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**ASSEMBLY — 41ST SESSION**

**TECHNICAL COMMISSION**

**Agenda Item 32 Aviation Safety and Air Navigation Regional Implementation Coordination Mechanisms**

**PRIORITIES FOR ACTIVITIES AND MEASURES TO SUPPORT CIVIL AVIATION IN THE RECOVERY FROM AND AFTER THE PANDEMIC**

(Presented by the Interstate Aviation Committee)

**EXECUTIVE SUMMARY**

In 2020 and 2021, the world air transport industry faced the necessity to survive in the conditions of the pandemic of the new dangerous coronavirus COVID-19. The present document contains information on the practical proposals, developed within the framework of the ICAO-IAC Project RER/01/901 (COSCAP-CIS), for supporting aviation industries of the States of the region - Members of the interstate Agreement on Civil Aviation and Airspace Use in the conditions of the overcoming of the crisis caused by the COVID-19 pandemic.

<i>Strategic Objectives:</i>	This information paper is related to the Strategic Objectives “Flight Safety”
<i>Financial implications:</i>	Without any financial implications
<i>References:</i>	HLCC 2021 – WP/170

<sup>1</sup> English and Russian versions provided by IAC.

## 1. INTRODUCTION

1.1 The COVID-19 pandemic has drastically changed the socio-economic conditions of the international civil aviation activity. The widespread introduction of restrictions for the international and domestic flights, lockdown for any citizen movement have undermined the steady trend of the passenger air traffic growth, have put the aviation industry on the brink of the large-scale systemic crisis with the termination of the operation of the thousands of aircraft, collapse of all kinds of airport activity, the threat of losing highly qualified jobs. The people's psychology and behaviour model have changed: the fear of using the public transport and preference for the online format in the organization of business meetings and conferences will be influencing the demand for air transportations for a long period of time.

1.2 The direct correlation dependence between the real disposable income of the population and the demand for air transportations, which had been functioning prior to 2019, was continued in the conditions of the pandemic. The reduction in the real disposable income of the population because of the suspension of the functioning of the enterprises and organizations, including small and medium business, in the conditions of the quarantine restrictions was accompanied by the rapid drop in the demand for air transportations, which was considerably enhanced by the cancellation of regular international flights in all of the States of the region - Members of the interstate Agreement and partial cancellation of domestic flights in some of these States.

1.3 The recovery after the pandemic and further progressive development of the passenger and cargo traffic will continue to be based on the use of the ICAO Standards and Recommended Practices (SARPs), as well as on the consecutive implementation of the Agreement on Civil Aviation and Airspace Use.

## 2. DISCUSSION

2.1 The growth of the volume of the air transport activity of the States of the region - Members of the interstate Agreement in the period 2016-2019 corresponded to the long-term ascendent trend of the civil aviation development not only in the region, but also globally. In 2020, there was a drastic change in the progressive trend towards the increase in the values of the key indicators of the civil aviation development in the region. Beginning from 2021 a gradual recovery of the passenger air traffic has begun, in the first place due to the outpacing growth in the domestic airline segment.

2.2 In 2020 the passenger turnover on the scheduled and non-scheduled airlines decreased to 180.5 billion psg-kms, that is by 54.9% as compared to 2019. By this indicator the civil aviation of the States of the region - Members of the interstate Agreement was thrown 10 years back (in 2010 this index was 180.2 billion psg-kms). Passenger traffic was reduced by 49.7% as compared to 2019 and the total ton-kilometres – by 45.4%. In 2021 the recovery growth of the passenger turnover amounted to 63% compared to 2020, but its value (294.3 billion psg-kms) was still 26.4% lower than in the pre-pandemic 2019. However, both indicators also remained respectively 17 and 17.5% lower than the pre-pandemic 2019 values.

2.3 The termination of the international air transportations, several months of the “lockdown” in the majority of the States of the region - Members of the interstate Agreement led to the even more considerable reduction in the air transport passenger turnover as compared with the alternative modes of transport. The share of the civil aviation in the total passenger turnover of all modes of transport of the States of the region - Members of the interstate Agreement was reduced by 26.4% in 2020, i.e. approximately to the level of 2015.

