

EUROPEAN CIVIL AVIATION IN 2021 IN TERMS OF A GLOBAL HEALTH CRISIS

In 2021 the European civil aviation system recorded a partial, but still evident and sustainable recovery of the traffic compared to 2020. However, the negative impact of the global health crisis with Covid-19, which began in early 2020, continued to be felt in the field of air transport with all its relentlessness throughout 2021. According to EUROCONTROL data published in their Think Paper # 15 from January 2022, the number of flights in the European skies in 2021, compared to 2019, was down 64% in January, ending with a drop of 22 % in December. In other words, the average daily number of flights in Europe in January was 9 241, and in December 20.028.

The mass vaccination of the population and the introduction of digital certificates for Covid-19 in the EU countries helped to a certain extent to ensure a relatively solid increase in the physical volume of traffic during the second half of 2021, and in the summer months 73% of the traffic from the same period of the "pre-COVID" 2019 were reached. However, on an annual basis, the total traffic in 2021 remained 44% lower than the traffic in 2019. Expressed in absolute numbers, in 2021, 6.2 million flights were realized, i.e. 4.9 million flights less than in 2019. This is a certain improvement compared to 2020, when about 5 million flights were realized, i.e. 6.1 million fewer flights compared to 2019. As a reminder, during 2019, which is taken as a benchmark in the preparation of traffic statistics analysis, reports and forecasts, a total of 11.1 million flights were realized in the European sky.

The increase in predictability, i.e. the reduction of uncertainty, as well as the continuous return of travel, helped the airlines and the airports in 2021 to remain somehow "alive", although the financial balance sheets of all entities in the aviation industry remained "in the red". The total financial losses of European airlines in 2021 amount to about 18.5 billion euros, with 1.45 billion fewer passengers transported compared to 2019. The aircraft loading ratio, which ranged around 50-60% for air carriers, had a strong impact on profitability, with the largest air carriers reducing the total number of flights by 30% -64% per year.

In the Macedonian sky in 2021 about 316,000 overflights were realized, which is a decrease of 36% compared to the number of overflights in 2019. This caused a reduction of the annual overflight revenues for the Macedonian aviation system by 23%. At the same time, at the two Macedonian airports in 2021 about 14 thousand take-offs and landings were realized, which is about 7 thousand operations, i.e. 32%, less compared to 2019.

In 2022 EUROCONTROL expects realization of about 9.3 million flights in the European sky, i.e. reaching 84% of the number of realized flights in 2019. This forecast is based on the analysis, scenarios and projections for the movement of the physical volume of traffic in the next five years, which EUROCONTROL announced in October 2021. Namely, EUROCONTROL has foreseen 3 scenarios.

The basic, or so-called real scenario, predicts reaching the level of air traffic from 2019 at the end of 2024. According to the optimistic scenario, which assumes intensive mass vaccination of people globally, rapid resumption of intercontinental flights and the abolition of all restrictions and protective anti-COVID in EU countries, the number of flights from 2019 could be reached in early 2023. The pessimistic scenario, in conditions of slow vaccination of the population and unilateral introduction of new and stricter protective anti-COVID measures or other restrictions in the use of airspace by EU countries, predicts reaching the

level of traffic from 2019 until the end of 2027. However, according to the traffic movements on the European continent in the first 3 months of 2022, the most probable scenario for achieving the physical volume of air traffic is the basic, or so-called real scenario. According to this scenario, in 2023, 10.5 million flights are expected in 2024, 11.1 million flights (as many as there were in 2019), in 2025, 11.3 million flights in 2026, 11.6 and in 2027, 11.8 million flights, 11.1 million flights (as many as there were in 2019) 11.3 million flights in 2025, 11.6 in 2026 and 11.8 million flights in 2027.

Although the partial recovery of air traffic in 2021 enabled the survival of most of the European airlines, airports, aircraft manufacturers, providers of airport or navigation services, and other entities in the aviation industry, this 2022 will be crucial for restoring profitability in the sector, as well as for achieving progress in sustainability. In 2021, there was an extensive international cooperation for the basic activities to be undertaken globally, in conditions of severe and unpredictable health crisis, but the desired progress is still lagging behind. It became clear to the international community that the opportunity to develop a closer, more coordinated and more efficient mutual cooperation must not be missed, in terms of rethinking the way the global aviation transport system is financed, regulated and integrated, in order to achieve the desired resilience and sustainability in the face of any global crisis. The same principle should be applied to the clearly declared intention of all European countries for complete decarbonization of European aviation by 2050.

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