

**THIRD MIDDLE EAST DIRECTORS GENERAL  
OF CIVIL AVIATION DGCA-MID/3  
VIRTUAL MEETING  
7 December 2020**



*International Civil Aviation Day*



# **Economic and Operational Impact of COVID-19 on the Air Transport System**

**Mr. Mohamed Khalifa Rahma  
Director, Air Transport Bureau, ICAO**

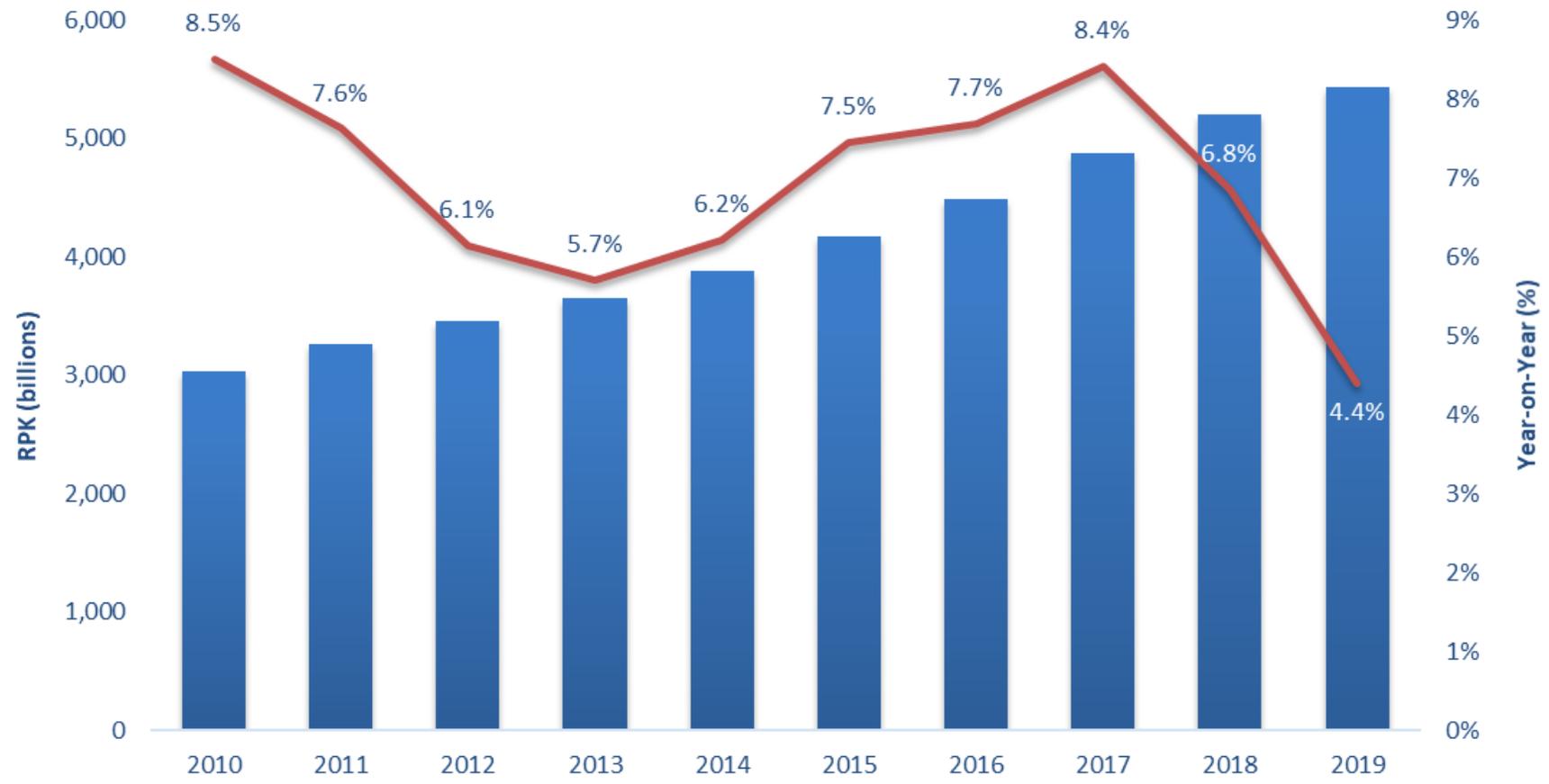


# Pre COVID-19 2019 Traffic Results



# Passenger traffic trend 2010-2019

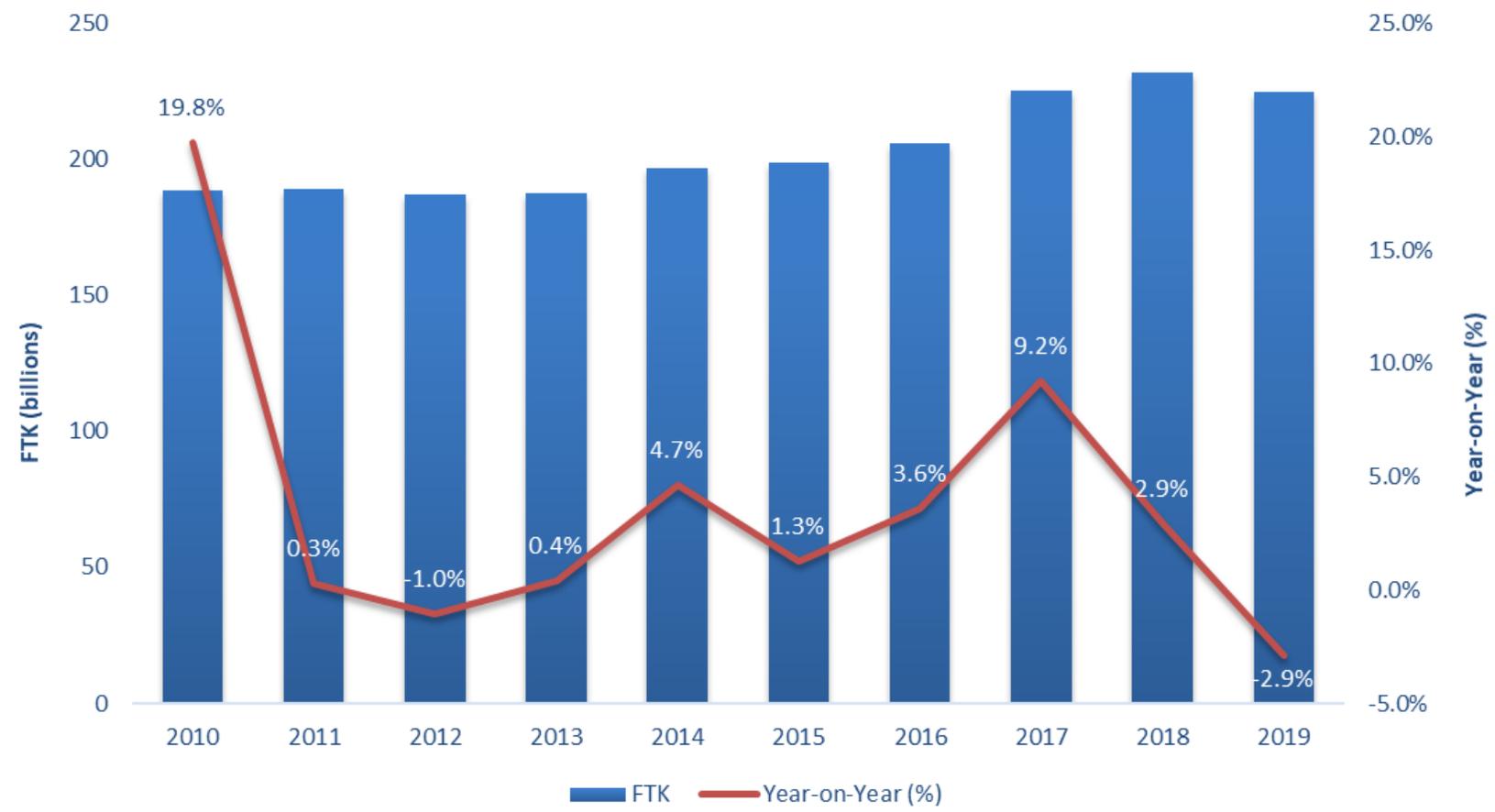
## Revenue Passenger Kilometres 2010-2019 (World Total)





# Freight traffic trend 2010-2019

## Freight Tonne Kilometres 2010-2019 (World Total)





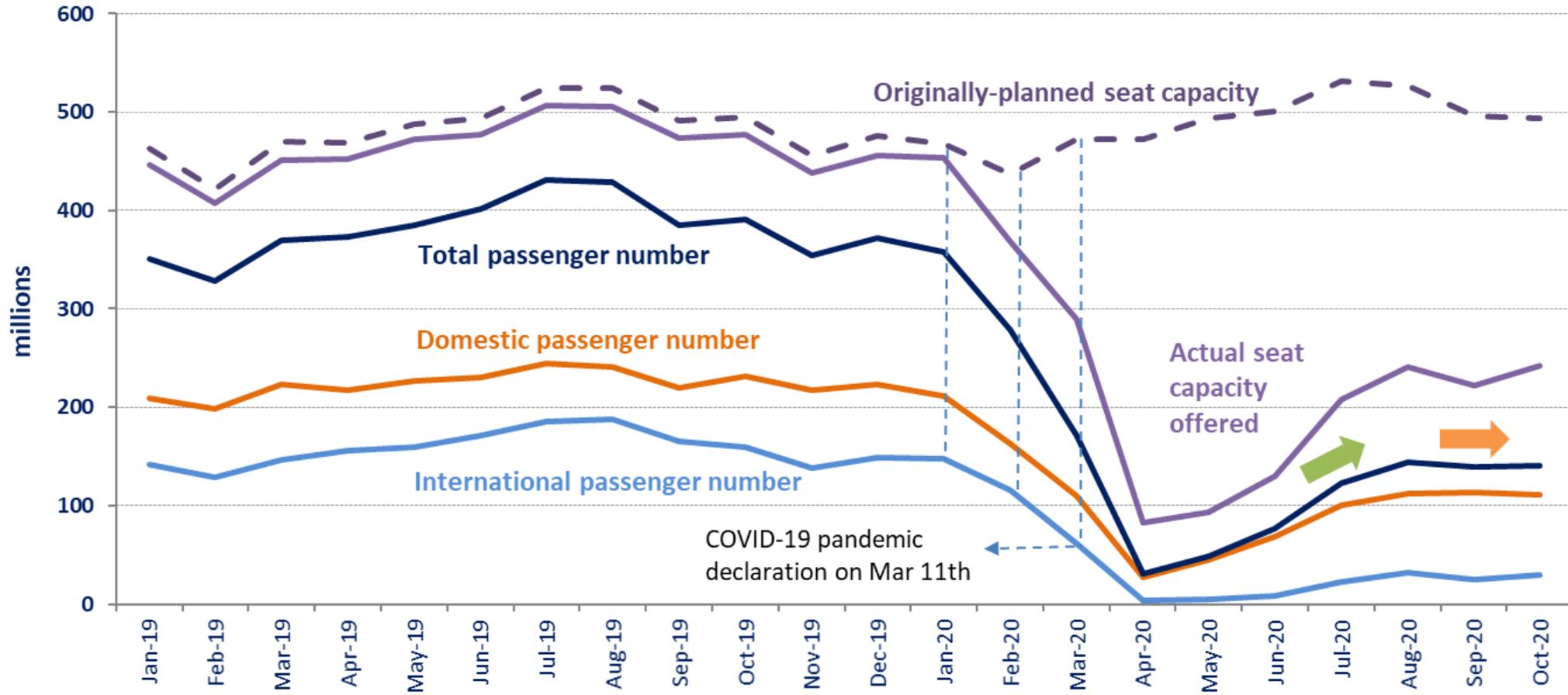
# Pandemic Year 2020 Impact on Global Aviation





