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Building the Airspace for Aviation Growth

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You cannot grow aviation without growing the system that makes it move.

Do we treat ATM and airspace as a strategic national infrastructure?

They connect markets, unlock airport and airline capacity, support economic development — and increasingly depend on digital infrastructure that must be financed before demand arrives.



194 members

96 ANSPs

90% of world air traffic

The global voice of airspace

Bringing together ANSPs, technology and service providers — and working with airlines, airports, regulators and the wider aviation ecosystem.

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The future is arriving much faster than the infrastructure behind it.



Modernisation is no longer a technology programme.

It is an infrastructure investment programme.

Digital ATM & automation
Smarter operations and decision-making

CNS modernisation
Resilient, high-performance communications, navigation and surveillance

Cyber resilience
Protecting systems that keep aviation moving

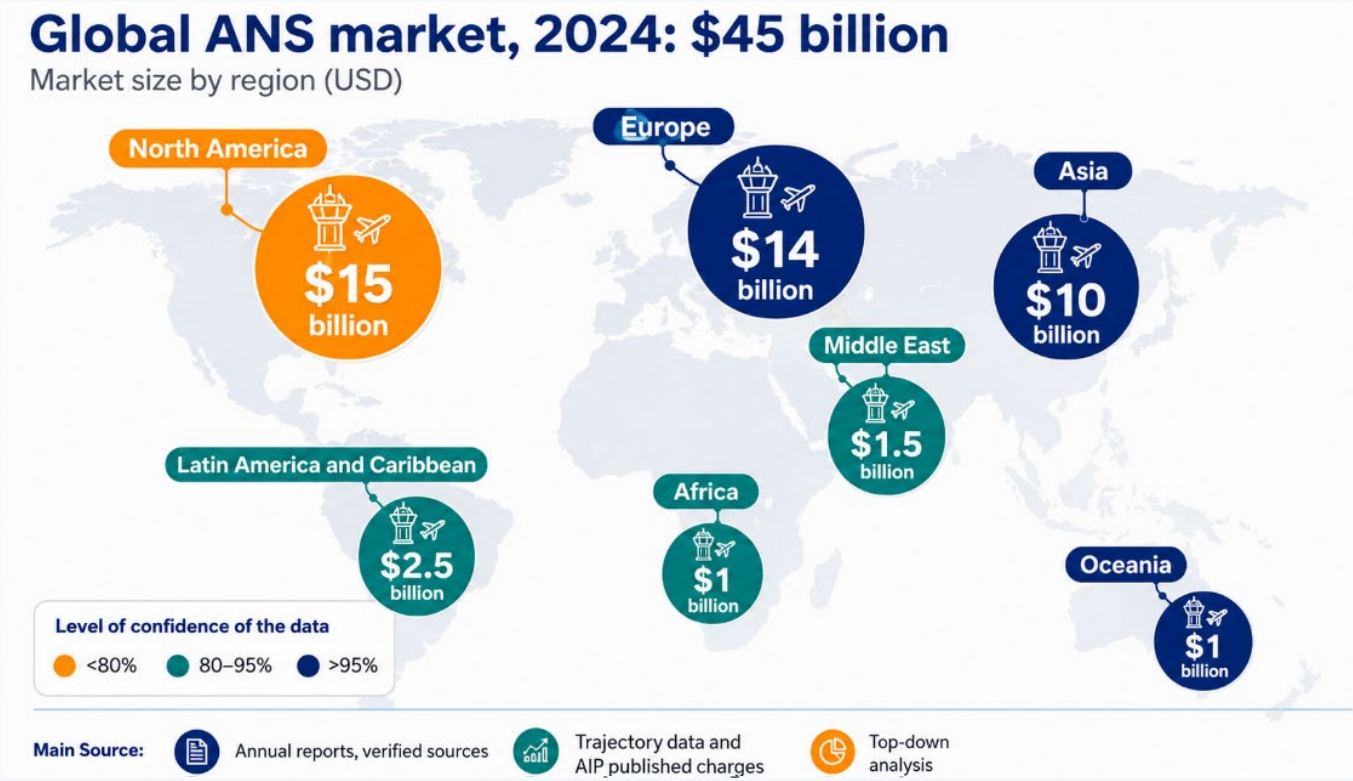
Airspace redesign
Maximising capacity through smarter airspace

Skills & institutions
People, capabilities and organisations ready for the future

Innovation & partnerships
Working together to unlock solutions and scale faster

? The question for States is not only "what should we modernise?" — but "how do we finance it sustainably?"

The global ANS market is USD 45 billion — and modernisation requires sustained investment.



MODERNISATION SIGNALS

UNITED STATES

USD 12.5bn

Initial federal commitment to modernise the US air traffic control system.

EUROPE

EUR 11.4bn

Estimated investment need, 2025–2035, for strategic deployment objectives.

Illustrative programmes — not a consolidated global estimate.

$ The next investment wave extends beyond physical infrastructure: digital services, cybersecurity, automation and information-sharing.

THE OPPORTUNITY FOR ATCONF/7

Treat ATM investment as an enabler of aviation growth — not a consequence of it.



PLAN FOR GROWTH

Integrate ATM modernisation into national infrastructure and economic plans.

ENABLE INVESTMENT

Create the conditions for sustainable, predictable investment over the long term.

ALIGN AND CONNECT

Strengthen coordination to maximise impact, avoid gaps and deliver global interoperability.

The future of aviation will be built in the airspace as much as on the ground.

CANSO stands ready to work with ICAO, States and the wider aviation community to make it happen.

THANK YOU

Simon Hocquard | President & CEO, CANSO

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