

**Ninth Meeting of AFI Directors-General
of Civil Aviation (DGCA/9)**

Post-COVID Air Traffic Recovery and Outcomes of HLCC

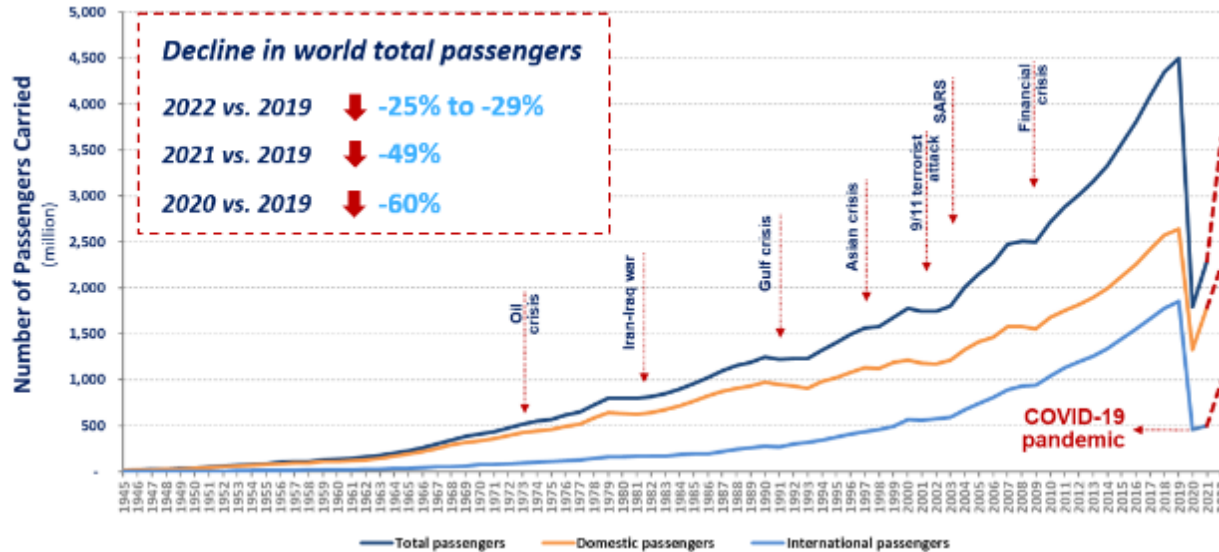
**Presentation by Mohamed Rahma
Director, Air Transport Bureau**





Economic Impact of the COVID-19 on Aviation

World passenger traffic evolution 1945 – 2022



- Drastic reduction in traffic with substantial impact on industry financials
- Slow recovery in passenger traffic, especially international traffic
- Resilience in freight traffic benefiting from the less impacted consumer consumption and trade

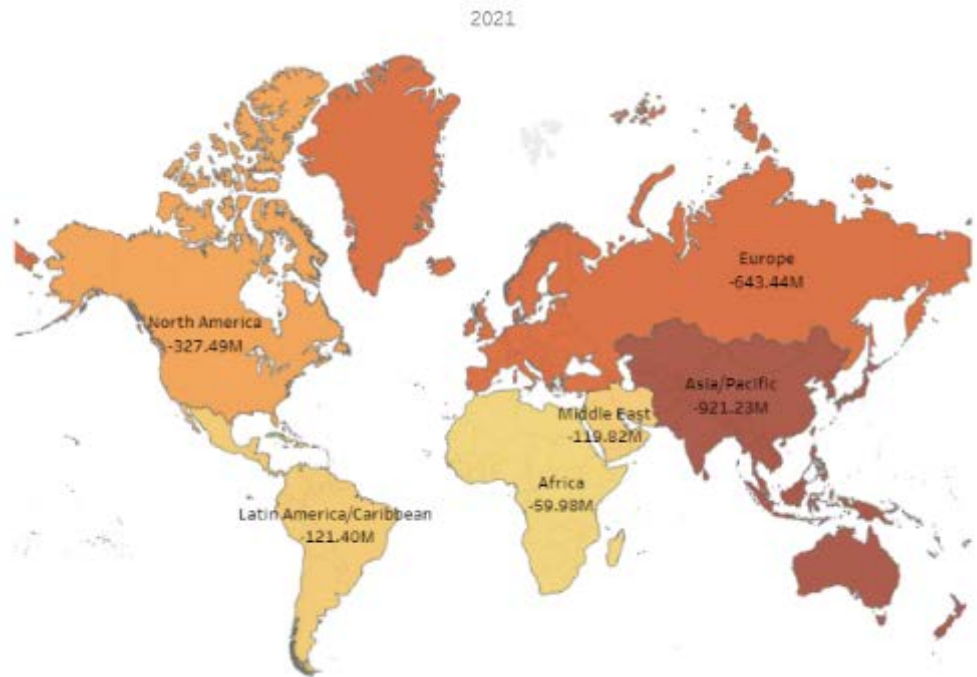
The COVID-19 impact on world scheduled passenger traffic for year 2020 (actual results), compared to 2019 levels:

