

Aviation: The impact of the COVID-19 pandemic on European airlines

Andrea Antolini Former Researcher JTTRI

【概要 : Summary】

The COVID-19 (corona virus disease 2019) pandemic poses a serious health threat to the people around the globe. Indisputably, the lockdown measures and travel restrictions in many countries are important and necessary to confine the further spread of the virus in order to save lives. These measures include the avoidance of travelling and the interruption of the people's free movement, regionally, nationally and internationally, in order to avoid a further spread of the virus. Also in the EU, the SARS-CoV-2 coronavirus spread and the increase in numbers of COVID-19 victims has forced the EU Member States' governments to take unprecedented measures to stop the free movement of people. The measures include the temporary closure of external borders of the EU and third countries, but also the closure of borders between the individual EU Member States as well as the prevention of movement and non-essential travels between regions and cities within EU Member States. While the transport of goods is still allowed, people are restricted to stay home and only to leave their homes for the most essential purposes of shopping or for medical reasons in almost all EU Member States. This lockdown has wide ranging impacts on all modes of transport within the EU and its Member States. However, in particular, the lockdown has tremendous negative impacts on the aviation sector. The decrease in the number of people who are allowed to travel due to strict

travel restrictions in EU Member States have resulted in a sharp decrease in passenger numbers of airlines. This resulted in planes flying nearly empty, since in the EU, demand collapsed. Meanwhile about 90% of flights have been cancelled in the EU, leading to the grounding of entire fleets of airlines. The article gives a non-exhaustive overview of the travel restrictions in the EU Member States due to the COVID-19 pandemic and its impacts on European airlines. It also shows the measures currently taken to support the aviation industry in this unprecedented crisis.



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【記事 : Article】

1. Lockdown measures and travel restrictions within the EU due to the COVID-19 pandemic
 - 1.1. Restriction of non-essential travel and temporary closure of the EU's external bordersThe global SARS-CoV-2 coronavirus spread and the related COVID-19 disease and pandemic pose a serious threat to public health in all countries around the world. According to a Pew Research Center analysis,

at least 93% of the world's population, or 7.2 billion people, live in countries with some form of travel restrictions on people, due to the COVID-19 pandemic. In particular, there are travel bans in place for tourists, business travellers and new immigrants arriving from other countries who are neither citizens nor residents in that country. About 3 billion people, or 39% of the world population live in countries with borders completely closed to non-citizens and non-residents.

The EU Member States have commonly taken measures to restrict travel from third countries. In order to contain the spreading of the virus, on 16 March 2020, the European Commission recommended to Member States to apply a temporary 30 days coordinated restriction of non-essential travel from third countries into the EU, (COM (2020) 115 final) and the EU heads of states and governments agreed to introduce this temporary restriction one day later. Depending on the further development in the COVID-19 pandemic, this restriction will possibly see a prolongation beyond this period. The temporary travel restriction only foresees exemptions for nationals of all EU Member States and Schengen Associated States (Iceland, Liechtenstein, Norway and Switzerland) for the purposes of returning to their home countries. Exceptions are also foreseen for travellers with an essential function or need. The UK nationals are still to be treated in the same way as EU citizens until the end of 2020.

1.2. Travel restrictions within the EU

The EU Member States have also taken measures to restrict people's movements and travels from one EU Member State to the other, as well as within an individual Member State. Each EU Member State has introduced individual measures in a reaction on their specific situation in the COVID-19 pandemic.

Some EU Member States have introduced border controls at their borders to the neighbouring Member States by mid March 2020. In general, the EU Member States introduced restrictions for non-essential travels for business or touristic purposes and tourist activities. The travel ban not only includes the travels to other EU Member States but it also restricts all travel activities within some EU Member States. Most of the EU Member States have introduced a mandatory self-isolation of residents and have decided to ban all non-essential travel including air travel with or without a time limitation.