# Drastic capacity cut along with dramatic drop in demand

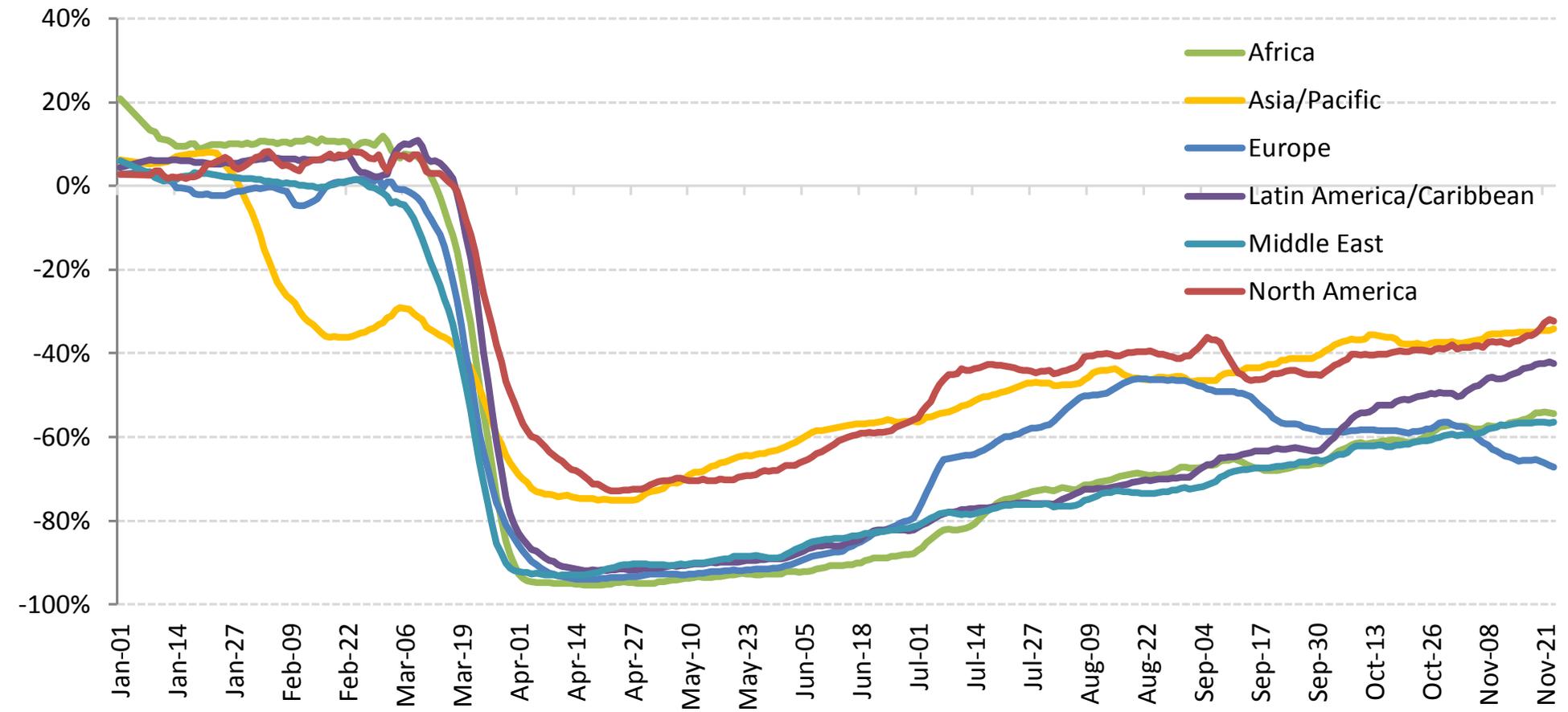
## Comparison of passenger numbers and capacity (Domestic travel is leading the recovery)