- Overall reduction of **50% of seats offered by airlines**
- Overall reduction of **2.7 billion passengers (-60%)**
- Approx. **USD 372 billion loss** of gross passenger operating revenues of airlines

The COVID-19 impact on world scheduled passenger traffic for year 2021 (preliminary estimates), compared to 2019 levels:

- Overall reduction of **40% of seats offered by airlines**
- Overall reduction of **2.2 billion passengers (-49%)**
- Approx. **USD 324 billion loss** of gross passenger operating revenues of airlines

Passenger traffic decline by region

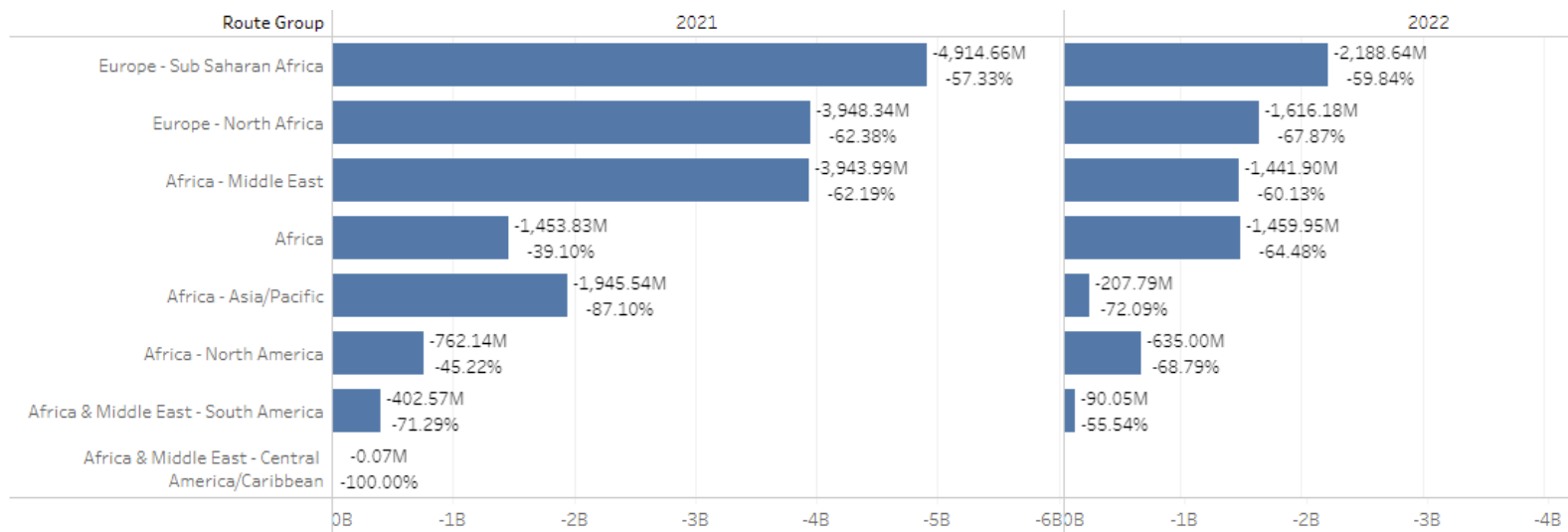


Regions	2021
Africa	-59.98M -52.1%
Asia/Pacific	-921.23M -54.8%
Europe	-643.44M -55.5%
Latin America/Caribbean	-121.40M -35.3%
Middle East	-119.82M -64.1%
North America	-327.49M -32.7%
Grand Total	-2,193.36M -48.9%

Passenger traffic evolution - Africa



Airline financial impact - Africa





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Outcome of the HLCC

Leading up to the ICAO HLCC

- Council Aviation Recovery Task Force (CART)
- CART Report Phase I – call for a high-level meeting on COVID-19

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CART

COUNCIL AVIATION RECOVERY TASK FORCE

REPORT



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ICAO'S HIGH-LEVEL CONFERENCE ON COVID-19



- 12 to 22 October 2021
- Fully virtual
- 1,786 representatives
- 129 States
- 38 International Organizations



**Participation of
the Conference**

Structure of the Conference

Ministerial Plenary

- 3 sessions

Safety Stream

- Agenda 1-5

Facilitation Stream

- Agenda 6-10

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ICAO'S HIGH-LEVEL CONFERENCE ON COVID-19



