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EUROCONTROL

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ARMATS CJSC - Armenian Air Traffic Services
Mr Artur GASPARYAN
Director General
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ARMENIA

Dear ~~Mr Gasparyan~~, Artur

I hope the New Year has started well for you despite the difficult times we are facing.

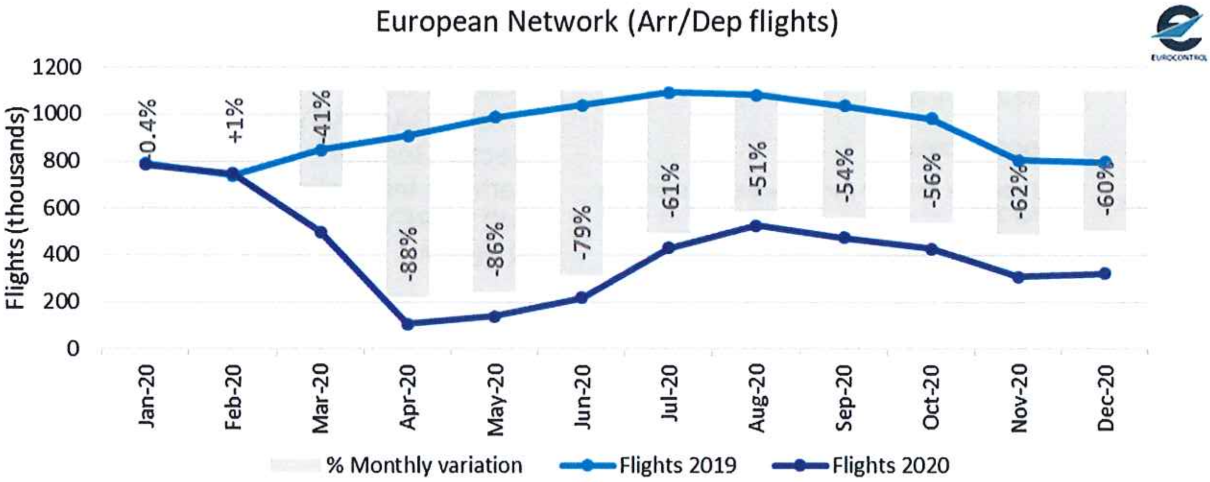
2020 was perhaps the most challenging year ever and we already know that 2021 will be full of hardship for aviation. EUROCONTROL has been trying hard since the beginning of this crisis to support the industry and take initiatives aimed at minimising the impact of COVID on the sector. We will continue to do so.

In this update, we are looking at the performance of the network and of Armenia in 2020, including our latest traffic scenarios for Europe for the coming months. Sadly, things are deteriorating again right across Europe and we can see that the roll-out of the vaccine will be slower than we would have hoped for in many States. However, I do hope that by the summer we will see the start of a restoration of traffic across Europe in general and in Armenia in particular.

I was pleased to see that the level of new cases in Armenia has dropped significantly since the high in October/November. I very much hope that this trend will continue, especially with the rollout of vaccination programmes across Europe, and that European aviation can recover sooner rather than later.

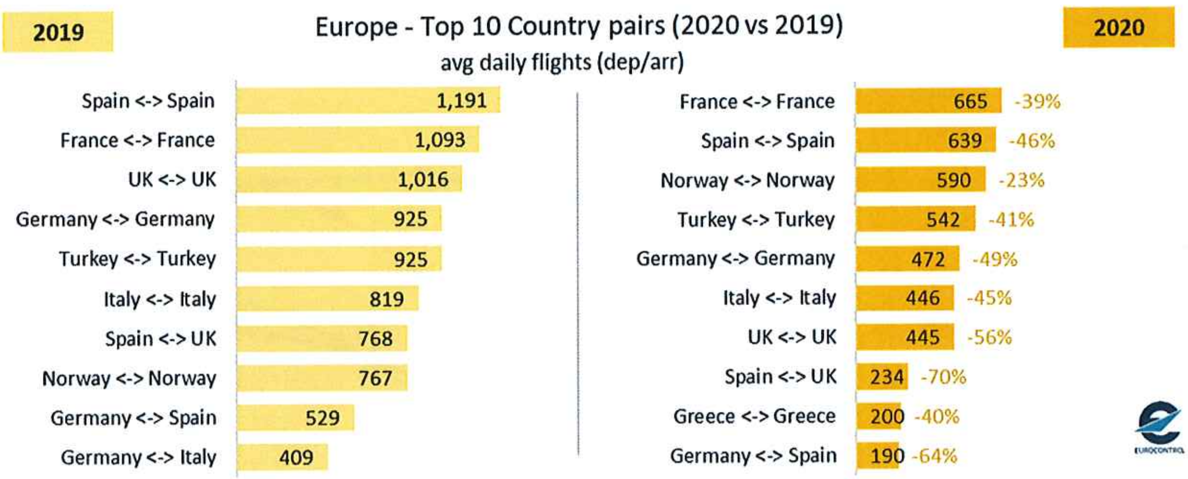
Performance during the period – European Network