2.4 The pandemic has led to the abrupt, more than twofold, decline in the population mobility in the States of the region - Members of the interstate Agreement in 2020. However, thanks to the developed market of domestic air traffic in a number of States, in the first place, in the Republic of Kazakhstan, the Russian Federation and the Ukraine, the aviation mobility of the population in the States of the region - Members of the interstate Agreement in 2020 was by 40% higher than the world average. In 2021, the aviation mobility of the population increased to the level of the period 2014-2017.

2.5 The efficiency of the aircraft use in the airlines of the States of the region - Members of the interstate Agreement in the period 2015- 2019 had the tendency to rise, but it has abruptly decreased in the period of the pandemic, which was accompanied by putting the aircraft to “storage”, some aircraft were returned to the leasing providers. Having dropped significantly in 2020, the percentage of the passenger seat occupancy began to recover, and in the domestic airlines segment in 2021 there was a recovery up to the level of the pre-pandemic 2019.

2.6 The termination of the international air communications in 2020 in connection with the pandemic has inflicted considerable damage to the airport activity, which has seriously influenced the volume of the work, in the first place, of the international airports of the States of the region - Members of the interstate Agreement.

2.7 Beginning from the last months of 2020 the civil aviation in the region has begun a slow recovery, which continued in 2021 and which was problematic and unstable depending on the epidemic situation in the States of the region - Members of the interstate Agreement, but domestic air transportations have been recovering more confidently.

2.8 IAC considers that thanks to the extensive vaccination programs, adherence to the safety protocols, implemented by the aviation industry in accordance with the recommendations of ICAO, International Air Transport Association (IATA) and other international organizations, the situation in the air transport industry has improved significantly by the beginning of 2022. At the same time, airlines, airports and other industry stakeholders still need to receive the maximum possible support from the States.

2.9 Being aware of the fact that the Governments of the States of the region - Members of the interstate Agreement and the international organizations have developed and are implementing the corresponding programmes and measures, IAC is recommending the following:

- a) within the frame of the procedures, established in the States of the region - Members of the interstate Agreement, and provided that the requirements of the sanitary and epidemiological standards are fully complied with, allow the airlines to restore international air communication on every route, which has existed before the pandemic, up to the level of 100% from the volume of 2019 to the beginning of the spring-summer navigation period of 2022;
- b) consider the possibility of the further allocation of financial resources in the form of the direct, non-reimbursable subsidies to the enterprises, including these for the additional costs of the sanitary and epidemiological protection measures to business capital;
- c) the Governments should consider additional measures to expand the budget subsidies to the airlines for the transportations on the socially significant routes, as well as the stabilization of the aviation fuel prices for the autumn-winter period of 2022/2023;

- d) consider the possibility of compensating from the budget of the airlines for the maintenance of the necessary qualification of the “temporarily surplus” flight and technical personnel as a measure to maintain flight safety, as well as the expenditures for the preservation and depreservation of excess aircraft;
- e) analyze the possibility of fixing all regulated rates and charges for the airport and air navigation services at the level of 2019 up to the end of the autumn-winter period of 2022-2023, at the same time providing for the budget allocation mechanism, if it is necessary, to the airports and air navigation service enterprises;
- f) work out and adopt the coordinated (uniform) sanitary and epidemiological requirements and protection measures; and
- g) CAAs of the States should actively participate in the ICAO Collaborative Arrangement for the Prevention and Management of Public Health Events in Civil Aviation (CAPSCA) medical program.

2.10 The desired result of the implementation of the recommendations is the recovery of the air transport industry as one of the important driving factors of the full economic recovery in the region after the COVID-19 pandemic.

### 3. CONCLUSION

3.1 The participants of the 41st ICAO Assembly Session are invited to take into consideration the information on the situation in the region and the recommendations stated in the present document.

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