Main Outcomes of the ICAO HLCC



- international review of pandemic priorities
- new commitments to open borders through updated risk management and vaccination approaches
- build back better to address future pandemic resilience

One Vision for Aviation Recovery, Resilience and Sustainability beyond the Global Pandemic

Ministerial Declaration



Key commitments:

- Support a multilayer risk management strategy for international civil aviation, which is adaptable, proportionate, non-discriminatory and guided by scientific evidence
- Facilitate air transportation of vaccines, essential medical supplies and personnel
- Provide support for the aviation sector, including economic and financial support
- Ensure operational readiness of aviation personnel as well as airworthiness of aircraft
- Ensure the interoperability and mutual recognition of, and accessibility to, digital applications

One Vision for Aviation Recovery, Resilience and Sustainability beyond the Global Pandemic

Ministerial Declaration



Key commitments (continued):

- Promote a harmonized and inclusive approach to facilitate safe international air travel
- Establish bilateral, regional or multilateral Public Health Corridors or similar arrangements
- Support ICAO's work to provide guidance on an exit strategy from existing risk management measures
- Support long-term resilience of international aviation by enhancing its crisis response capability
- Recognize the contribution of aviation to climate change and the challenges
- Develop mechanisms for providing assistance to States to overcome the pandemic



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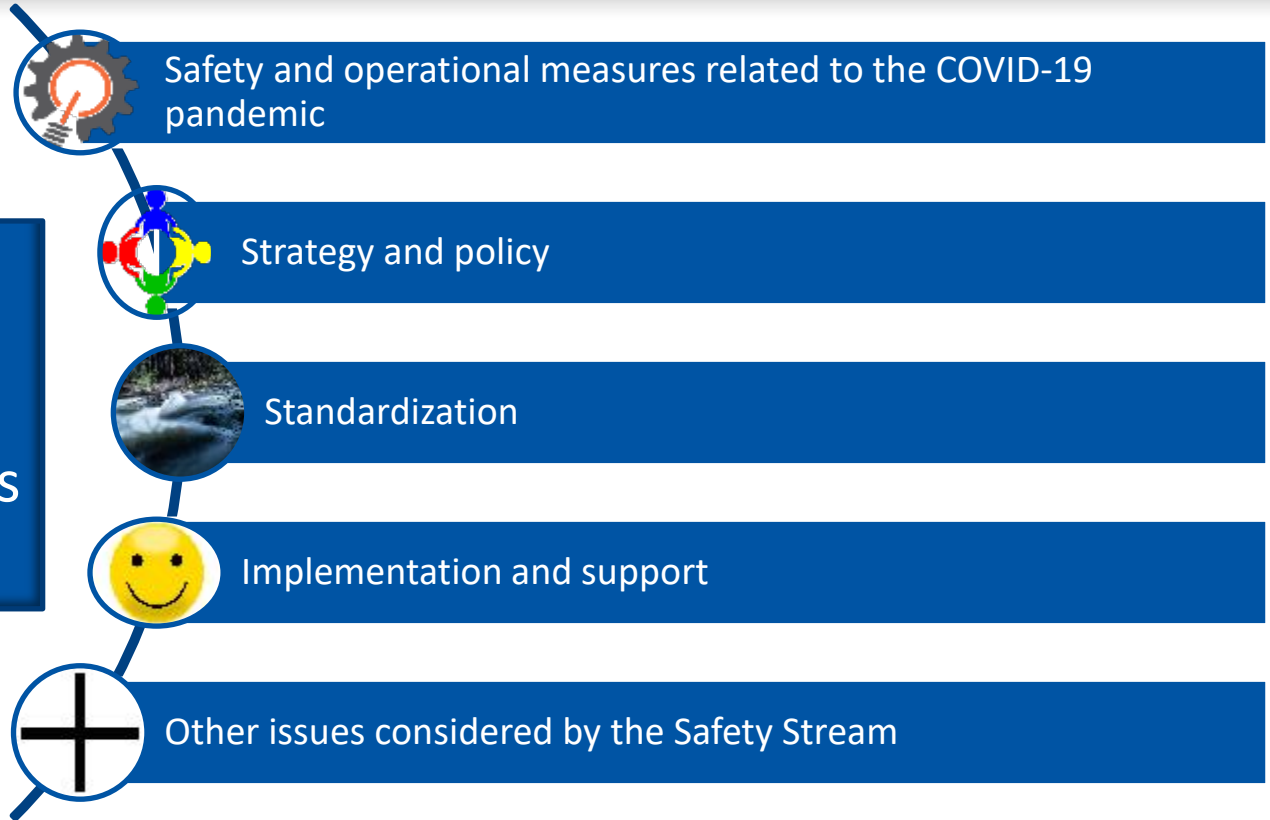
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SAFETY STREAM