At network level, the number of flights was down on average by 55% on 2019 i.e. 13,620 average daily flights for 2020. In total, 5.0 million flights operated in 2020 compared with 11.1 million in 2019, a fall of 6.1 million flights. The graph below illustrates the profile of traffic levels over the year. Although there was a promising recovery during the months of June to August, it stagnated and started to degrade in September.



The top 10 airlines in terms of average daily flights (departures/arrivals) for the network during the year, compared to the previous year, can be seen below.

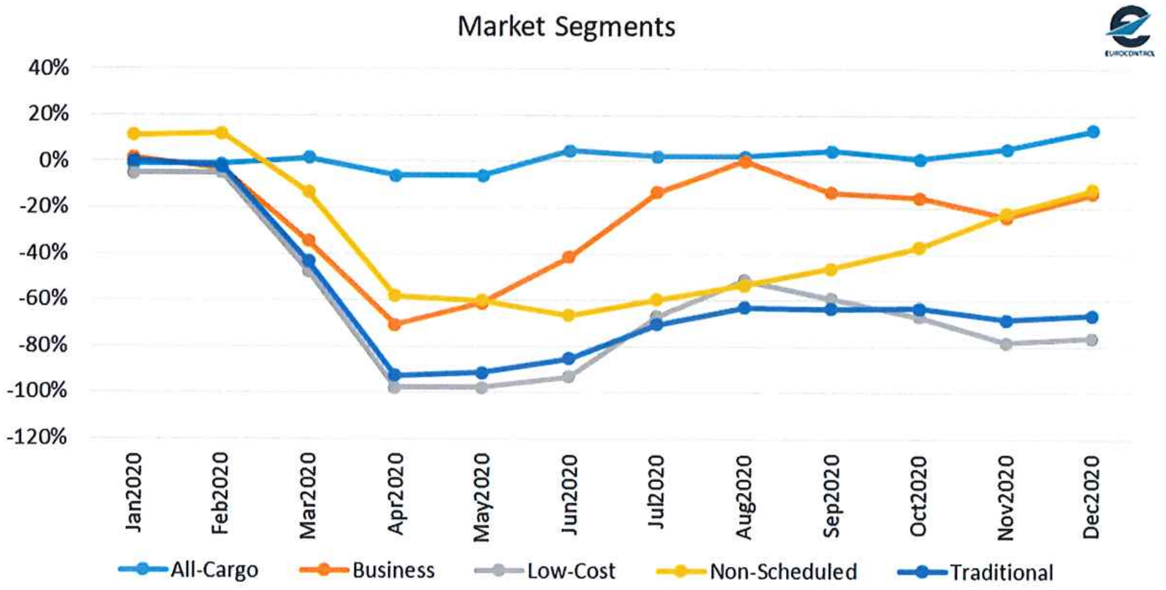
The following figure presents the top 10 country pairs in terms of average daily flights (departures/arrivals) during the year, with the 2019 comparison.



Looking at airports, the following table presents the top 20 airports for the European Network.

