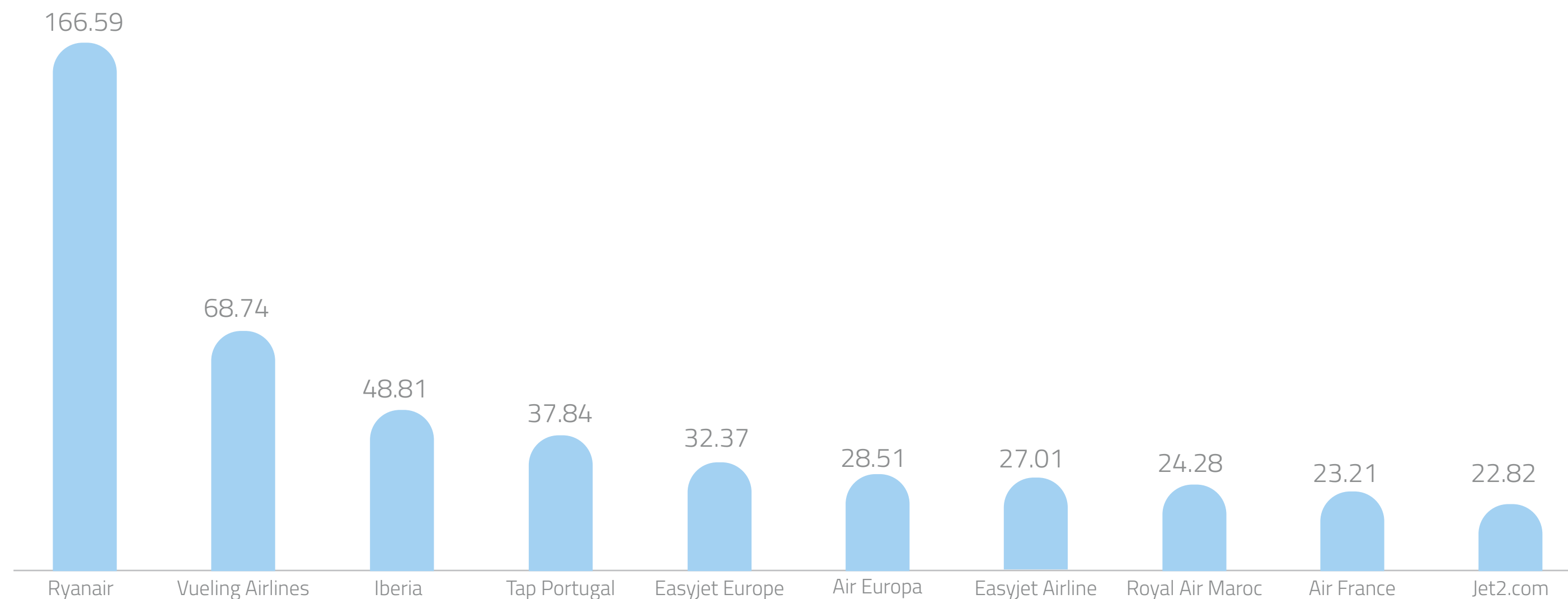


## 6.2. REVENUE

The highest revenue from air navigation services come mainly from en-route air navigation charges. Operating income increased by 19.8% thanks to the increase in air traffic and en-route charges.

Our turnover increased to 1,065.7 million euros in 2024, representing 175.8 million more than in 2023.

Revenue from the 10 companies that exceeded €20M in 2024



### 2024 vs. 2023

€+180M (+19.8%)  
Operating income

€+172M (+22.6%)  
For air navigation charges

OPERATING INCOME (Millions of €)*	2024	2023	% 2024/2023
<b>Turnover</b>	<b>1,065.7</b>	<b>889.9</b>	<b>19.8%</b>
Air navigation services	1,065.5	889.8	19.8%
En-route assistance services	896.9	727.8	23.2%
Approach assistance services	36.3	33.3	9.1%
Aerodrome services	119.2	120.3	(0.9%)
Publications and others	13.1	8.4	56.9%
Other services	0.2	0.2	4.9%
<b>Other income</b>	<b>19.4</b>	<b>15.5</b>	<b>25.1%</b>
<b>Operating income</b>	<b>1,085.1</b>	<b>905.4</b>	<b>19.8%</b>

\*Data for the 2024 financial year corresponding to the provisional closure on January 20, 2025, pending submission to the Governing Board and final approval.



## 6.3. EXPENDITURES

Operating costs reflect a decrease of 0.9% compared to the previous year. This minimal variation reflects efficient management of the entity while handling greater activity in 2024, with its operating costs being lower than those budgeted.

Procurement costs decreased 5.1% while personnel costs reached 651.6 million euros, compared to 649.3 million in 2023.