147

Recommendations





Safety and operational measures related to the COVID-19 pandemic

Recommendations – 25 for States
23 for
ICAO

- ❖ Rapid response to global aviation disruption events
- ❖ Additional measures to ensure effective oversight and training
- ❖ Additional measures to support the return to normal operations
- ❖ The impact of COVID-19 on operational fitness

Strategy and policy

Recommendations – 17 for States
14 for
ICAO

- ❖ Draft 2023-2025 Edition of the Global Aviation Safety Plan
- ❖ Development and implementation of national aviation safety plans
- ❖ Regulatory capacity enhancement, new training approaches and improvement of current processes and tools to embrace changes in aviation
- ❖ Other issues related to safety oversight



Standardization

Recommendations – 18 for States
23 for
ICAO

- ❖ Oversight and new approaches
- ❖ Furthering the regulatory framework for UAS
- ❖ Improving the effectiveness of aviation safety risk management
- ❖ Oversight of ground handling



Implementation and support

Recommendations – 8 for States
6 for
ICAO

- ❖ Enhancing safety by advancing and strengthening regional cooperation
- ❖ Increasing participation in the contributory bodies of planning and implementation regional groups (PIRGs) and regional aviation safety groups (RASGs)



Other issues considered by the Safety Stream

Recommendations – 6 for States
7 for
ICAO

- ❖ Accident and incident investigations
- ❖ Universal Safety Oversight Audit Programme (USOAP) Continuous Monitoring Approach (CMA)
- ❖ COVID-19 impact on the Global Air Navigation Plan
- ❖ Global aeronautical distress and safety system (GADSS)
- ❖ Mitigating the risk of 5G implementation to safety-critical radio altimeter functions



FACILITATION STREAM

79

Recommendations



Facilitation operational measures - the pandemic and beyond



Enhancing national coordination and international cooperation



Enhancing digital data sharing for seamless/contactless processes



Future approaches – management of sustainable health-related FAL measures, passenger experience and implementation monitoring



Other Facilitation-related issues

Facilitation operational measures – the pandemic and beyond

Recommendations – 17 for States
5 for ICAO

- ❖ Comprehensive and frequent risk assessments critical with a view to easing measures
- ❖ CART recommendations as an underpinning element
- ❖ Harmonization where feasible, enhancing mutual recognition and trust
- ❖ Usefulness of PHCs currently and in future
- ❖ Digital health certificate implementation -> consider ICAO VDS-NC or something interoperable with it
- ❖ Necessity of internal and international cooperation and capacity building

Enhancing National Coordination and International Cooperation

Recommendations – 16 for States

6 for

ICAO

- ❖ Multidisciplinary cooperation within unified frameworks - NATFP/NATFC, tactical task forces, CAPSCA,...
- ❖ Continuous monitoring of compliance with Annex 9 provisions with clear assignment of responsibility
- ❖ Use of passenger data for health purposes, sharing according to clear legal basis
- ❖ On-going enhancement of international capacity building structures and capabilities

Enhancing digital data sharing for seamless and contactless processes

Recommendations – 13 for States

- ❖ Digital health proofs -> issuance aligned with WHO recommendations, interoperable with ICAO VDS-NC, subject to clear regulatory framework
- ❖ Integration of health proof validation in border inspection systems
- ❖ Possible use of platforms to enrol passenger health data in advance, use of iAPI
- ❖ Following ICAO SARPs and guidance on digitalization to assure sustainability moving forward, including for biometrics
- ❖ Share experiences and knowledge to enhance global capabilities

Future approaches - management of sustainable health-related FAL measures

Recommendations – 8 for States
4 for
ICAO

- ❖ Importance of implementing relevant Annex 9 SARPs and generally assisting transport of persons with disabilities and elderly passengers, especially in abnormal times
- ❖ Support for this work through funding and allocation of corresponding human resources
- ❖ Development of a strategic framework for implementation of mitigation measures to deal with public health emergencies at borders