The four European Member States Italy, Spain, France and Germany, which are most seriously hit by the COVID-19 pandemic, have banned all non-essential travels, including air travel. In **France**, a travel ban has been introduced for 15 days, starting on 17.03.2020. However given the current expansion of COVID-19 infections, the ban will be prolonged. While travels are restricted, the people are mandatorily staying at home in a lockdown. **Germany** introduced temporary border checks at the land borders with Austria, Switzerland, France, Luxembourg and Denmark on 16.03.2020 until further notice. However, the cross-border flow of goods will continue to be permitted. Cross-border commuters will also continue to be allowed to enter and leave the neighbouring country, like France. There is no general lockdown enforced, but non-essential parts of the economy are shutdown and people are partially restricted in their movements. Travellers with symptoms that may indicate a COVID-19 infection will not be permitted to enter/leave Germany, in coordination with the authorities in the relevant neighbouring country.

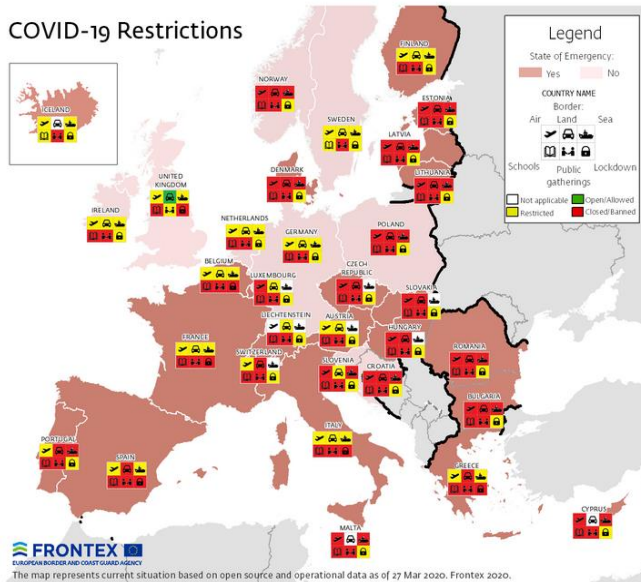


Chart 1: Travel restrictions in Europe as of 27 March 2020

Source: https://ec.europa.eu/info/live-work-travel-eu/health/coronavirus-response/travel-and-transportation_en

In **Italy**, one of the epicentres of the COVID-19 pandemic in Europe, border restrictions and interior travel restrictions started on 14 March 2020. Movement of people is strictly reduced in a lockdown that only allows people to travel solely for shopping for food, health needs or reasons of necessity. These essential needs for movement must be proven by way of a self-declaration, using the printed forms provided by law enforcement officers. Anyone arriving in Italy by air, sea, rail or land transport is required to deliver a declaration to the carrier upon embarkation, which in detail specifies the reasons for the trip. **Spain** has reintroduced border controls on 17 March 2020, which are prolonged until end of April 2020. Only Spanish citizens will be allowed to enter national territory by land. Persons residing in Spain, cross-border workers and those who prove, documentarily, causes of force majeure or a situation of need can enter the country. Movement of people is strictly reduced in a lockdown that only allows people to leave their homes solely for shopping for food, health needs or other reasons of necessity. Spain has also suspended all direct flights between Italy and Spain. Exempted

are stopovers for non-traffic purposes, State flights, Cargo-only, ferry, humanitarian, medical and urgency flights. However, the cross-border flow of goods will continue to be permitted.

Since all these measures may also severely slow down the EU Member States' economies and since the seamless transport of cargo and goods are of crucial importance for the functioning of the EU's internal market, also the European Commission has taken measures to ensure continued and uninterrupted transport services for the transport of goods. Therefore, land, waterborne and air cargo services need to continue without interruption at internal EU Member States' borders. The European Commission has adopted the "COVID-19 Guidelines for border management measures to protect health and ensure the availability of goods and essential services" (C (2020) 1753 final).

Furthermore, in the context of the COVID-19 outbreak, the European Union Aviation Safety Agency (EASA) has developed a template for EU Member States to grant exemptions, for the purposes of allowing aircrews, maintenance engineers and air traffic control officers to extend their licence for four to six months. Similar notifications have been made in respect of airworthiness review certificates. EASA also published a new safety directive on 13 March 2020 that mandates specific interior disinfecting and cleaning of aircraft to control the spread of COVID-19 in the region.

