

## **Air Transport in the Post-Covid Era**

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The Covid-19 pandemic could be the greatest challenge the global aviation industry will ever face. The effects are being felt throughout the ecosystem, including airlines, airports and air navigation bodies.

Recent estimates by the International Civil Aviation Organization indicate that the 2020-21 air traffic recession will take one of the following shapes:

- V-shaped: the normal shape for a recession; a brief period of sharp economic decline followed by a quick/smooth recovery.
- U-shaped: prolonged contraction and muted recovery to trend line growth.
- L-shaped (depression): long-term downturn in economic activity; a steep drop followed by a flat line with the possibility of not returning to trend line growth.
- W-shaped: a double-dip recession consisting of a “down-up-down-up” pattern before full recovery.
- Nike-swoosh-shaped: a sharp rebound that quickly flattens.

With the overall severity and duration of the Covid-19 pandemic still uncertain, four different recovery paths under two indicative scenarios have been developed:

- Baseline: counterfactual scenario in which the Covid-19 pandemic never happened, i.e. as originally planned or business as usual.
- Scenario 1: two different paths (similar to Nike-swoosh- and W-shaped).
  - International
    - Path 1: Smooth capacity recovery through rebound of pent-up demand, but at a diminishing rate of growth.
    - Path 1a: Smooth capacity recovery at first, followed by a downturn due to over-capacity.
  - Domestic
    - Path 1: Swift capacity rebound pushed by pent-up demand but at a diminishing rate of growth.
    - Path 1a: Smooth capacity recovery at first, followed by a downturn due to over-capacity.

- Scenario 2: two different paths (similar to U- and L-shaped).
  - International
    - Path 2: Return to trend growth accelerates after slow progress of capacity recovery.
    - Path 2a: Capacity recovery at a decreasing speed due to respite and continuous demand slump.
  - Domestic
    - Path 2: Gradual capacity recovery followed by accelerated growth.
    - Path 2a: Capacity recovery at a decreasing speed due to sluggish demand growth.

On this basis, the International Civil Aviation Organization published the provisional results for 2020 compared to 2019, which show a **49.5%** reduction in seating capacity and a reduction of **2.69 billion** passengers worldwide (i.e. a 60% reduction). Moreover, air carriers recorded losses of **369.7 billion USD**.

According to the organization, this downward trend is set to continue throughout the first half of 2021, compared to 2019 levels, with at least a **42.1%** reduction in seats offered by airlines, **1.1 billion fewer passengers** (i.e. a 50% reduction) and revenue losses of up to **156 billion USD** for airlines.

Tunisia has not been spared the effects of this situation; air traffic to and from Tunisian airports has been hit hard, with a substantial **drop** in 2020 (compared to the same period in 2019) of **75.5%** for passenger traffic, **64.8%** for aircraft movement and **14.4%** for cargo tonnage.

This decline is a natural consequence of the suspension of commercial passenger traffic to and from Tunisian airports from mid-March until 27 June 2020. During this period, traffic was limited to repatriations, medical and humanitarian operations and cargo.

Commercial traffic in Tunisia resumed on 27 June 2020. The process was carried out cautiously, gradually and, most importantly, in accordance with a health protocol that was developed by the Ministry of Transport and Logistics, in coordination with the Ministry of Health, and that took account of guidelines issued by the International Civil Aviation Organization (ICAO) and the World Health Organization (WHO) and the recommendations of the European Union Aviation Safety Agency (EASA), the International Air Transport Association (IATA) and Airports Council International (ACI).

This protocol outlines a series of requirements and recommendations for airport operators, aircraft operators and other relevant stakeholders and stipulates that they must coordinate their actions with the health authorities and local airport facilitation committees with a view to

achieving effective risk mitigation and ensuring compliance with national public health requirements.

Currently, people who want to visit Tunisia by plane must be in possession of a certificate that shows a negative RT-PCR test result and then undergo a 14-day quarantine period, although there are some exceptions.

Nevertheless, even with this health protocol and all the precautionary measures required of passengers, airlines and airports, demand for air transport cannot increase and keep growing unless passenger confidence is restored.

It is therefore essential to reassure passengers who are worried about catching the virus during air travel and convince them that the risk of being infected at the airport or on board the plane is minimal.

In fact, airports are actually clean, safe places; all passengers must wear a mask at check-in, while boarding, during the flight and when disembarking. Physical distancing of at least 1 metre at check-in desks and while boarding is mandatory. Temperature screening is also mandatory before entering the terminal, and body temperature is checked again prior to boarding. Disinfection and cleaning are carried out continuously and hydroalcoholic gel dispensers are available everywhere.

Moreover, planes are very safe places with respect to Covid-19 transmission, given that mask wearing is compulsory, the cabin air is renewed every two to three minutes and the cabin is equipped with HEPA particle filters, which absorb 99.9% of particles and are identical to those used in operating theatres. This renewal ensures that the air on board is healthy.

Insurance and precautionary measures could be considered once a vaccine is available. These could include making it compulsory for passengers to have the Covid-19 vaccine before boarding and setting up a health passport (international vaccination record).

Several international organizations are currently working on this. The International Civil Aviation Organization published the second edition of its “Take-off” guidelines on 17 November 2020: Guidance for Air Travel Through the COVID-19 Public Health Crisis (CART II), which includes additional recommendations and guidance in light of new developments relating to the Covid-19 crisis and supplements the recommendations included in CART I, published in June 2020.

All countries now face a new challenge and must implement a post-Covid air transport recovery plan based on innovation, digitization and the use of technologies such as digital credentials and artificial intelligence, which must play a key role in the restart and recovery of air transport after the crisis and steer it onto the most sustainable path possible.

Countries must also share information, expertise and good practices based primarily on innovative procedures and technologies to restore passenger confidence in air transport.

The liberalization of air services, whether within Africa (SAATM) or with the European Union, must make allowances for the difficulties experienced by airlines following the Covid-19 crisis and should be based on fair competition to preserve the economic sustainability of airlines and avoid further eroding their results, which have already been negatively affected by the Covid-19 crisis.

In conclusion, the Covid-19 pandemic is not only a health crisis, but also an economic, social and humanitarian crisis. Given the dramatic global economic and social impact it has caused, the aviation system now stands on the verge of rapid transformation.

Admittedly, the light at the end of the tunnel is not yet visible, but this pandemic will one day come to an end and the world of air transport will put the most serious crisis in its history behind it.