Other Facilitation related issues

Recommendations – 8 for States
2 for
ICAO

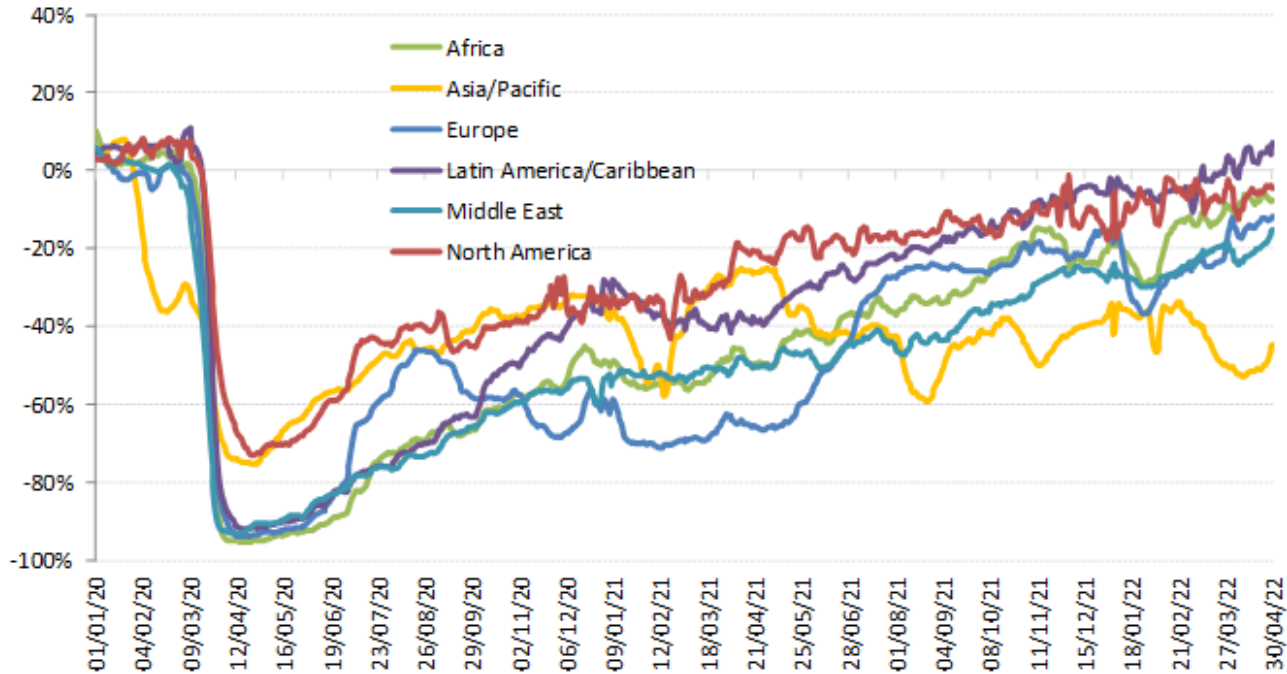
- ❖ Need to establish legislation, regulations, policies and/or plans related to support of assistance to aircraft accident victims and their families
- ❖ Reinforcement of efforts to deal with unruly and disruptive passengers
- ❖ Encouragement of ratification of the Montréal Protocol 2014 and consideration of the ICAO *Manual on the Legal Aspects of Unruly and Disruptive Passengers* (Doc 10117)
- ❖ Recognition of the need to respect and maintain existing agreed bilateral/regional air transport agreements in future crises, even where any mutually agreed interim measures are introduced



Post COVID-19 Air Traffic Recovery



Trend of Air Travel Recovery by Region (compared to 2019 levels)



Near-term Outlook for the Year 2022 - Global

The COVID-19 impact on world scheduled passenger traffic for year 2022 (estimated results), compared to 2019 levels:

- Overall reduction of **19% to 22% of seats offered by airlines**
- Overall reduction of **1,123 to 1,292 million passengers (-26% to -30%)**
- Approx. **USD 169 to 191 billion loss** of gross passenger operating revenues of airlines

International passenger traffic (2022, vs. 2019)