2. The impact of travel restrictions on the EU's aviation sector

The aviation industry is a strategically important sector making a vital contribution to Europe's overall economy and employment. However, the lockdown measures for confining the further spread of the virus and the COVID-19 disease in several EU Member States have a detrimental impact on the EU's aviation industry. On 5 March 2020, the International Air Transport Association (IATA) projected a possible reduction of worldwide revenues of up to \$113 billion in 2020, representing one-

fifth of the 2019 overall revenues. Transatlantic routes between Europe and the US, which earned airlines around \$20 billion in 2019, have been hit by President Donald Trump's 30-day ban for most flights between Europe and the US, which took effect on 14 March 2020. By 17 March 2020, IATA further revised their revenue loss estimate to be \$252 billion globally, a 44% drop compared to 2019.

Due to the EU's internal travel bans, the single aviation market has become fragmented again, as EU Member States put up different lockdown measures. However, since in all EU Member States the air travel is restricted, it has led to the grounding of large parts of the EU airlines' fleet. By 22 March 2020, the number of passengers travelling into and out of European airports had declined by 88%, or 5.2 million fewer daily travellers compared to the year 2019.

3. The European Airlines' measures to survive in the COVID-19 crisis

As a consequence from the outbreak of the SARS-CoV-2 coronavirus and the COVID-19 pandemic and the related complete or partial lockdown measures, the aviation industry finds itself in the most unprecedented situation ever. Due to the travel ban and restrictions of movements of people enacted by the EU Member States' governments, the number of airlines grounding most or all of their fleets has grown rapidly. Air traffic has decreased by around 88% and passenger data from the region's Airports Council International (ACI) reveals an even deeper industry crisis than air traffic statistics indicate. With European aviation coming to a standstill under the lockdown and travel bans in several European Member States, airlines generate little to no revenue currently. At the same time, the airlines have to incur unavoidable fixed costs. Many airlines have suspended operations completely until further notice. Such a decline puts also at risk about 5.6 million jobs, as airlines cut their work force temporarily but also for the long-term.

The Norwegian-based low-cost carrier **Norwegian Air**

Shuttle, indebted and in the midst of restructuring, cancelled 85% of its flights and temporarily laid off 90% of its employees. The biggest European LCCs **Ryanair** and **EasyJet** grounded most of their fleets in late March 2020, which could last until the end of April 2020 at the earliest, depending on how fast the travel restrictions will be lifted. **Ryanair** informed its staff that it might require them to take unpaid leave. Any passenger, whose flight has been cancelled with Ryanair, Buzz, Lauda, and Malta Air, as a result of these travel bans in Europe, will receive options for rescheduling or compensation.

The full-service airline **Air France** cancelled around a total of 3,600 flights for the entire month of March 2020, thereby reducing international and domestic flight capacity by 70-90%. Air France passengers can postpone all tickets purchased prior to 31 May until 30 November 2020, and special fares are also being offered to French citizens to return home. **KLM** stated it would cut 2,000 jobs in the coming months. In March 2020, **Finnair** announced starting negotiations about short-term layoffs for almost its entire work force, as it decreased its flight capacity by 90%, starting from 1 April 2020. The Airlines operating under the **International Airlines Group (IAG)** holding, including Aer Lingus, British Airways, Iberia, Level and Vueling saw a substantial decline in bookings across all airlines and in the entire global network. Between April and May 2020, IAG will reduce its overall capacity by 75% compared to the same period in 2019. British Airways intends to suspend around 32,000 staff. Scandinavia's **SAS** is temporarily laying off 10,000 workers, 90% of its workforce, as it has cancelled most of its flights. **Lufthansa group** had to park 700 of its 763 aircraft of the entire fleet and will send around two thirds of its global workforce, 87,000 employees, on short-time working. All Lufthansa's airlines and subsidiaries in Germany, Austria, Switzerland and Belgium are affected by short-time working. In Germany, those affected will receive short-time compensation between 60% and 67%

of net pay for the work lost. However, Lufthansa has promised to increase this compensation to 90% for ground staff and flight attendants. Lufthansa plans to fly only three international connections per day and 40 inner-European connections, which in total is less than 5% of the airline's previous schedule. Furthermore, Lufthansa decided on 7 April 2020 to restructure its flight operations because of the COVID-19 pandemic and to discontinue its subsidiary Germanwings. In addition, Lufthansa intends to reduce its capacity and administration in the entire Lufthansa Group since the airline expects a further significant drop in demand for air travel after the end of the COVID-19 crisis.