# Regional difference in resilience and speed of recovery

## Comparison of total seat capacity by region (7-day average, YoY compared to 2019)

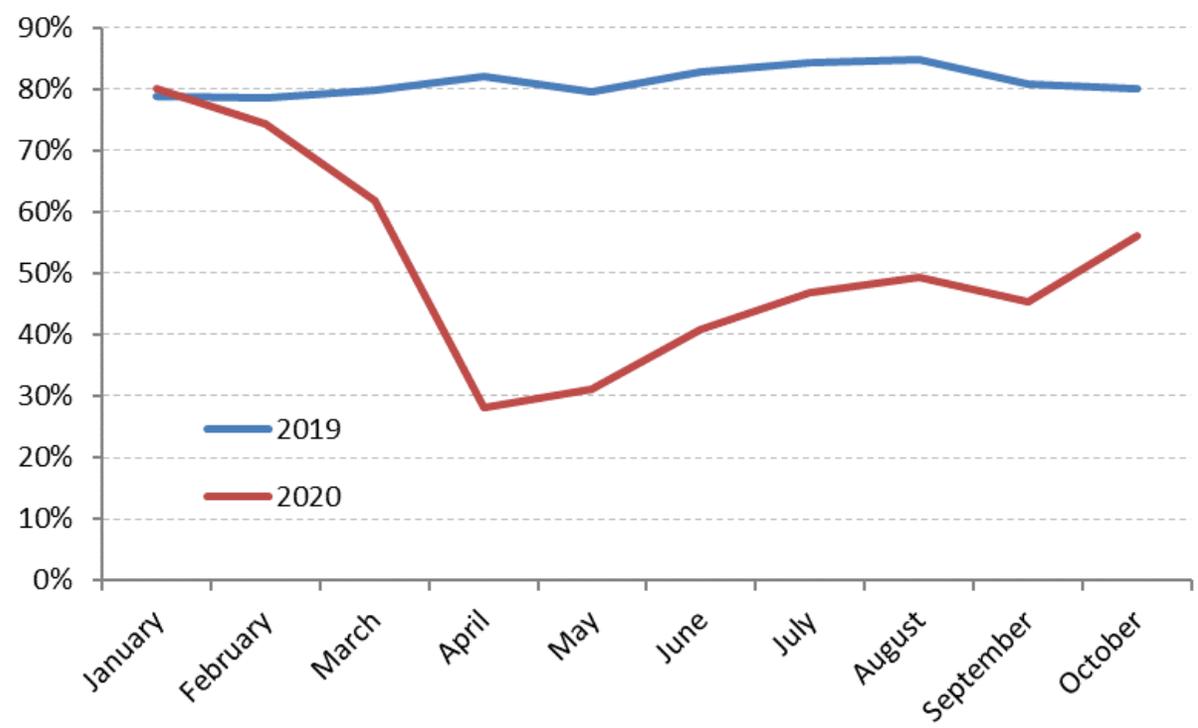




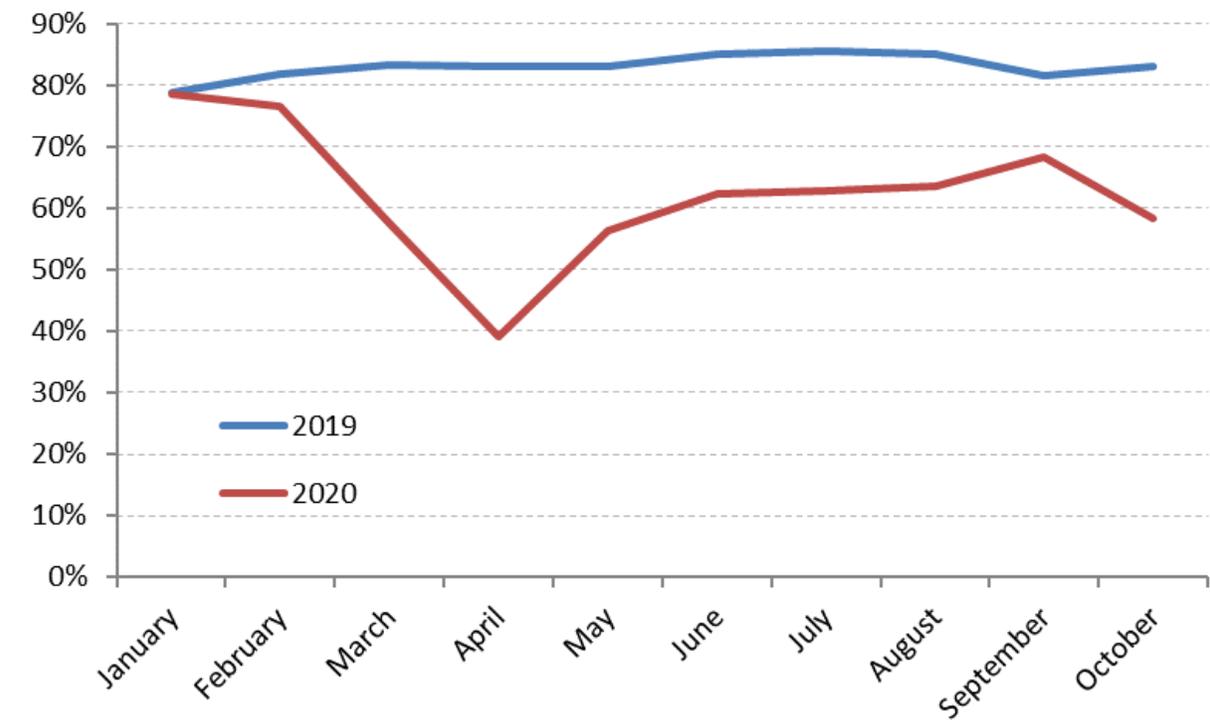
# Steep fall in passenger load factor

## Load factor dropped to all-time low

International load factor 2020 vs. 2019

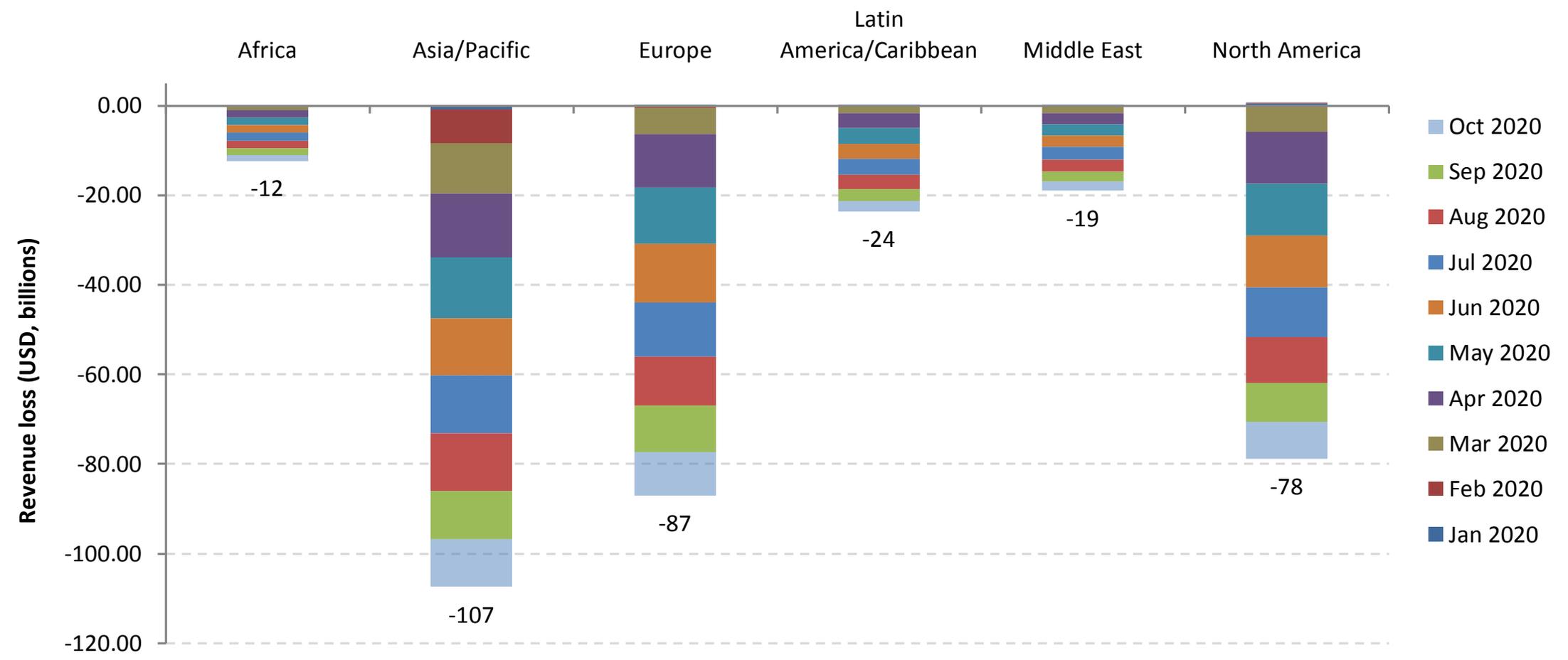


Domestic load factor 2020 vs. 2019





# Approximately USD 327 billion passenger revenue loss from Jan to Oct 2020

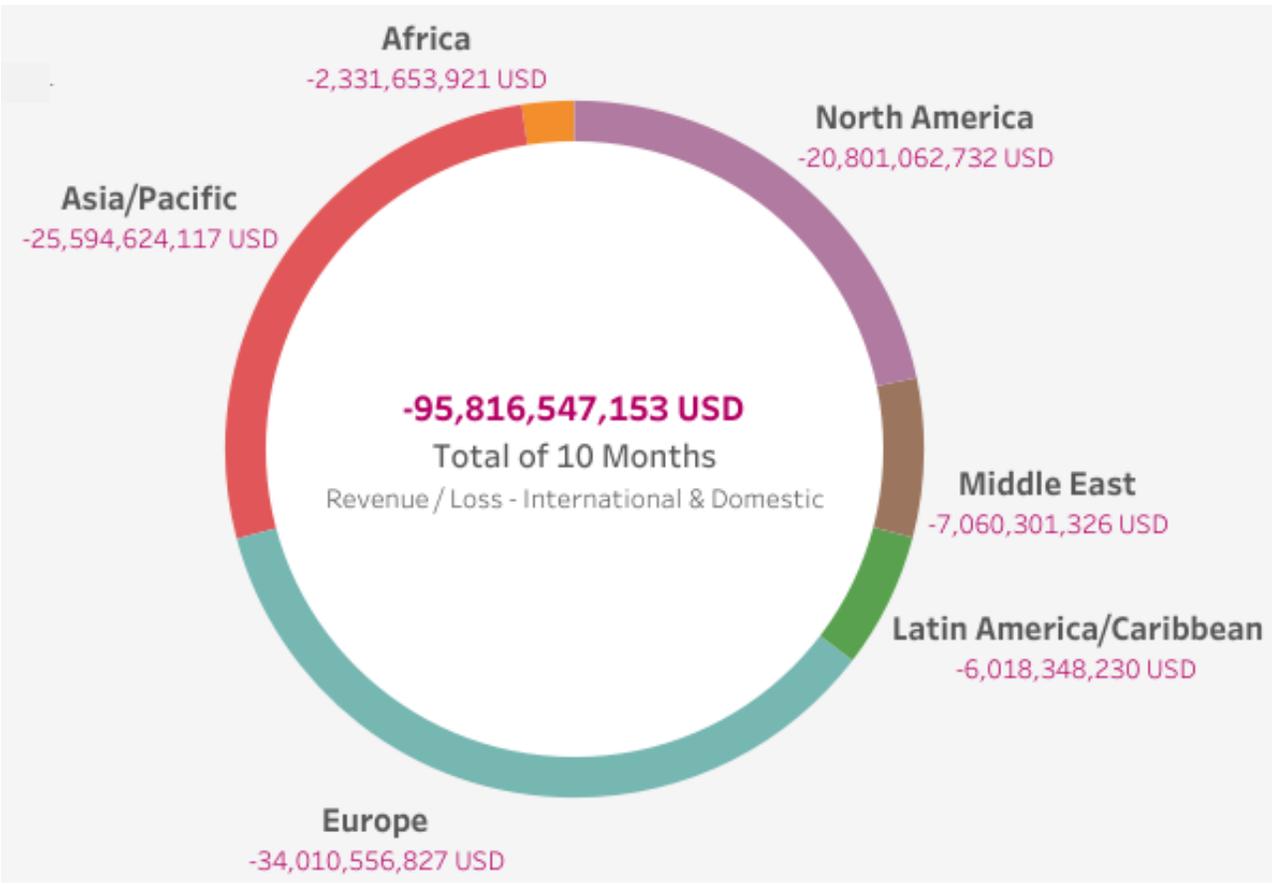


Note: Compared to Baseline (business as usual, originally-planned)