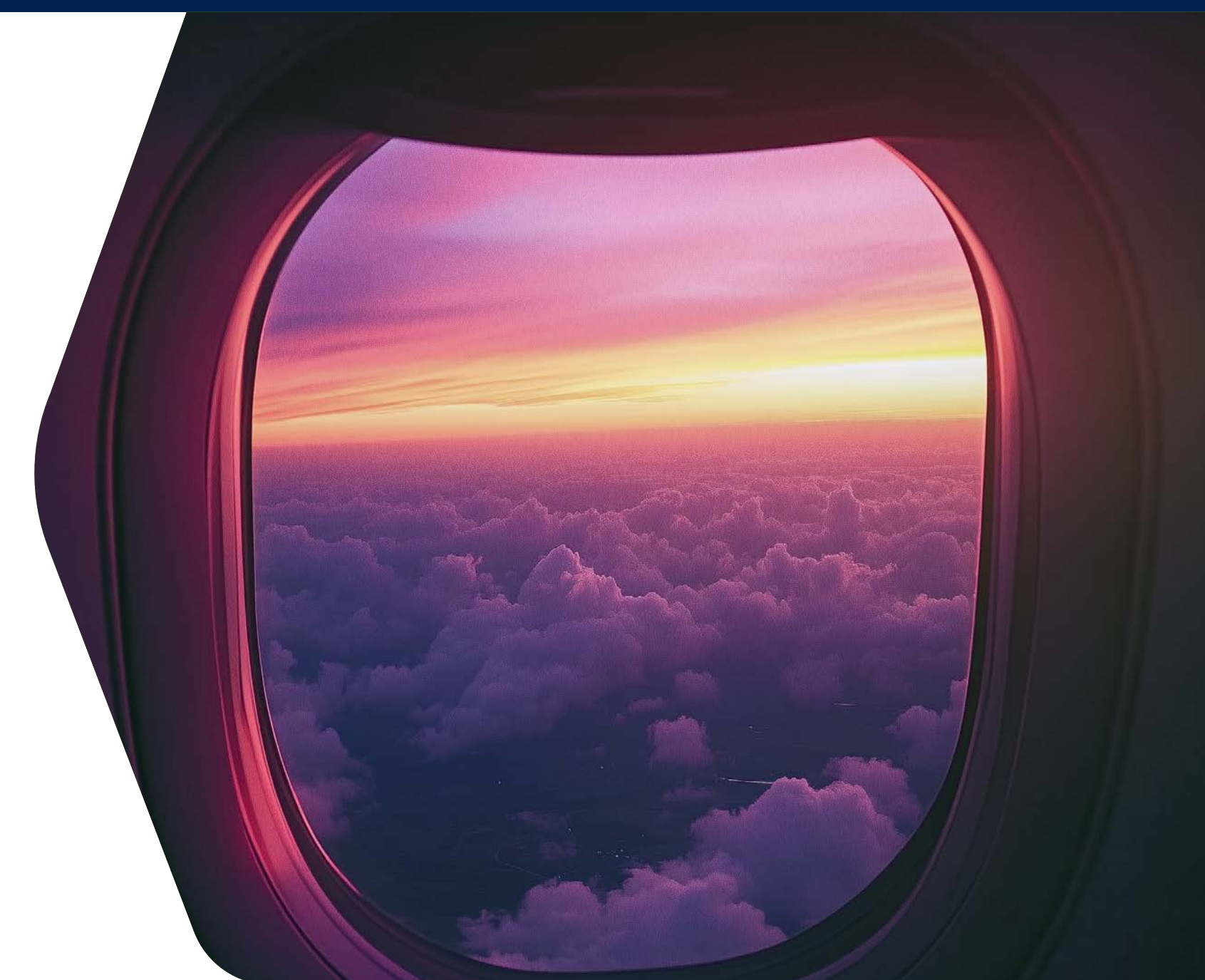
The 2024 figures include the 2.5% salary increase, the increase in workforce under both agreements and the increase in the contribution bases.

Other operating expenses decreased by 3.8% to 114.4 million euros, mainly as a result of the decrease in expenditures for electricity, IT communications, professional services and the contribution to Eurocontrol.

Depreciation of fixed assets amounted to 111.3 million euros, up 4.3% from 2023, mainly as a result of a higher depreciation provision for Computer Applications for new activations of this fixed asset.

OPERATING COSTS (Millions of €)*	2024	2023	% 2024/2023
Procurement	49.7	52.4	(5.1)%
Staff costs	651.6	649.3	0.3%
Other operating costs	114.4	119.0	(3.8)%
Depreciation	111.3	106.7	4.3%
Impairment and other results	0.3	8.2	(95.9)%
<b>Operating costs</b>	<b>927.3</b>	<b>935.6</b>	<b>(0.9)%</b>

\*Data for the 2024 financial year corresponding to the provisional closure on January 20, 2025, pending submission to the Governing Board and final approval.