However, many airlines hope that global passenger numbers will follow the same trajectory as in the wake of previous crisis and disruptions, such as after the terrorist attacks of September 11th 2001 or the global financial crisis of 2007-09. This would mean that after a few months of crisis, travel patterns would then revert to normal and growth would resume. However, currently, it is entirely uncertain if this will also be the case after the current pandemic.

The British airline Flybe, which already was struggling under financial problems prior to the virus outbreak, entered in administration on 5 March 2020 due to the pandemic related lockdown. In Europe, the example of Flybe and Germanwings shows, that the impact of the pandemic is expected to accelerate market consolidation in the EU's airline industry. Several airlines could be bankrupt by the end of the pandemic. According to Lufthansa Group's CEO Carsten Spohr, the longer this crisis lasts, the more likely it is that the future of aviation cannot be guaranteed without state aid.

4. Measures to support the European airline industry

4.1. Necessary measures to reduce the COVID-19 pandemic's impact on European airlines

Due to the continuous complete or partial lockdown of the EU Member States and the continuous travel

restrictions of people to confine the spread of COVID-19 disease, about 90% of flights within the EU were cancelled. Consequently, this situation has a detrimental impact of all airlines across Europe. The Airlines for Europe (A4E) association and other airline associations in Europe are demanding immediate action from European institutions and national governments to reduce the economic impact of the COVID-19 pandemic on the aviation sector. Finally, airlines also call on the EU to immediately clarify for airlines and passengers the air passenger rights during this pandemic. The airlines want the EU to count the COVID-19 pandemic as an extraordinary circumstance under the air passenger rights, Regulation (EC) 261/2004. Travel restrictions have been introduced by several EU Member States and third countries. Therefore, consideration should be given as to whether the current re-routing requirement is practical in all circumstances or if a longer timeframe for re-routing could be permitted without giving rise to compensation payments, provided there is appropriate justification. It is the airline associations' conviction that this crisis urgently needs the Commission to revise Europe's air passenger rights regulation. Under the current COVID-19 outbreak, the airlines are facing a situation in which there are no formal rules to limit the financial liability of the European airlines in case of extraordinary circumstances.

Furthermore, regarding the slot regulation, as most urgent action, the airlines called on the EU institutions to immediately grant airlines a temporary waiver on the "use it or lose it" rule under the airport slots regulation for the summer season 2020. Following these most urgent measures in the short term, the airlines need aid for the industry's economic recovery. The airlines call for a deferment or waiver of any new aviation taxes at EU or national level to aid in the sector's future recovery. New fiscal burdens should be postponed until the aviation industry is back on a sound operational and financial footing. This includes the

provisions applicable to aviation in the Energy Taxation Directive (Council Directive 95/60/EC).

4.2. COVID-19 pandemic' s impact on the EU' s air passenger rights legislation

The EU air passenger rights legislation stipulates that in the event of a cancellation, passengers are entitled to rebook the next available flight or at another time of their choosing. If they do not want an alternative, they can choose a refund. However, due to these rules the European airlines are coming now under severe pressure because of the COVID-19 crisis. Therefore, airlines associations like A4E and ERA called on the European Commission to defer or exclude the right on refund in the actual COVID-19 crisis, as an unchanged continuation of the rules “could have serious financial implications for airlines in the short term.” The airlines want national authorities to allow companies to offer travel vouchers as an alternative. Amid the growing impact of the COVID-19 pandemic, on 18 March 2020, the European Commission published guidelines (C (2020) 1830 final) on the application of the European Union passenger rights legislation in the coronavirus crisis. The guidelines underline that Regulation (EC) No 261/2004 is also being applied in the context of the COVID-19 outbreak. The Commission stated that airlines are still obliged to offer refunds to passengers also during the COVID-19 pandemic and the related lockdown and travel bans.

In a joint reaction to the new guidelines, groups representing European airlines including IATA and Airlines for Europe (A4E) stated that particularly the flexibility regarding refunds or vouchers, the Commission' s guidelines are inadequate. IATA and A4E criticised the European Commission' s new guidelines on the application of the EU passenger rights in the COVID-19 crisis for being disappointing and unhelpful, as the guidelines fall far short of the simple and temporary alleviation of compensation rules. The Commission should have rather limited the extensive obligations and should have given the airlines flexibility to allow them to

offer rebooking or vouchers instead of refunds in the event of cancellations due to the pandemic. The pandemic should be considered as an extraordinary circumstance, which would mean that in most current cases compensation for cancellation would not apply. However, the Commission' s response was that airlines are potentially responsible for unlimited care to passengers who have been stranded as a result of government decisions. In particular, the Commission rejected the request for flexibility to offer rebooking or vouchers instead of refunds.