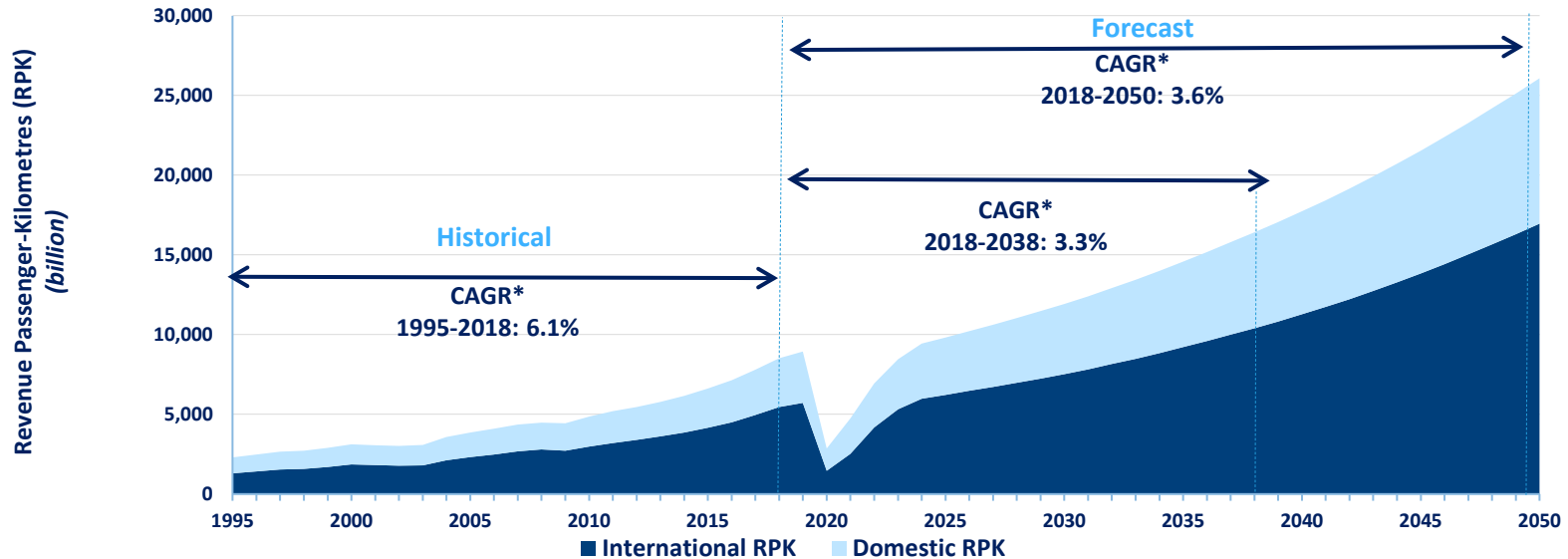
- Overall reduction of **26% to 30% of seats offered by airlines**
- Overall reduction of **603 to 697 million passengers (-33% to -38%)**
- Approx. **USD 126 to 142 billion loss** of gross operating revenues of airlines

Domestic passenger traffic (2022, vs. 2019)

- Overall reduction of **14% to 16% of seats offered by airlines**
- Overall reduction of **520 to 595 million passengers (-19% to -23%)**
- Approx. **USD 43 to 49 billion loss** of gross operating revenues of airlines



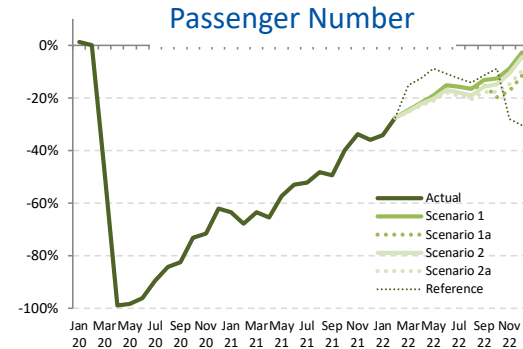
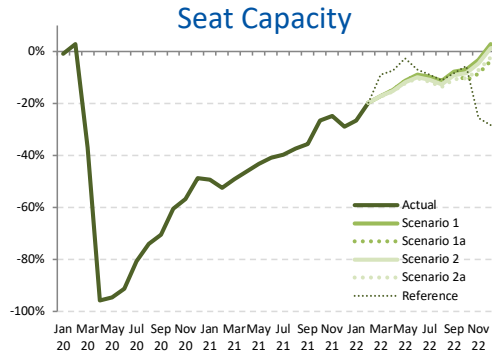
ICAO long term passenger traffic forecasts* (Global)



- Global traffic is forecasted to grow by 3.6% CAGR for the period 2018-2050
- International and Domestic traffic are forecasted to grow by 3.6% and 3.5% CAGR respectively