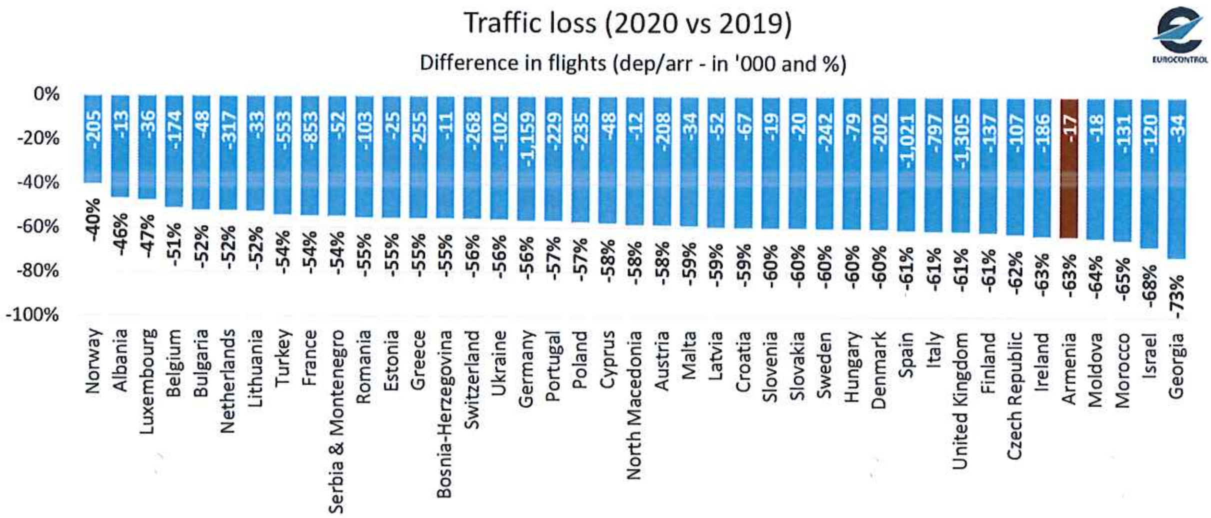
AVERAGE NUMBER OF DAILY MOVEMENTS (Arrivals + departures)					
Airport	Jan-Dec 2020	% change vs 2019	**Airport**	Jan-Dec 2020	% change vs 2019
Schiphol	644	-54%	Athens	298	-51%
Paris CdG	603	-56%	Vienna	295	-62%
Istanbul (IGA + Ataturk)	596	-53%	Zürich	288	-61%
Frankfurt	580	-59%	Rome Fiumicino	283	-67%
Heathrow	559	-57%	Copenhagen	268	-63%
Madrid-Barajas	453	-61%	Milan Malpensa	253	-60%
Munich	394	-65%	Brussels	250	-60%
Istanbul SG	339	-46%	Lisbon	244	-60%
Barcelona	335	-65%	Dublin	237	-64%
Oslo	335	-51%	Stockholm Arlanda	235	-63%

As for the evolution of the main aircraft operator market segments, these have been unevenly impacted by the pandemic, as the figure below shows, with all-cargo being least affected (+2% on average against 2019) and low-cost being the worst-hit of all the segments (-64% on average against 2019) .



Focus on Armenia

Looking at the entire year, traffic loss for Armenia was on average 63% or some 17k flights lower (arrivals and departures only) when compared to the previous year.



If we consider also overflights, there were on average 56 IFR daily flights in Armenia controlled by ARMATS, 69.2% lower than in 2019 (the corresponding decrease for the network as a whole was 55.2%). This decrease reflects the massive impact of the COVID-19 crisis and is even greater when we focus only on April-December period i.e. 28 IFR daily flights or 84.9% lower than in the same period in 2019.

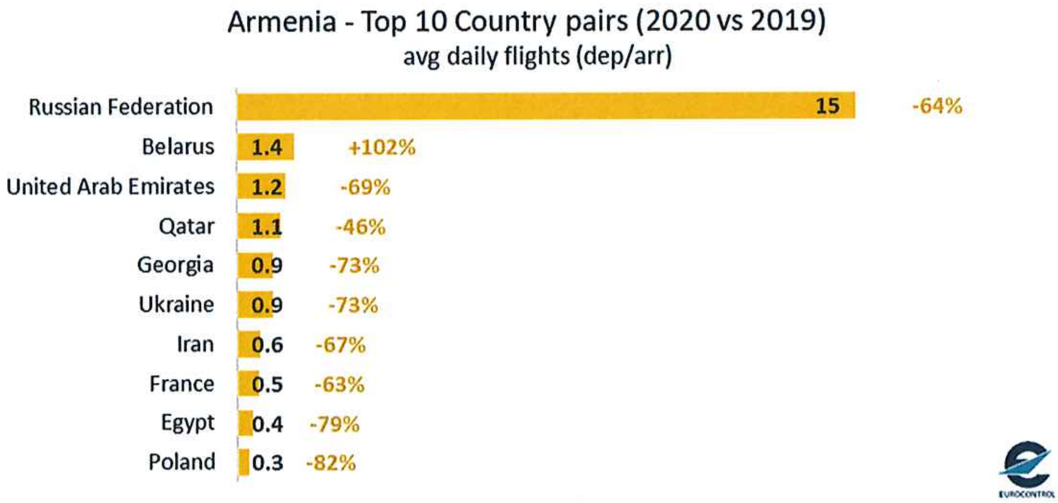
The following tables present the situation at ACC level and for the main airport in Armenia.

