

Airline CEO declaration for a competitive and connected European Aviation Strategy

Europe's airline sector is at a critical turning point. Europe's leaders must now choose between growing connectivity and ensuring airline competitiveness, or higher fares and a cutback in routes. The large-scale airspace shutdowns in the Middle East are a reminder of our resilience and how important EU airlines and hubs are for connectivity with the rest of the world.

Europe wants and needs to fly. Air travel is now more accessible than ever, and demand is expected to increase by 3% in 2026 (Eurocontrol Jan 2026). A4E members fly almost 800 million passengers to over 2,700 destinations collectively – and every aircraft we fly is almost full (87-94% average). More routes and better connectivity are propelling economic growth, including parts of Europe never connected before.

We cannot continue to take for granted the progress that we have collectively achieved. EU airlines and passengers cannot keep absorbing ever-growing regulatory and cost burdens. European travellers pay more simply for flying within the EU, while we are already losing competitive ground to non-EU airlines, destinations and hubs that do not face similar regulatory obligations.

As heads of State and Government meet in Brussels today, we call for immediate corrective action to safeguard competitiveness and connectivity:

A pro-competitiveness EU aviation strategy 2.0

The EU must guarantee that its long-overdue update to the 10-year-old Aviation Strategy adopts a global and pro-growth aviation mindset, addressing the disproportionate and rising cost burden on EU airlines. Regulatory costs for A4E airlines have tripled since 2014 to €15.5 billion annually and are set to rise to €27.6 billion per year in 2030. European passengers and airlines cannot be left to shoulder the rising costs of sustainability, insufficient airspace capacity, delays and infrastructure investments alone – especially when Europe's neighbours are not subject to the same costs and regulations. Ultimately, this will make flying less accessible for many Europeans and benefit non-European airlines. Europe will also become less attractive as a destination, meaning fewer routes and poorer connectivity.

Bring ETS into line with CORSIA

The EU must rapidly bring down the cost of ETS. Today, European passengers and airlines are penalised simply for flying within Europe. For example, a family of four that flies from Belgium to Greece can pay €80 more in ETS costs, compared to a trip

to Turkey. To ensure fairness, ETS costs must be brought in line with the levels of CORSIA. ETS must not be extended to all departing flights from the EU. Instead, the EU must work towards strengthening CORSIA to make it the only carbon pricing system globally. There have also been calls from Member States to suspend ETS for certain sectors ahead of today's Council Summit. If there is a political choice to do so, this must also include aviation.

Bring down costs to achieve 6% SAF mandate, e-SAF sub-mandate now untenable

A4E members remain committed to decarbonising through the switch to sustainable aviation fuels (SAF), and we reiterate the need for immediate EU and government action to rapidly bring down the cost of SAF. The overall 6% SAF target of 2030 can be maintained, provided that SAF prices drop significantly.

However, eSAF remains a very nascent technology and the eSAF production sites that have reached final investment decisions (FID) are currently expected to produce a mere 0.71% of the volumes mandated under the 2030 EU eSAF sub-mandate (600kt) – that's a whopping 99.3% of e-SAF missing.

If fines were imposed due to a failing market, passengers would be forced to pay €7-9 billion of penalties, pushed onto airlines by fuel suppliers, with no environmental benefits. In these circumstances, the 2030 eSAF sub-mandate must be postponed until e-SAF is sufficiently available and affordable, and the regulatory framework is redesigned to support diverse, affordable production pathways.

To ensure a level playing field, costs on extra-EU routes not covered by the SAF mandate should be also addressed by a basket of measures, including a mechanism addressing carbon leakage – such as the [SAF-BAM](#) for passenger aviation.

EU261 reform risks higher passenger costs and less connectivity

The reform of EU261 is not just a political decision; it is a balancing act between operational realities and passenger rights in case of disruptions beyond airline control. What is being negotiated today behind closed doors is very far removed from the original Commission proposal. Higher EU261 costs risk harming connectivity and competitiveness more than even today's poorly designed rules – particularly as non-European airlines are not subject to the same obligations. A larger cost increase in line with the European Parliament's position would double today's annual cost of EU 261 to passengers and airlines to €15 billion. Connectivity will also suffer as data shows that a 1% rise in ticket costs leads to a 1.1% drop in passenger demand. Non-hub airports would be hit hardest, with damaging regional economic impacts.

Fix Europe's broken air traffic management system

Fragmented European airspace finds itself closed down due to air traffic controller strikes. A strike in just one member state can shut down arriving and departing

flights and also force overflying planes to detour. EU leaders must take this concern more seriously: require mandatory arbitration before a strike is even called, set a 21-day advance notice for any industrial action, protect overflights while ensuring local departures and arrivals are not impacted, and guarantee a right of redress for airlines.

Reform airport charges, maintain the slots regime

A targeted revision of the airport legislation package could lower airport charges by 17% - that's equivalent to €905 million in 2024. Reform would also allow independent regulators and airlines to have better oversight of how airport charges are used, in particular at large airports. Today's slot regime, on the other hand, need not be reopened, with slots being used well above 90% on average, and over 95% at major hubs.

A Europe that values aviation again

In today's global aviation market, EU airlines and passengers cannot keep absorbing ever-growing regulatory and cost burdens. Europe has a choice: keep Europeans and its businesses connected and airlines thriving, or turn back the clock on connectivity and competitiveness. The right to fly is fundamental, and flying is and always will be an integral part of the EU's transport infrastructure. Europe must bring back a pro-competitive mindset.