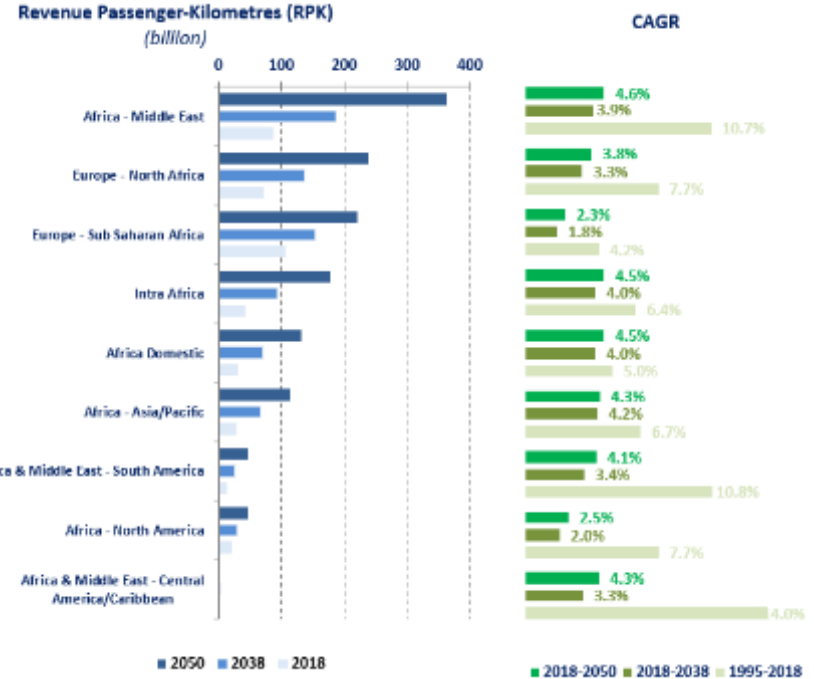
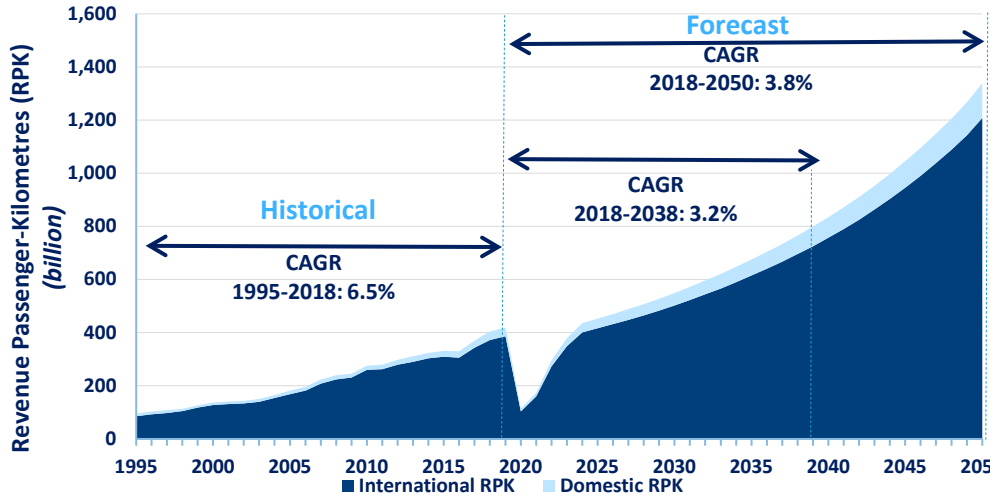
Near-term Outlook for the Year 2022 - Africa



Compared to 2019	Seat capacity (%)			Passenger number (thousand)						Passenger revenue (USD, million)		
	Total	International	Domestic	Total		International		Domestic		Total	International	Domestic
1Q 2020	-12.2%	-15.1%	-7.3%	-4,356	-16.1%	-2,922	-17.2%	-1,434	-14.3%	-736	-606	-130
2Q 2020	-93.8%	-93.8%	-93.9%	-27,097	-97.9%	-17,687	-97.9%	-9,410	-97.7%	-4,639	-3,786	-853
3Q 2020	-75.1%	-77.7%	-70.1%	-27,117	-85.5%	-18,507	-87.8%	-8,610	-81.1%	-4,734	-3,954	-780
4Q 2020	-55.3%	-61.8%	-44.5%	-19,886	-68.8%	-13,715	-75.8%	-6,171	-57.2%	-3,548	-2,989	-559
Total 2020	-59.6%	-63.1%	-53.5%	-78,456	-68.0%	-52,831	-71.2%	-25,625	-62.4%	-13,657	-11,334	-2,323
1Q 2021	-50.2%	-56.0%	-40.6%	-17,539	-64.9%	-12,231	-72.0%	-5,308	-52.7%	-3,161	-2,680	-481
2Q 2021	-43.4%	-54.2%	-23.5%	-16,235	-58.6%	-12,715	-70.4%	-3,520	-36.6%	-3,049	-2,730	-319
3Q 2021	-37.6%	-40.9%	-31.4%	-15,829	-49.9%	-11,383	-54.0%	-4,445	-41.9%	-2,903	-2,500	-403
4Q 2021	-26.8%	-31.9%	-18.6%	-10,574	-36.6%	-7,731	-42.7%	-2,843	-26.4%	-2,024	-1,766	-258
Total 2021	-39.3%	-45.5%	-28.4%	-60,177	-52.2%	-44,061	-59.4%	-16,116	-39.2%	-11,138	-9,677	-1,461
1Q 2022	-20.4% to -20.4%	-29.0% to -29.0%	-5.9% to -5.9%	-7,527 to -7,527	-27.8% to -27.8%	-6,333 to -6,333	-37.3% to -37.3%	-1,194 to -1,194	-11.9% to -11.9%	-1,503 to -1,503	-1,395 to -1,395	-108 to -108
2Q 2022	-10.9% to -10.5%	-15.5% to -14.9%	-2.5% to -2.3%	-4,828 to -4,593	-17.4% to -16.6%	-3,913 to -3,733	-21.7% to -20.7%	-915 to -860	-9.5% to -8.9%	-967 to -924	-884 to -846	-83 to -78
3Q 2022	-10.5% to -8.9%	-15.3% to -13.2%	-1.4% to -0.7%	-5,175 to -4,347	-16.3% to -13.7%	-4,373 to -3,725	-20.7% to -17.7%	-803 to -622	-7.6% to -5.9%	-1,061 to -909	-988 to -852	-73 to -56
4Q 2022	-8.1% to -3.7%	-15.3% to -10.2%	3.8% to 6.7%	-4,481 to -2,471	-15.5% to -8.6%	-4,050 to -2,666	-22.4% to -14.7%	-431 to 195	-4.0% to 1.8%	-1,023 to -673	-983 to -690	-39 to 18
Total 2022	-12.0% to -10.7%	-18.3% to -16.6%	-1.2% to -0.4%	-21,292 to -18,938	-18.5% to -16.4%	-18,278 to -16,457	-24.6% to -22.2%	-3,153 to -2,481	-7.7% to -6.0%	-4,441 to -4,008	-4,168 to -3,783	-286 to -225