AVERAGE NUMBER OF DAILY FLIGHTS - ACC (including overflights)		
ACC	Jan-Dec 2020	% change vs 2019
Yerevan ACC	51	-68.9%

AVERAGE NUMBER OF DAILY MOVEMENTS (Arrivals + departures)		
Airport	Jan-Dec 2020	% change vs 2019
Yerevan	26	-63.4%

The top 10 airlines for flights to/from Armenia for 2020 compared to the previous year can be seen in the graph below.

Looking at this another way, for flights to/from/within Armenia, the top 10 countries are shown below:



Environment

A key part of building aviation back better after this crisis is making it more sustainable. That includes operating more efficient aircraft – and we have already seen older aircraft being retired with airlines focusing on operating their most efficient fleet.

EUROCONTROL has been involved in a number of actions to help, including adapting the ETS Support Facility to include Switzerland (and continue the support to the UK); deploying the new CORSIA Reporting Tool; working to deliver studies such as the new ATM Network Fuel Inefficiency Study; developing proposals on how to improve ATM/ANS environmental transparency, including looking at new metrics; and continuing to develop our ICAO-approved environmental tools such as IMPACT and open-ALAQS. Communicating developments, sharing best practices and developing training courses all contribute to making the entire sector more aware of sustainability and how we can all improve our performance.

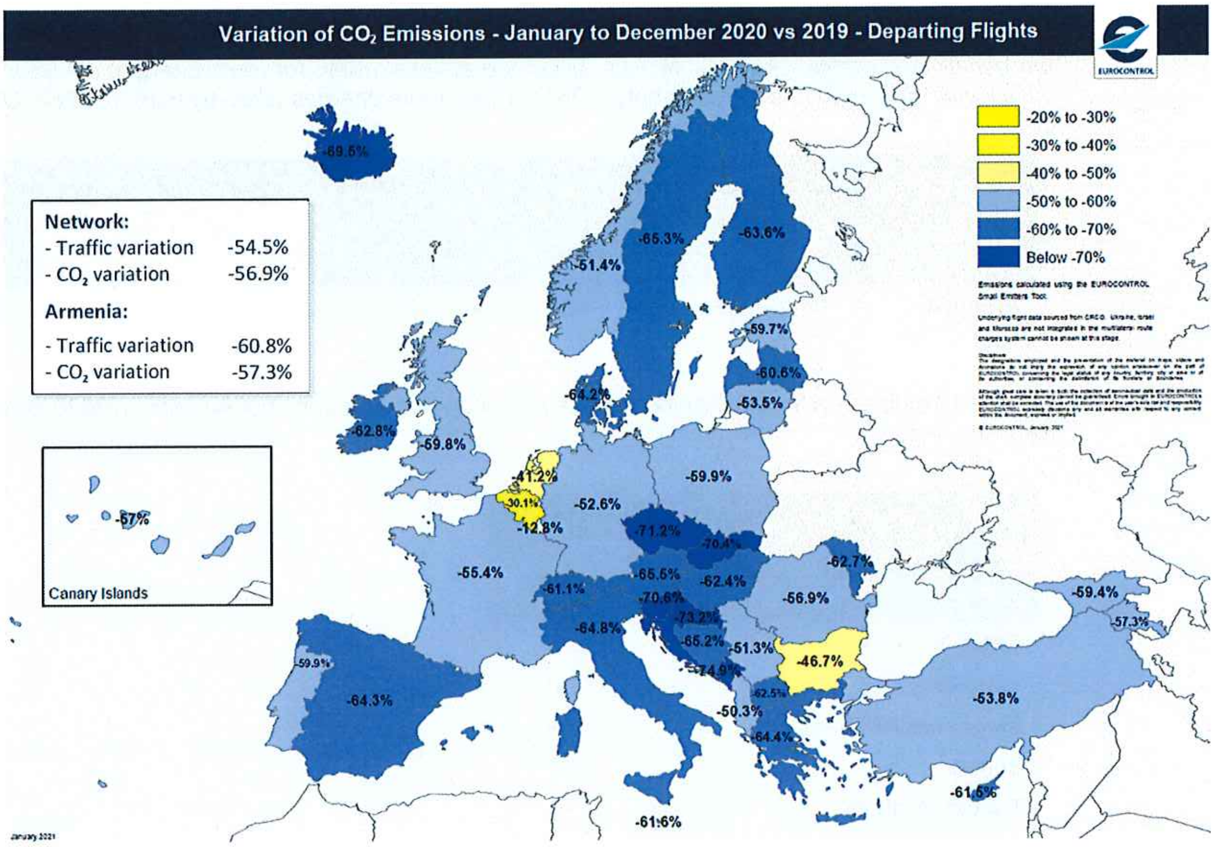
On continuous descent operations (CDO), the objective is to minimise the amount of time flown at inefficient intermediate level flight segments during the descent phase, which results in a higher amount of fuel being burned. We have looked at the amount of time flown level during descents into Armenian airports. From January to December 2020, this was an average of 61.4 seconds per descent, 1.8 seconds lower than in the same period last year (for context, the average for major European airports in 2020 was 133.5 seconds). This is a positive environmental performance improvement, although it may have occurred largely due to the lower levels of traffic.