4.3. Temporary suspension of slot requirements under the COVID-19 pandemic

Important decisions have been taken regarding the suspension of slot requirements during the current COVID-19 pandemic. In general, the capacity constraints and continuous growth at EU' s airports following the creation of a single market for aviation in the EU in the 1990s, there was a need for a regulation on slots at EU airports. In 1993, the common rules for the allocation of slots at EU airports were introduced in order to ensure that airlines have access to the busiest EU airports on the basis of principles of neutrality, transparency and non-discrimination, based on the principles governing the system of slot allocation (IATA Worldwide Scheduling Guidelines). Airlines must use 80% of their allocated slots under the “use it or lose it” rule, otherwise they are at risk to losing their slots in the years following. While the European Commission' s proposal for a “recast” of the Slot Regulation is still under scrutiny in the legislative procedure between the Council and Parliament, the COVID-19 pandemic and related travel bans has forced the EU institutions to taking urgent measures to support the affected airlines in Europe. In the beginning of the lockdown in several EU Member States, many airlines were operating “ghost flights” , flying empty planes with no passengers in order to hold onto their take-off and landing slots for certain routes. However, meanwhile, both, the European Commission and the Federal Aviation

Admission (FAA) suspended the slot allocation rules and requirements to airlines in order to hold onto their allotted time slots.

On 20 March 2020, the Council of the European Union agreed its position on temporarily suspending the slot requirements. The EU Member States' ambassadors in the Council's Permanent Representatives Committee approved a mandate for the presidency to negotiate with the European Parliament a proposal to temporarily suspend this "use it or lose it" rule from 1 March until 24 October 2020 in order to help airlines to cope with the COVID-19 pandemic impacts. The amendment needs to be approved by the Council and the European Parliament and they both are working to finalise the proposal as a matter of urgency. The A4E association welcomed the extension of temporary airport slot rules' waiver until the end of the airlines' summer schedule. If the current serious situation still persists thereafter, the measure could be extended quickly by means of a Commission delegated act. It will also apply retroactively from 23 January to 29 February 2020 for flights between the EU and China or Hong Kong. The temporary suspension of the slot requirements will provide the necessary flexibility and certainty for the EU's aviation industry in this unprecedented situation. It is an absolute priority for the Croatian EU presidency to have this amendment adopted as soon as possible.

5. The pandemic's possible long-term impact on the European aviation industry

Whereas in the US, four airlines control around 80% of the US aviation market, the European aviation market remains rather fragmented. However, the current travel ban under the COVID-19 pandemic has a detrimental impact on the European aviation industry and could reshape the entire market by accelerating the consolidation process in the aviation sector. No airline in the EU is exempt from the short-term negative impacts of the COVID-19 pandemic and it is a crisis in which only the economically and strategically fittest airlines will be able to

survive. Therefore, this crisis could accelerate the consolidation of the European aviation sector. The first impacts in this direction can be observed in case of the British regional airline Flybe's collapse and in the Norwegian Air's stock loss of about 70% of its value in a month, with no end to the crisis in sight. Furthermore, Alitalia, which had already many financial problems before the coronavirus outbreak, could be one of the airlines to face severe problems to recover from the impacts of this travel ban. Also Lufthansa's decision to discontinue its subsidiary Germanwings accelerates a further consolidation of the EU's aviation market. Flybe's and Germanwings' demise reduces price competition on routes they shared with other airlines. Their market exit as well as that of other airlines would support the competitors' fares and traffic policy. Therefore, a possible acceleration of bankruptcies in the European airline industry due to the travel bans could lead to a further consolidation in the European aviation market. However, this could also lead to an increase of airfares due to the fact that the competition on the ticket prices will cede to exist on certain routes. It remains to be seen to what extent the European aviation market will experience a consolidation in the wake of the COVID-19 pandemic.

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