ICAO long term passenger traffic forecasts* (Africa)

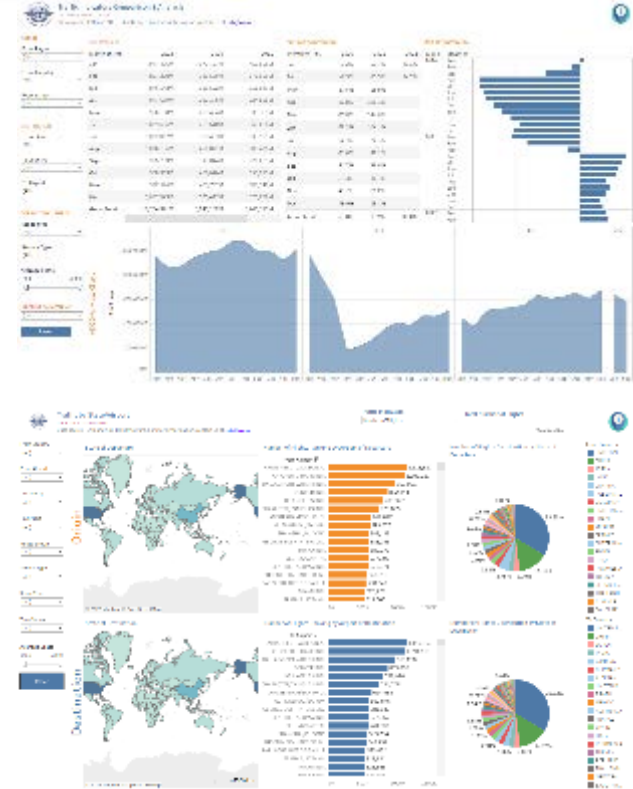


- Africa traffic is forecasted to grow by 3.8% CAGR for the period 2018-2050. International and domestic traffic are forecasted to grow by 3.7% and 4.5% respectively
- Africa-Middle East, intra Africa and Africa-Asia/Pacific are fastest growing international route groups in the region with 4.6%, 4.5% and 4.3% forecast CAGR respectively



ICAO Air Traffic Dashboards

- Interactive dashboards developed using Tableau platform, which provide **visualization** and **customized querying capabilities**
- cover a **wide array of analytics** ranging from operations, fleet usage, passenger carried, Flight Information Region (FIR) traffic, and revenue impact on airlines, airports and air navigation services providers (ANSPs) at different levels of granularity
- Dashboards will be presented to the ICAO Council in June 2022. Member States will be provided with one free license
- Expected to be valuable to the ICAO Council and Member States in their **current and post COVID-19 pandemic planning and implementation efforts**





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NEXT STEPS





Follow-up Actions to the Outcomes of the HLCC

ICAO's priorities and actions



- Increase the uptake of the HLCC Ministerial Declaration to restore and revitalize aviation sector.
- Provide support and guidance for States to develop multilayer risk management strategies for international civil aviation.
- Promote the interoperability and mutual recognition of digital solutions to restore and strengthen the confidence in air travel by the public, governments and international community
- Strengthen the international framework and arrangements for a coordinated and streamlined response to future crises
- Work with States, financial institutions, international partners and the private sector to support the financial viability of the aviation sector
- Invite A41 to review the progress and determine further actions that may be needed



ICAO Air Service Negotiation Event (ICAN) 2022

Abuja, Nigeria

12 to 16 December 2022

Hosted by Nigeria



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THANK YOU!