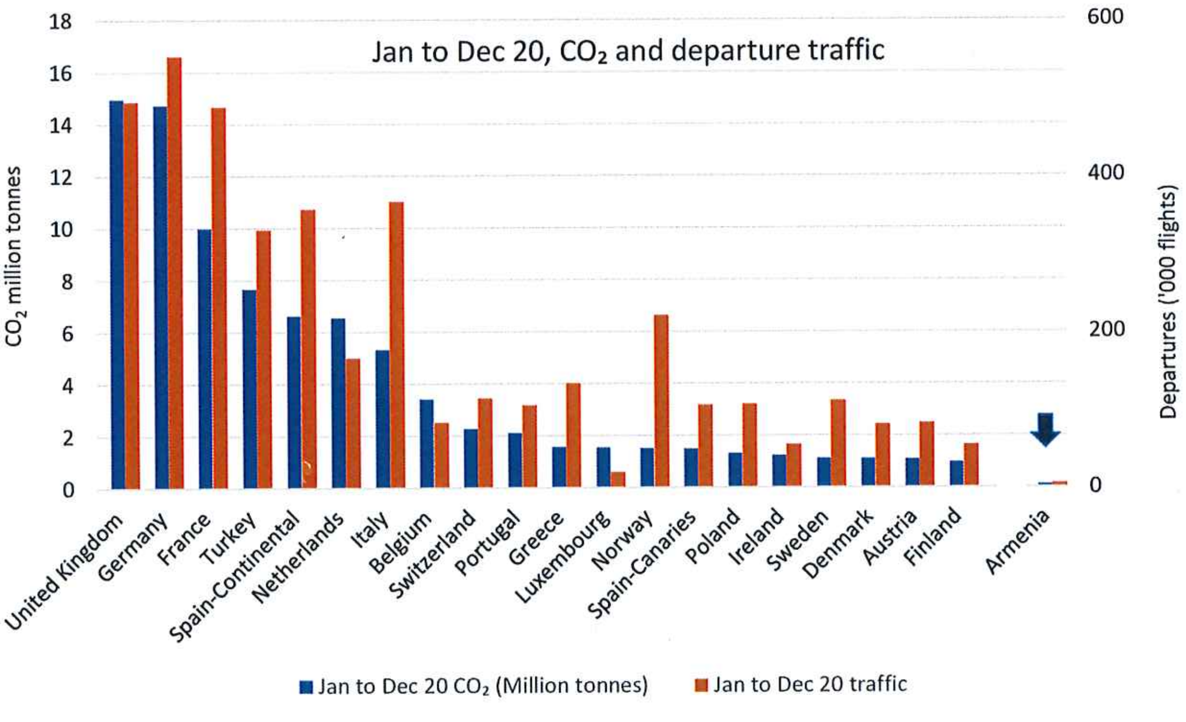
A more detailed view of CDO performance at European airports is provided in the vertical flight efficiency section of the EUROCONTROL Aviation Intelligence Portal.