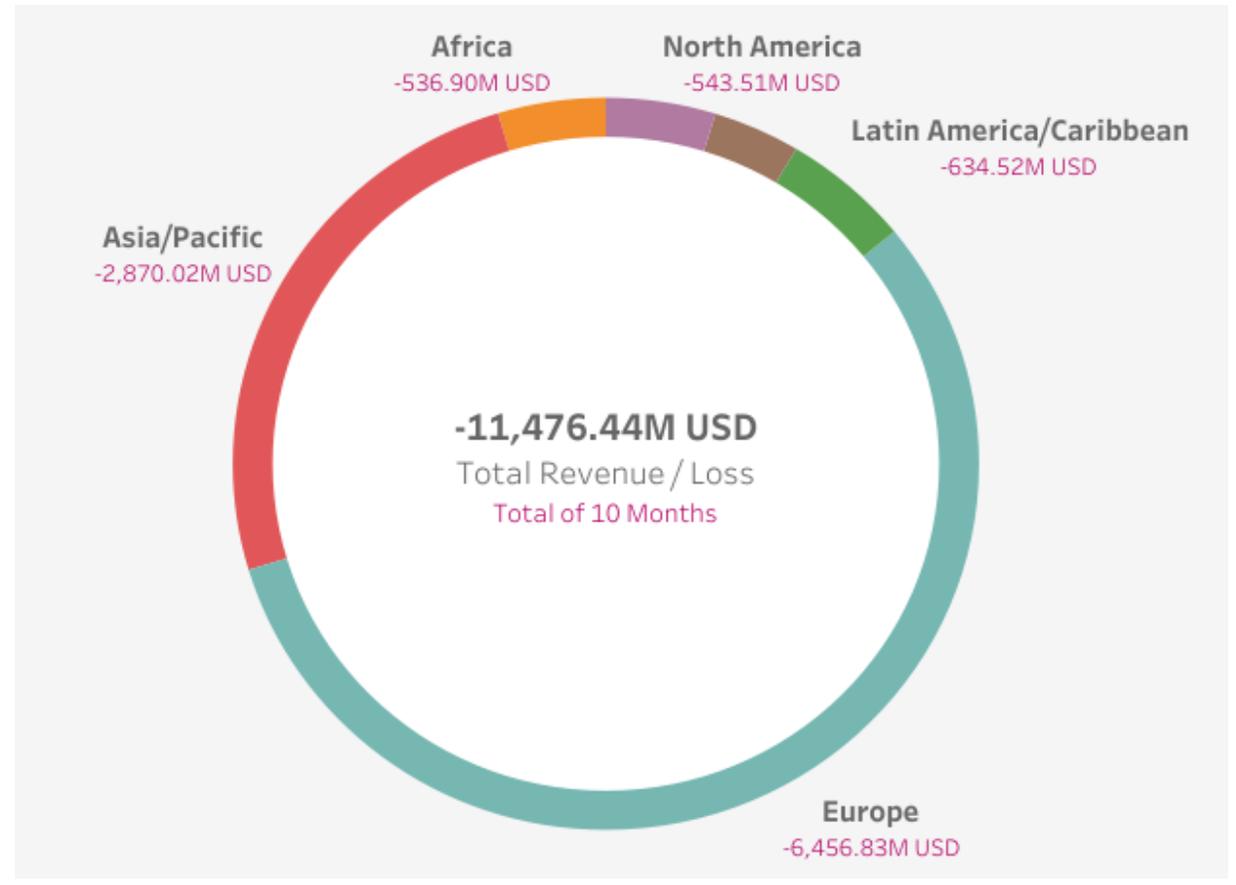


# Airport and ANSP revenues were also severely impacted

## Airport revenue loss



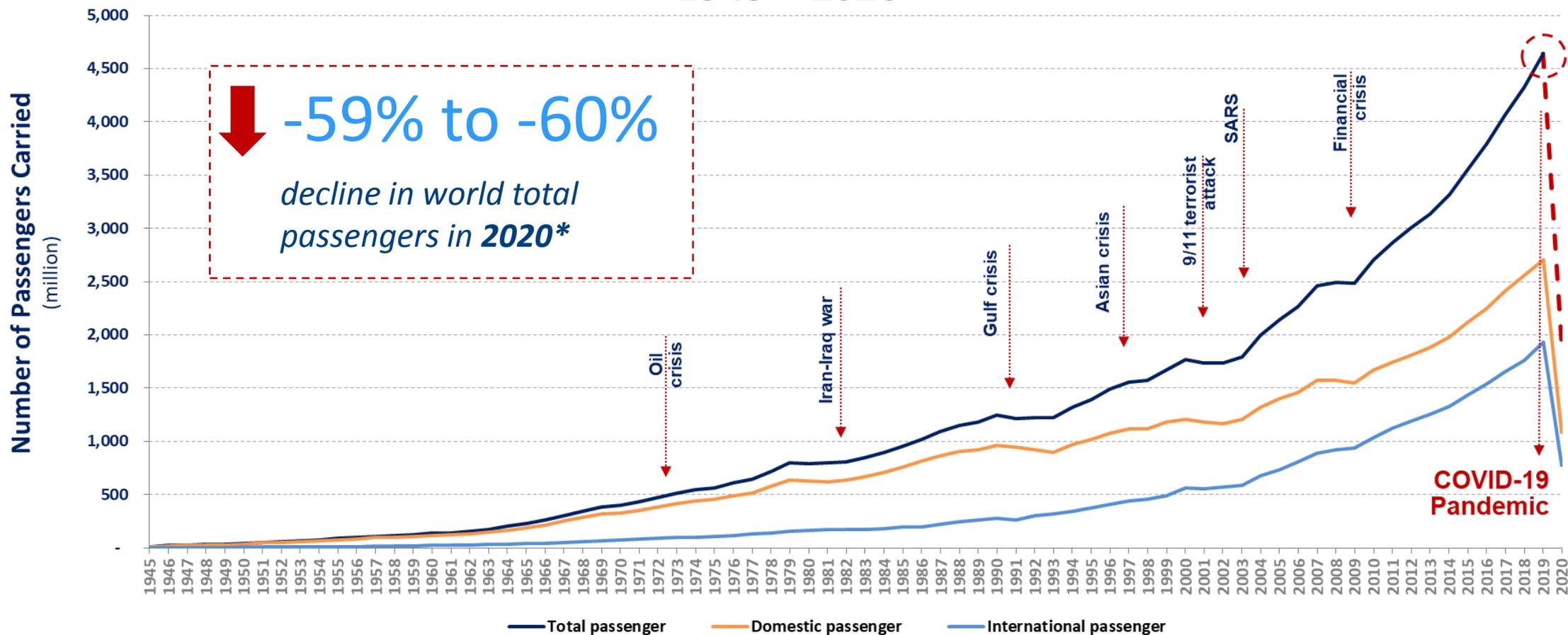
## ANSP revenue loss





# World passenger traffic collapses with unprecedented decline in history

## World passenger traffic evolution 1945 – 2020\*





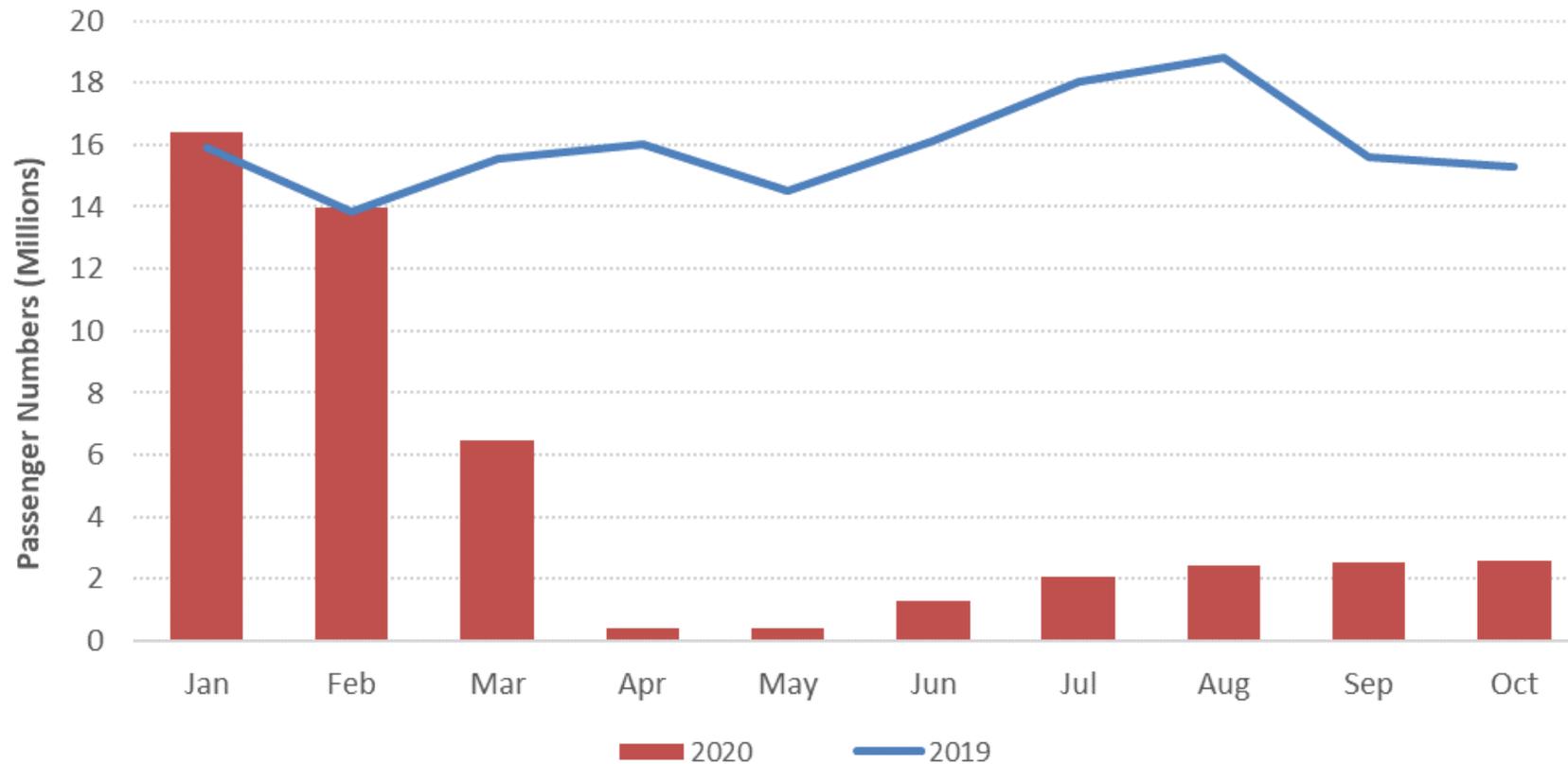
# Pandemic Year 2020 Impact on Middle East Region





# Significant decline in passenger numbers with marginal improvements

## Evolution of Passenger Numbers January to October

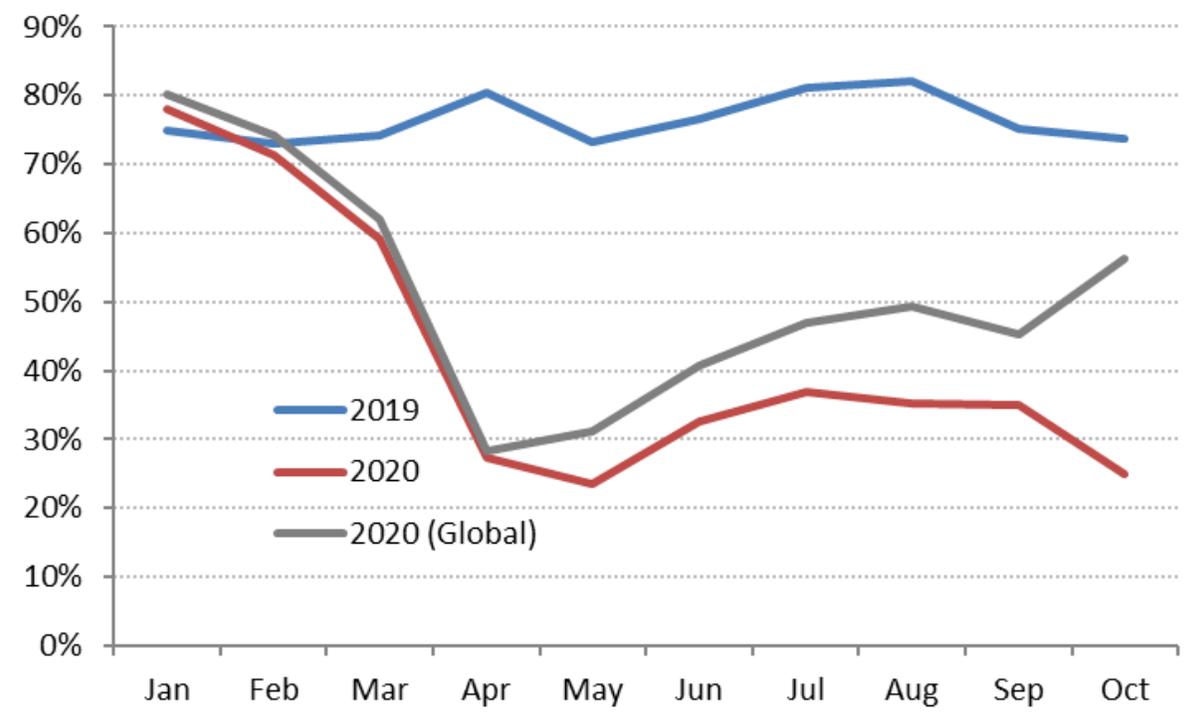




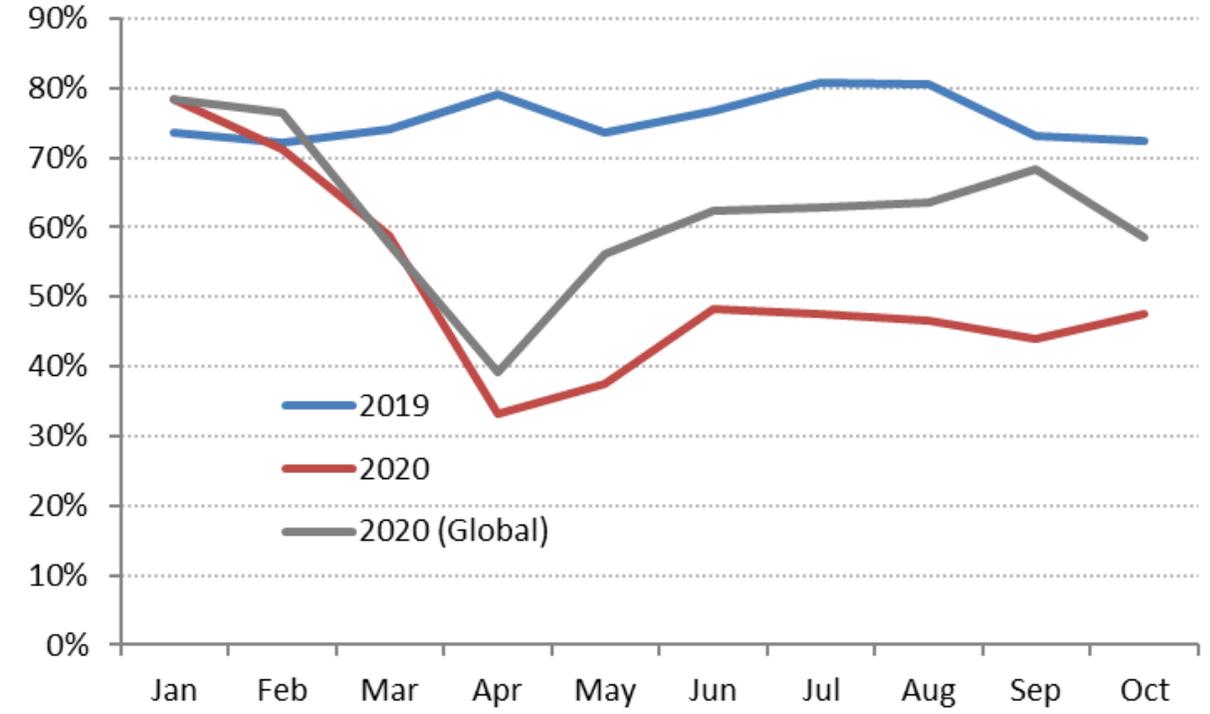
# Passenger load factors below industry average

