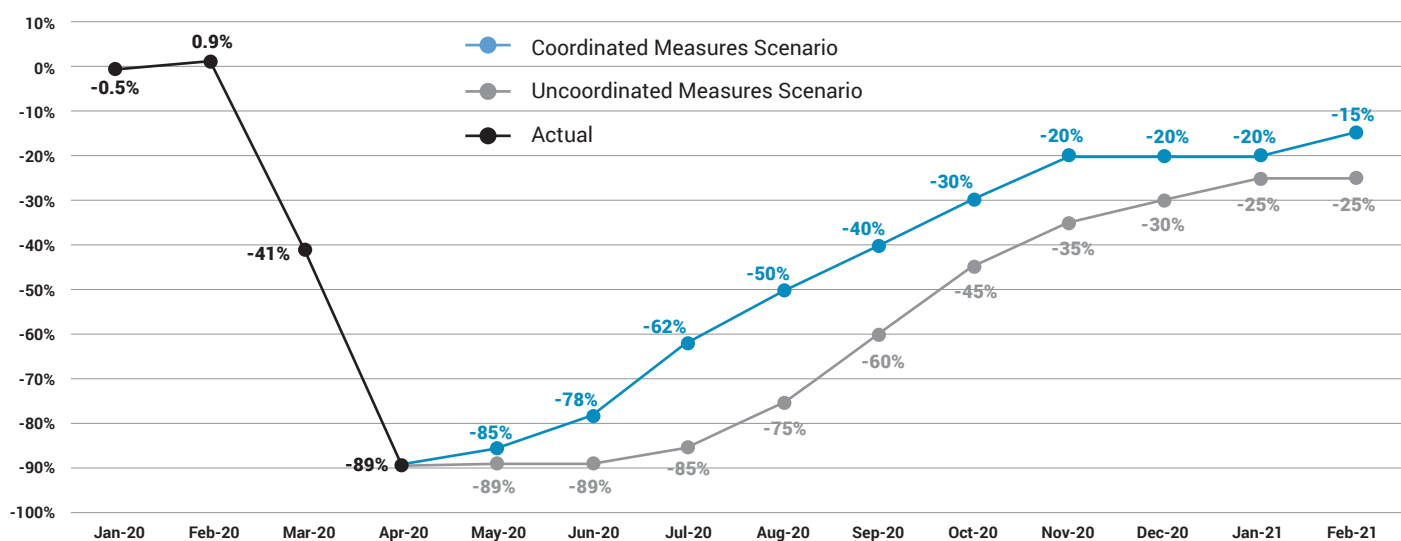


Aviation recovery – Importance of a coordinated approach

Brussels 27 April 2020

EUROCONTROL has produced two scenarios to illustrate the possible impact of the extent to which “COVID-compliant operational procedures” for airlines and airports are common across all European States. If airlines have to comply with one set of regulations on departure and another set when the flight arrives in another state, then this will be particularly onerous on the industry.

EUROCONTROL Draft Traffic Scenarios - 24 April 2020 (base year 2019)



These scenarios are not a forecast – they are very much dependent on variables, such as the duration and size of the pandemic across Europe, that are not clear. Rather they illustrate how **an uncoordinated approach will significantly impede the rate of a recovery**. A coordinated approach foresees a broad implementation in mid-June, picking up in July. If this is delayed then the forecast simply moves June to July and rolls on.

The analysis takes into account the views of many other leading entities, including ICAO, IATA, ACI and the IMF as well as direct contacts with the CEOs of major European airlines.

We have assumed that intra-European traffic will return first, based on the experience in China (where about 40% of domestic flights are now being operated, albeit at very low load factors) and the practicalities involved. Thus the initial months of the two scenarios are based solely on an increase in intra-European traffic.

The ‘Coordinated Measures’ Scenario is based on there being a common approach to putting in place operational procedures and lifting national restrictions. This is a major requirement of both airlines and airports to support their recovery.

The ‘Uncoordinated Measures’ Scenario assumes that this common approach does not materialise.

Overall, the **Coordinated Measures Scenario** envisages a loss of **45% of flights (5 million)** in 2020, while the **Uncoordinated Measures Scenario** would result in the loss of **57% of flights (6.2 million)**.

The difference between the two scenarios is significant and highlights that the development of a common approach is vital in order to minimise the disruption and the cost of the pandemic.

Total financial loss: Taking all of the above into account, there will be a total industry **loss in revenues of approximately €110 billion during 2020 for airlines, airports and ANSPs.**