### 2024 vs. 2023



**€-8.3M** (-0.9%)  
Expenditures



**€+2.2M** (+0.3%)  
Staff costs

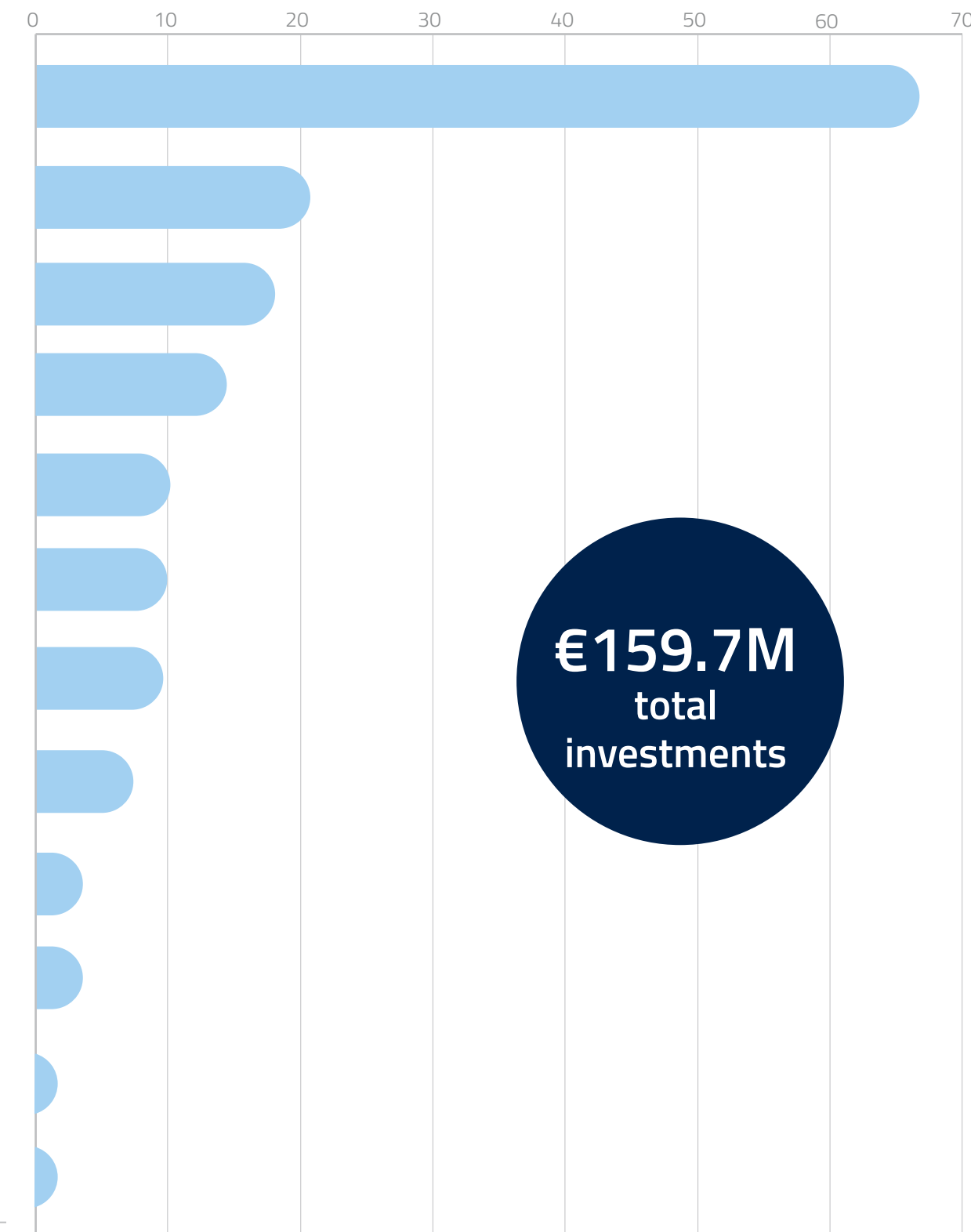


## 6.4. INVESTMENTS

### By Multi-Year Action Plan in 2024

Millions of €

Digital Air Traffic Control (ATM) Systems	63.7
Communications Systems (C)	20.9
Infrastructure Modernisation and Maintenance	18.5
ICT Systems	14.2
Airspace Design and Development and ATM Concepts	11.5
Navigation Systems (N)	10.4
Technical Operations	8.0
Surveillance Systems (S)	6.8
Aeronautical Information Service (AIS)	2.4
Drones	2.4
Sustainability	0.5
Other actions	0.5



ENAIRe's investments are primarily and cross-functionally directed toward improving and modernising its systems, digitising processes and implementing new technologies, always taking into account that the core focus of its investment strategy is operational and physical safety and cybersecurity, thus guaranteeing maximum reliability in air navigation. Thanks to this comprehensive vision, ENAIRe reinforces its commitment to a safe, efficient service aligned with the highest international standards.







For any questions or queries about this Executive Summary, please direct them to:

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