## Load factor fell below industry average level

International load factor 2020 vs. 2019



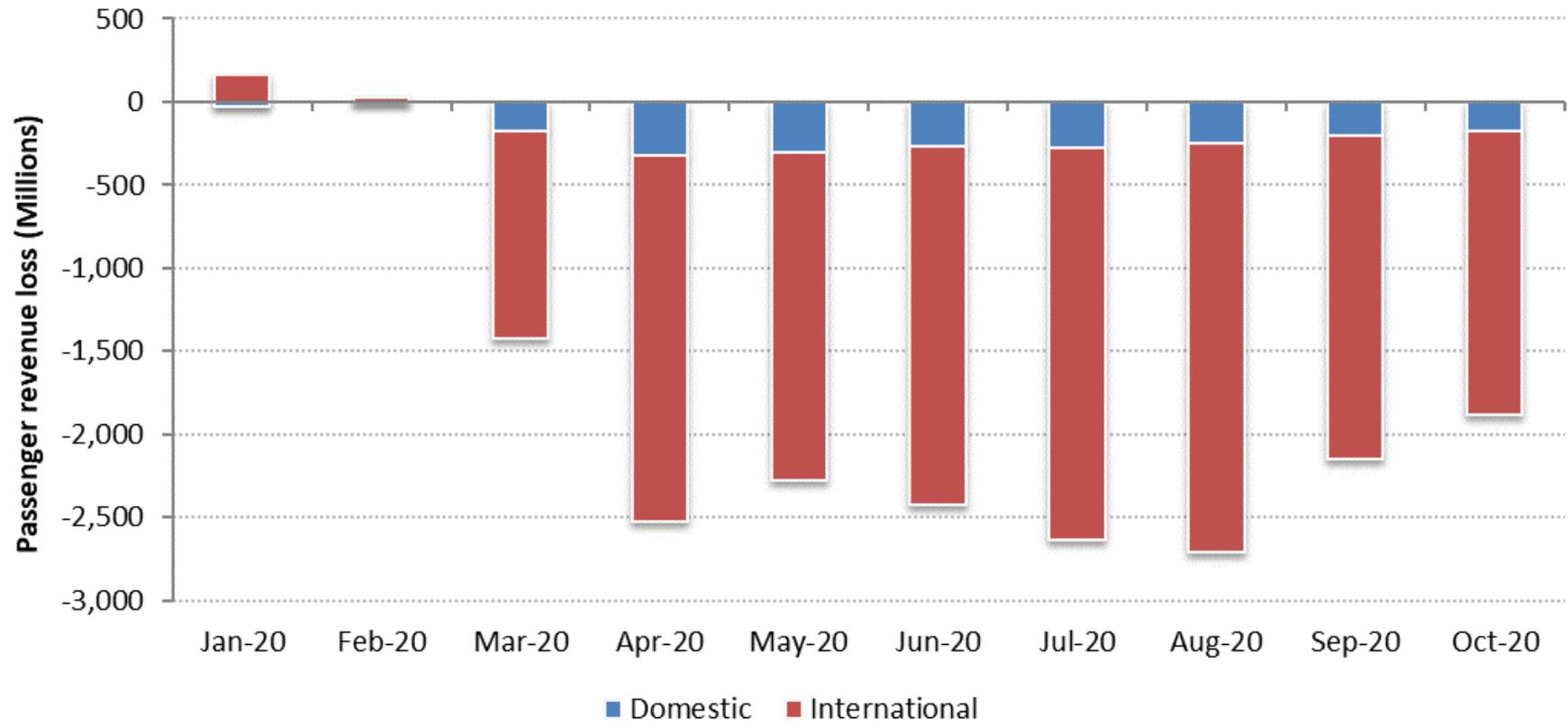
Domestic load factor 2020 vs. 2019





# Passenger revenue loss by month Middle East

Over USD 2 billion loss per month in airline passenger revenues since April



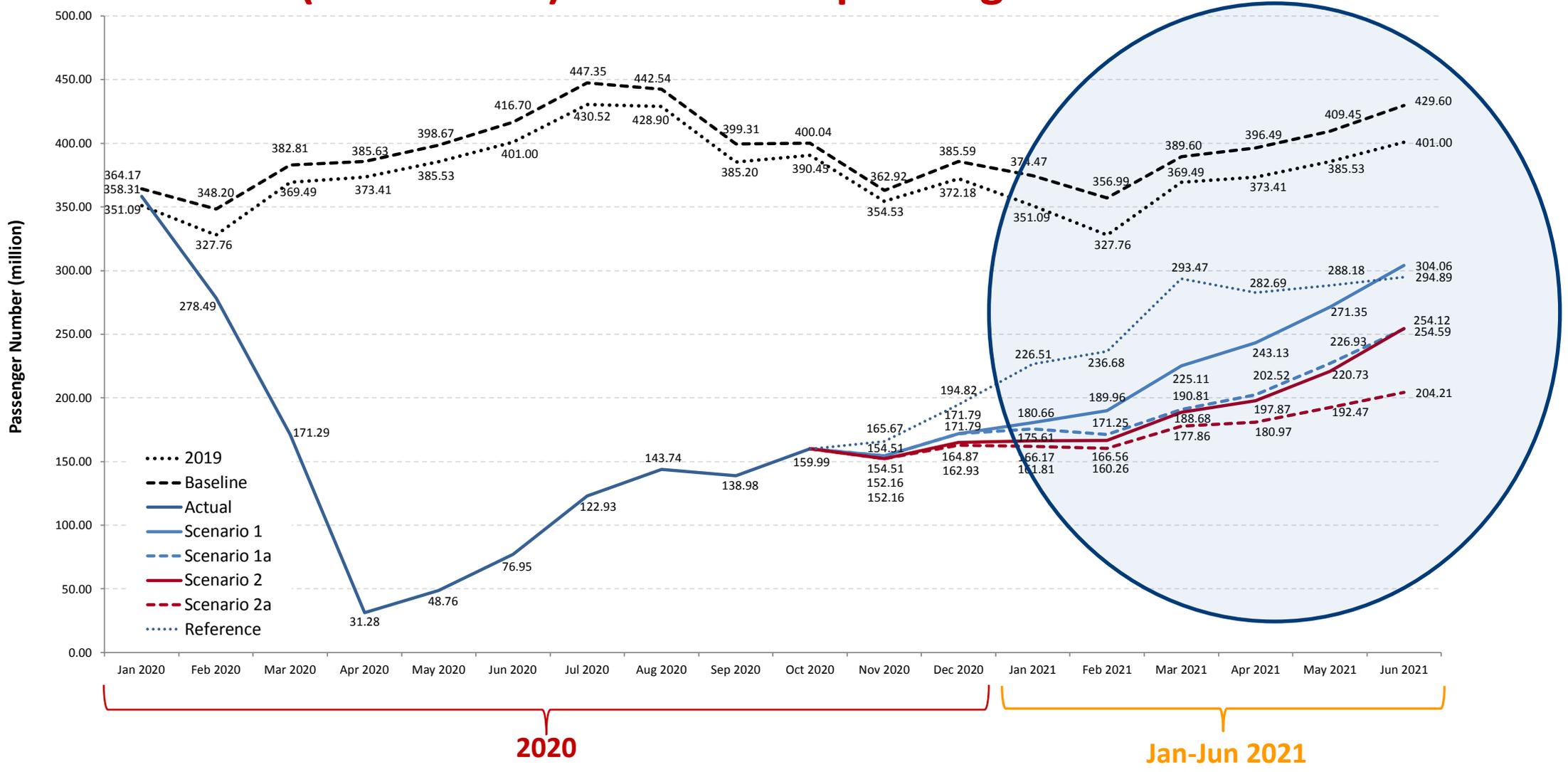


# Near-term Outlook and Forecasts



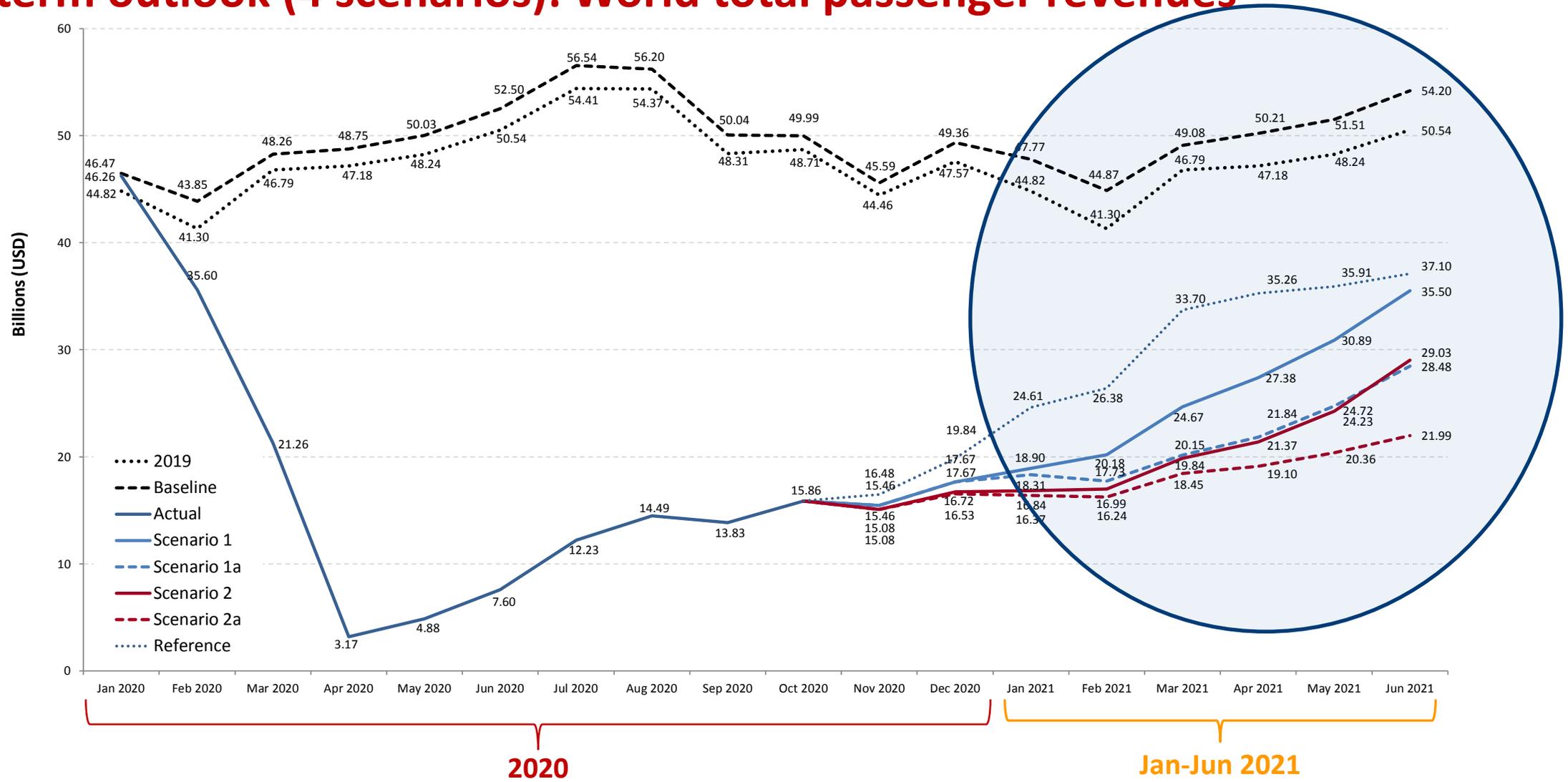


## Near-term outlook (4 scenarios): World total passenger traffic





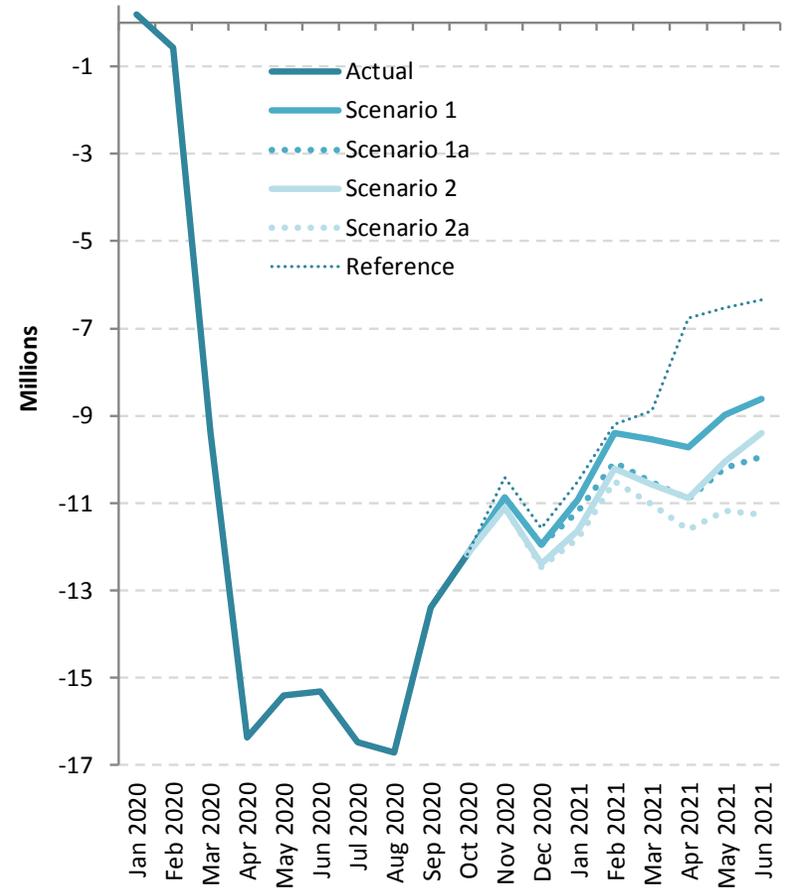
# Near-term outlook (4 scenarios): World total passenger revenues



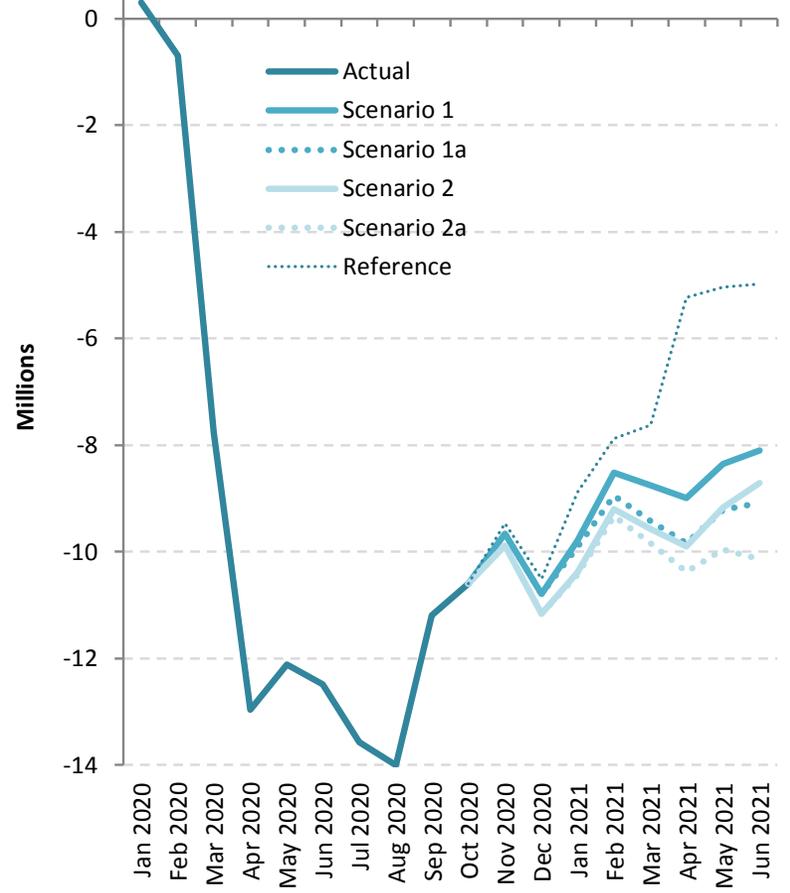


# Passenger number change compared to Baseline

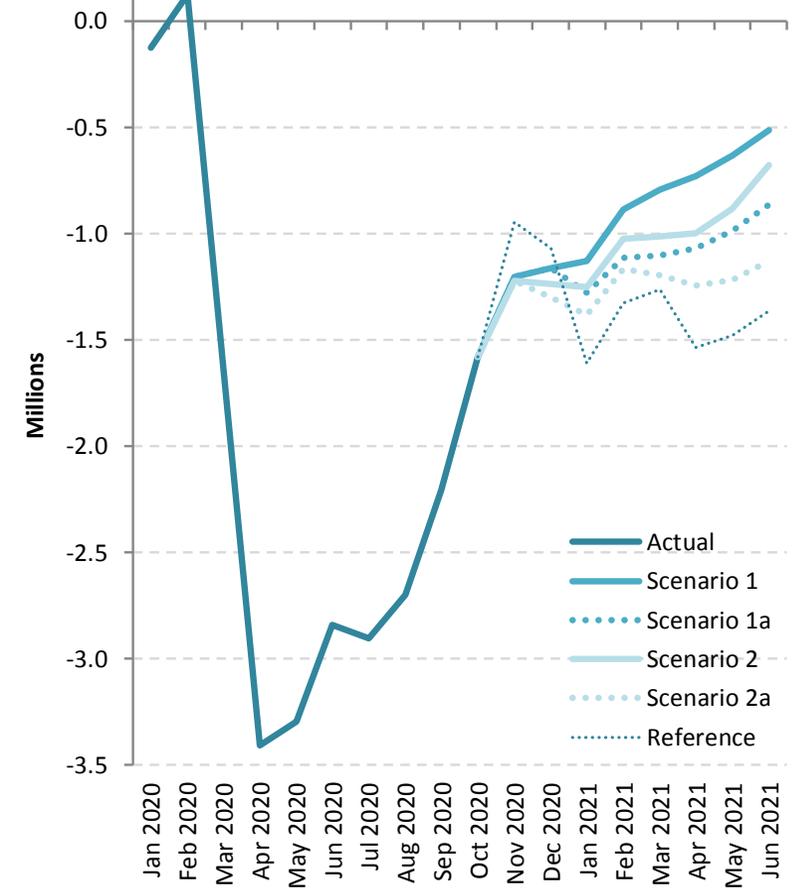
Middle East (Total)



Middle East (International)

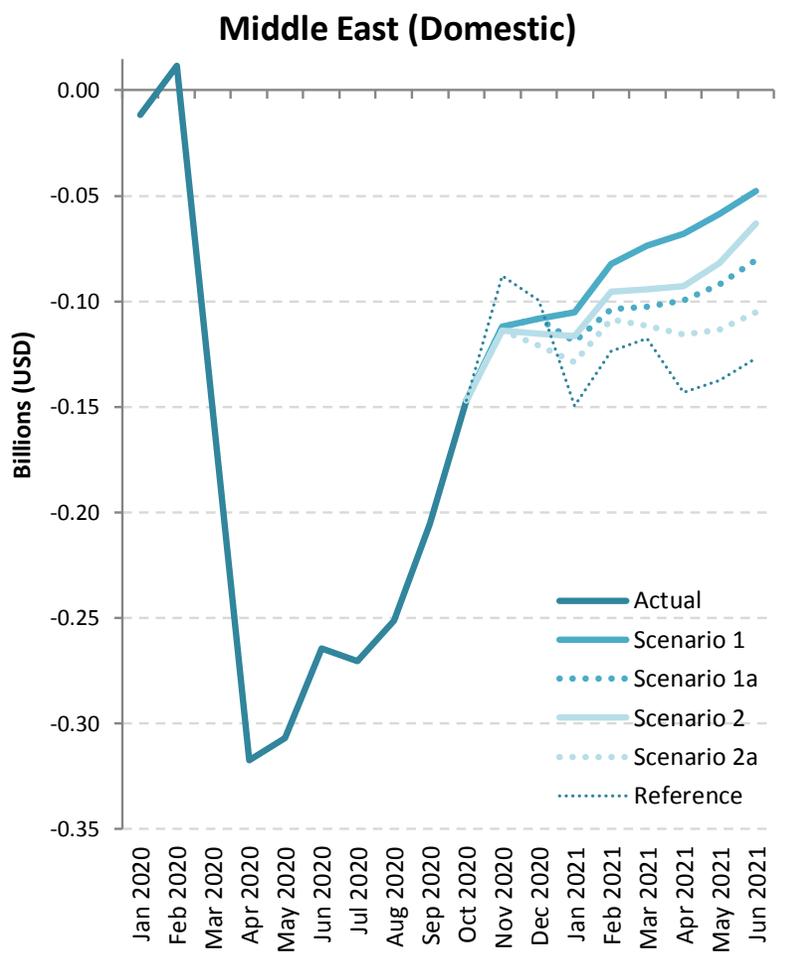
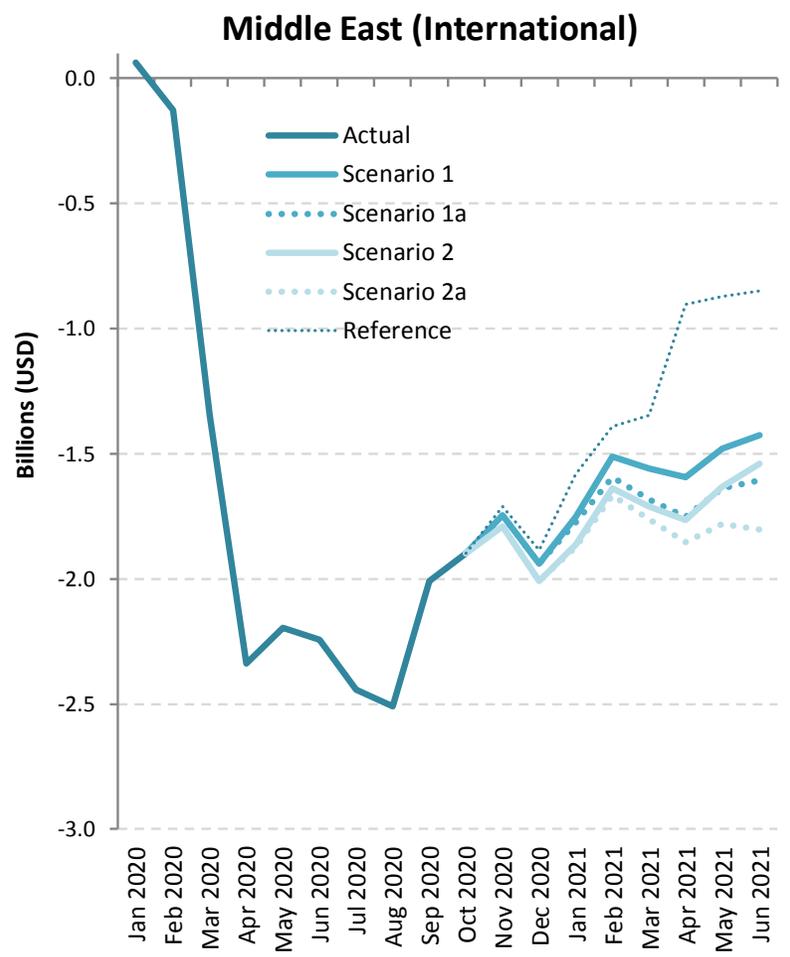
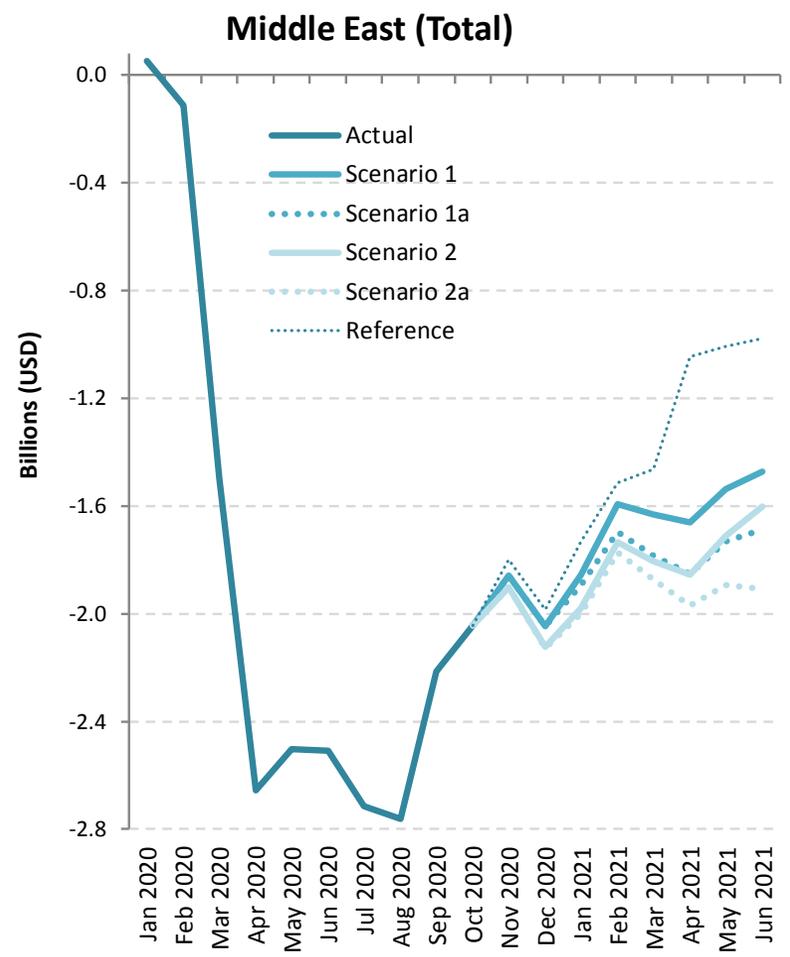


Middle East (Domestic)





# Passenger revenue change compared to Baseline





# How to Support the Industry?





## Council Aviation Recovery Task Force (CART) Recommendation on Economic and Financial Measures

*CART Recommendation 10 - Member States should consider appropriate extraordinary emergency measures to support financial viability and to maintain an adequate level of safe, secure and efficient operations, which should be inclusive, targeted, proportionate, transparent, temporary and consistent with ICAO's policies, while striking an appropriate balance among the respective interests without prejudice to fair competition and compromising safety, security and environmental performance.*





# Economic and Financial Measures

## Form of economic and financial measures

Various forms of economic and financial measures can be considered by States and industry to mitigate the impact of the pandemic on aviation.

State financial and regulatory support

Industry financial and operational measures





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# Global developments related to COVID-19

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Director, Air Transport Bureau, ICAO



# CART

COUNCIL AVIATION RECOVERY TASK FORCE

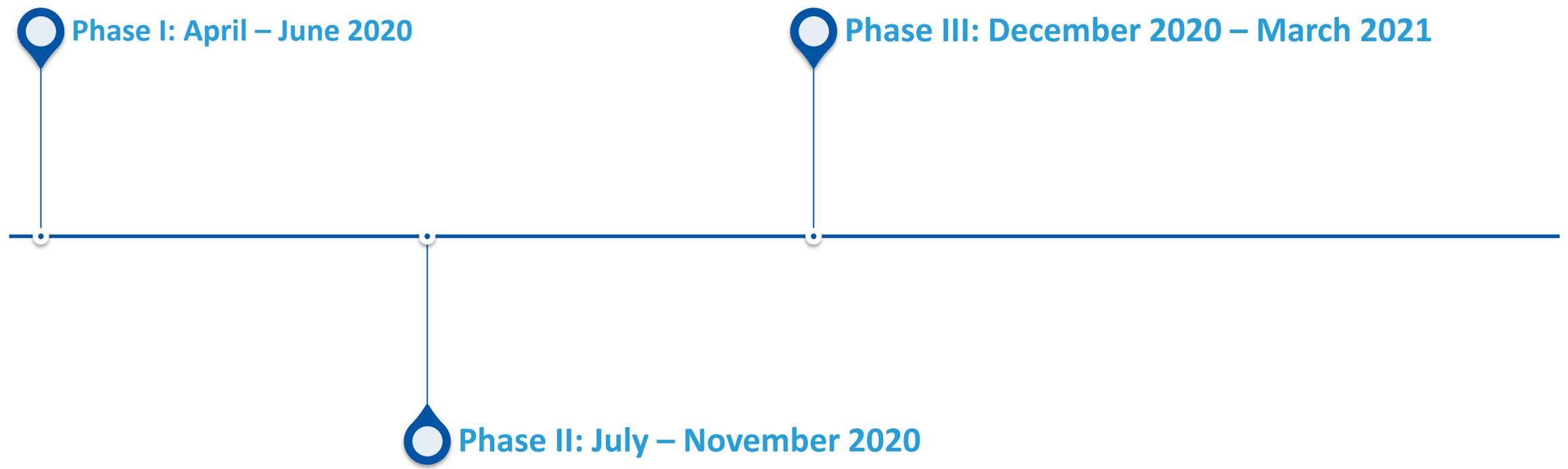
# REPORT



## ICAO Council's Aviation Recovery Task Force (CART)



# Phases of CART





- **Building on the process and success of CART Phase I**
  - CART Report (10 key principles and 11 recommendations)
  - Take-off: Guidance for Air Travel through the COVID-19 Public Health Crisis (TOGD)
- **Specific mandates of CART Phase II**
  - Review and draft amendment proposals to the TOGD associated with the Commercial Air Transport (CAT) journey
  - Review public health measures guidance material for activities associated with the CAT passenger journey not covered by TOGD, and other public health matters
  - Draft a high-level cover document on the outcomes and findings of CART



**HIGH-LEVEL  
COVER  
DOCUMENT**



**TAKE-OFF  
GUIDANCE DOCUMENT  
2<sup>nd</sup> Edition**



***Testing and Cross-border  
Risk Management  
Measures Manual (Doc  
10152)***



- *CART Report Phase I (published in June 2020) introduced a set of 11 recommendations for States to follow on their path to restart and recovery of aviation*
- **The HLCD introduces 3 complementing recommendations:**

**Recommendation 12 – Aviation safety-related measures**

**Recommendation 13 - Testing and cross border risk management measures**

**Recommendation 14 - Public Health Corridors (PHCs)**



# Implementation activities



## Roadmap to OPS Normal

- Sunset date for CCRD 31-Mar-2021
- Extension of alleviations discouraged
- Focus on return to normal operations
  - Pilot proficiency
  - PHC for training in another State
  - Medical certification
- Official launch of new website before year end





## Manual Testing and cross border risk management measures

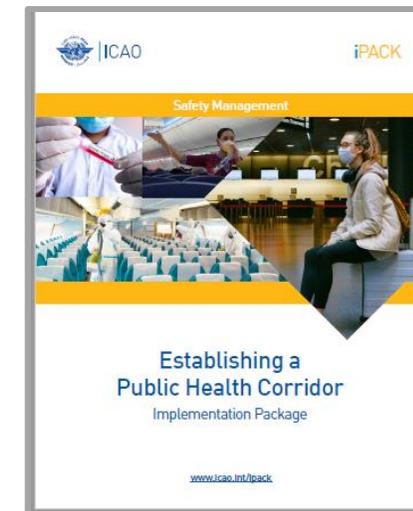
- CART Recommendation 13: While testing is not universally recommended by public health authorities as a routine health screening method, States contemplating testing in their COVID-19 risk management strategy should apply the approach outlined in the *ICAO Manual on Testing and Cross Border Risk Management Measures*.
- Recognizing the sovereignty of States, taking into account national frameworks and public health capacities
- Manual includes Risk Management Framework with a decision-making tool to determine the risk of transporting potentially infectious passengers and/or importing COVID-19 and factors States could consider should they elect to implement testing, as well as guidance on how to implement testing.
- First edition published November following WHO review
- Living document with regular updates as technology advances and evidence evolves
- Implementation through PHC





## Public Health Corridors (PHCs)

- Recommendation 14: States considering the formation of a PHC should actively share information with each other to implement PHCs in a harmonized manner. To facilitate implementation of PHCs, the ICAO Implementation Package (iPack) on establishing a PHC is available to States.
- A PHC opens one or more routes between cities, regions and States
- Necessitates sharing of information, mutual recognition of public health mitigation measures and bilateral/ multilateral discussions between States
- Implementation of PHCs facilitated through the ICAO Implementation Package (iPack) on establishing a PHC
- IPack includes ICAO and CAPSCA partner guidance material, various tools (checklists, templates etc.), online reporting systems and training courses and Subject Matter Experts (SME) supporting CAAs remotely
- PHC App currently being developed



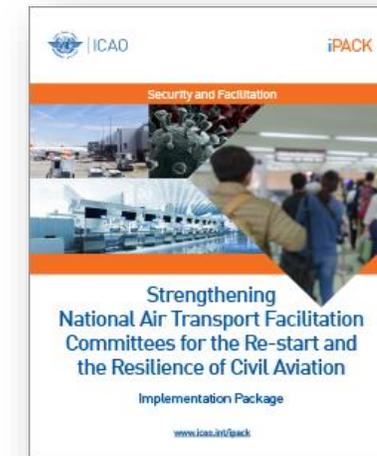


## Self-contained package of standardized implementation support, including:

- Guidance material
- Training
- Tools
- Expert support
- Procurement support (when applicable)

## iPacks available in the following areas:

- Facilitation
- Aerodrome Restart
- Safety Risk Management
- Public Health Corridor





## Aviation Security iPack

- The iPack: *Strengthen Aviation Security during the COVID-19 Pandemic*

## Guidance Material

- First Edition of the “Guidelines for Aviation Security Contingency Measures during the COVID-19 Pandemic”.
- The new Edition of the Security Manual (Doc. 8973/12-Restricted)

## 2021 Year of Security Culture (YOSC)



## Facilitation iPack

- The FAL iPack: “ Strengthening National Air Transport Facilitation Committees for the Restart and the Resilience of Civil Aviation” is expected to be deployed between 4Q 2020 to 1Q 2021

## Task Force on Health Issues Outbreaks in Aviation

- **Initial step:** Preparation of a Gap analysis report to be presented to the Air Transport Committee in January 2021.
- **Next steps:** proposals for new and revised health-related SARPs to be submitted to the Facilitation Panel for consultation (Apr 2021)

## Health and Vaccine Certificates

- WHO is developing a digital platform for the COVID-19 vaccine certificate
- The authentication and security of the certificate will be worked in close coordination with ICAO

## Multi-stakeholder collaboration

- ICAO continues to facilitate on a regular basis multi-stakeholder collaboration and coordination on the various on-going matters related to the impact of COVID-19 on air transport operations.



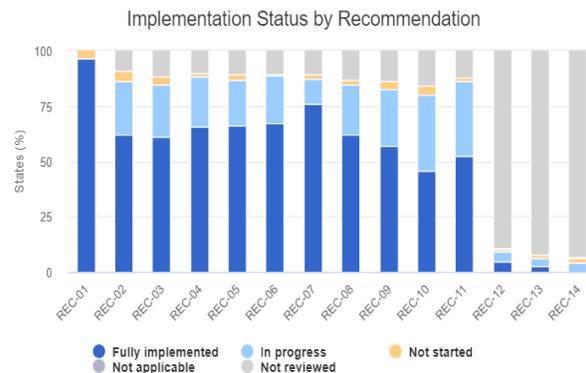
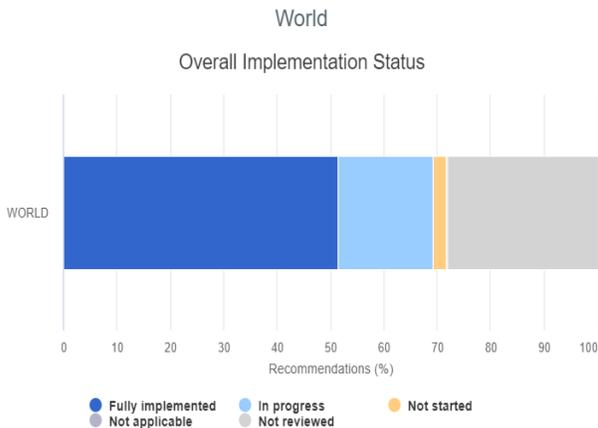
- Recent air cargo deliverables include:
  - *Annex 6, Part I – Amendment 44*
  - *Guidance for Safe Operations Involving Aeroplane Cargo Compartments (Doc 10102)*
  - *Guidance on a Competency-based Approach to Dangerous Goods Training and Assessment (Doc 10147)*
  - ICAO-TIACA Safe Supply Chain course (the kick-off is 8 Dec and timed for Bangkok/ICT at 13h GMT+7)
- Air Cargo iPACK and regional webinars on digitalization
- The ICAO Secretariat is developing an action plan for COVAX distribution that will address multidisciplinary challenges:
  - Safety (e.g., vaccine classification, cargo compartment safety)
  - Security
  - Facilitation (e.g., ensure effective coordination between CAAs, health authorities, industry for fast customs clearance)
  - Economic sustainability (e.g., electronic business solutions reducing physical contact along supply chain, digitalization)
- Addressing multimodal supply chain challenges



# COVID-19 Response and Recovery Implementation Centre (CRRIC)

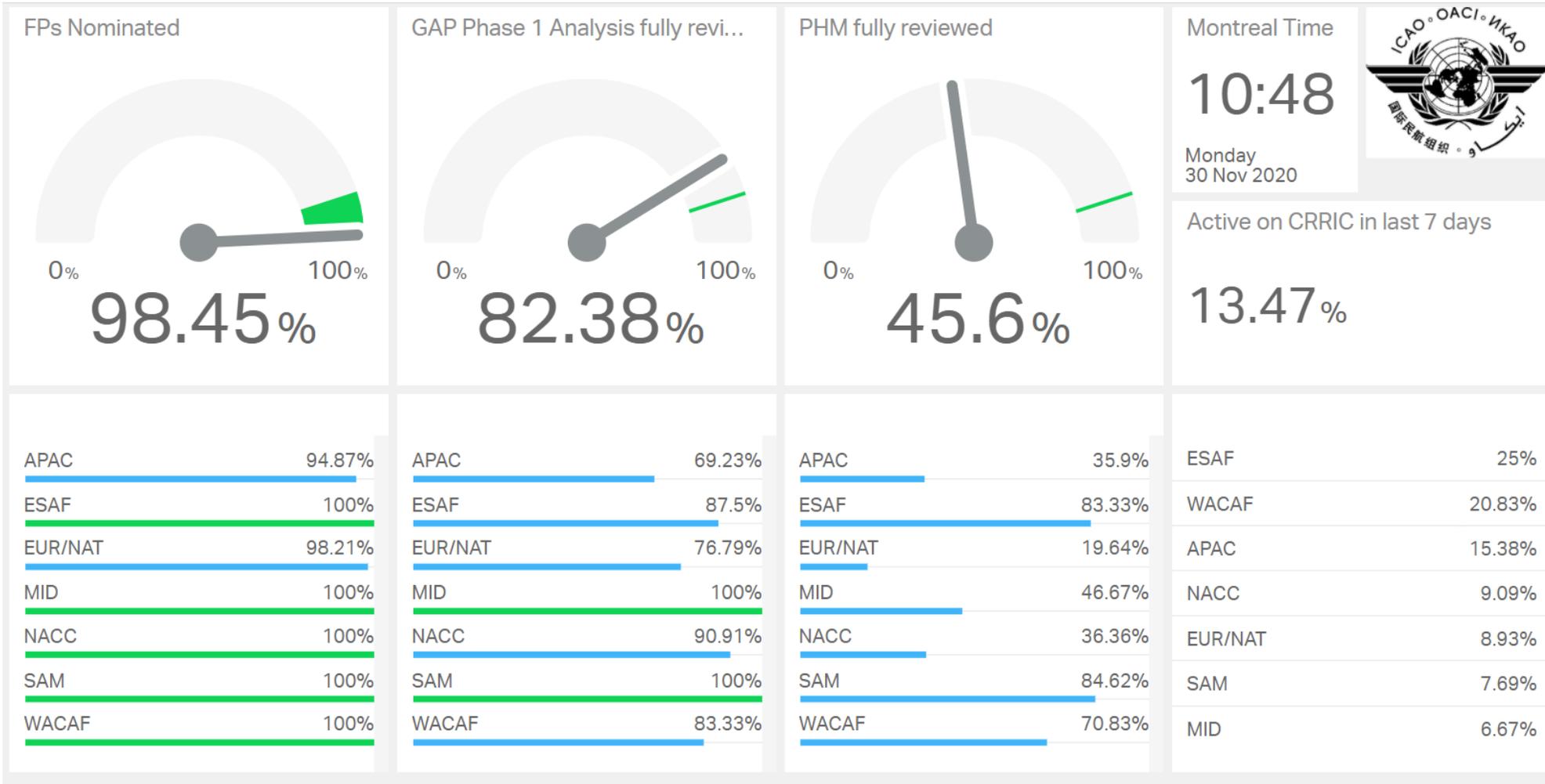


- States can report on implementation of:
  - CART Recommendations
  - Take Off Guidance Document
- Provides State, Regional and Global Dashboards





# CRRIC Activity Status Dashboard





# Resource Mobilization

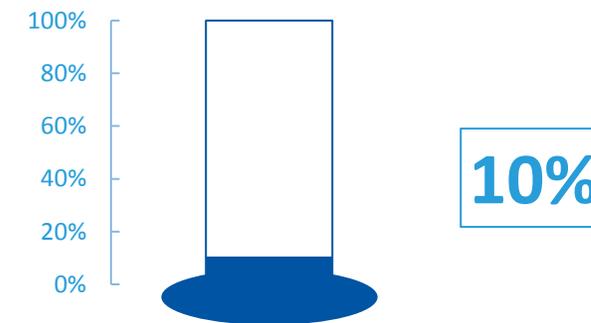
## Global RM ICAO ask

Global ICAO ask via  
State Letter issued on  
12/Aug/2020

**USD 7,500,000**

## RM Results

**TOTAL  
Received – Pledges - Pipeline**



**Donor funds – USD \$785,100**



# Discussion



# Economic and Operational Impact of COVID-19 on the Air Transport System

## Global developments related to COVID-19





# Group Photo

ICAO MID

Participants in the virtual meeting grid include:

- Ahmad Amireh, Mohamed Rah..., Mohamed Smaoui, Council Rep. Eg..., hatem oueslati, Abdennebi Ma..., Fang Liu, Was'hor Ablovi, Hussain Alvarri, Saif Alsuwaidi
- SL Wong, Manal Wissa, sameh fawzy, Council Rep. Su..., Mohamed Iheb..., Sonia El Sakka, Saeed Bawazir, Abdulaziz Alda, Ahmad Amireh, Council Rep. KSA
- radhouan aissa, Council Rep. Su..., Ignacio Iglesias, Boushra Youssef, Nadim Salim, mohamed alkaa, Souhaib CALLEL, Rob Erskine, Abdul Wahab T., Ibrahim Adlan SCAA
- Muhammad Al..., Ahmed Al Jalfat, Walid Elhoss, Mekki La-lou, Mohammed Naz..., Abdulrahman A..., Mohammed Na..., sameh fawzy, Mohammad Hu..., Halimati Misto
- mohamed Rejeb, Dina El Karimy, Fateh Bekhti, iadiri, Guillermo IOVI..., Stephen P. Crea..., Mohamed Chak..., Ismael Moham..., Hussain Alvarri, Hoda Gabriel
- Nasser Al Jassasi, Muna - ICAO M..., manal fares, Guillermo IOVI..., pham med. Na..., Sue Kods...

**DGCA-MID Virtual Meeting 18 June**