Regarding emissions, we have estimated the CO_2 emissions for the entire flight of an aircraft taking off from your country. This excludes overflights and arrivals from outside your country. On this basis, the CO_2 emissions for Armenia in 2020 amounted to 0.11 million tonnes, 57.3% less than in 2019 (for context, the number of flights responsible for these emissions decreased by 60.8%).

The results of the analysis of estimated CO_2 emissions by departing country can be seen below. The variation between states resulted from a range of factors, including how much COVID-19 has affected that country's flights, the size and age of aircraft, how far they are flying and the mix of market segments.

The map shows the emissions variation and the chart shows emissions for flights taking off from airports in your country, compared to those of the countries with the highest emissions in 2020.





En-Route charges

For the EUROCONTROL route charges area, the total amount billed to airspace users for the year was 3.2 B€, which represents a decrease of 59.5%, or 4.7 B€ less than in 2019.

On behalf of Armenia, EUROCONTROL billed the airlines 1.8M€ for route charges in 2020. This amount is 71% lower than in 2019 and represents 0.05% of total route charges billed by EUROCONTROL.

ROUTE CHARGES 2020 (% vs 2019)													
En-route Charging zone	Jan-20	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	**Total**
Armenia	-18%	-24%	-44%	-84%	-80%	-80%	-88%	-92%	-89%	-91%	-86%	-87%	**-71%**

The top 10 airlines (in terms of route charges amounts) billed on behalf of Armenia in 2020 can be found in the following table:

ROUTE CHARGES 2020	
Top 10 airlines	M€
Qatar Airways	0.36
Emirates	0.16
Singapore Airlines	0.08
Etihad	0.07
Turkish Airlines	0.06
Russian Military	0.06
Aeroflot	0.05
flydubai	0.05
Cargolux	0.05
Air Arabia	0.05

Latest traffic scenarios 2021

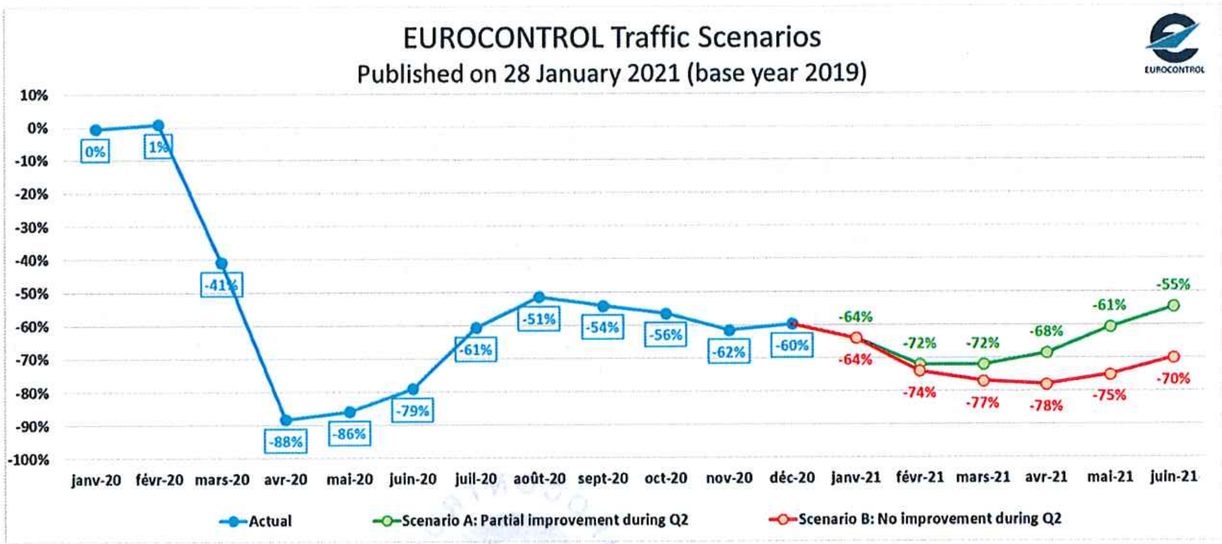
The first month of 2021 is expected to be approximately -64% down on January 2019, which is close to the EUROCONTROL short-term draft traffic scenario we last published on 14 September 2020. In response to the latest waves of COVID and risks associated with new variants, many States across Europe are imposing measures on travel, which strongly discourages air travel unless it is for essential reasons. As a result, demand is greatly suppressed and airlines are dramatically reducing their capacity accordingly. In fact, air traffic within Europe has declined by approximatively 20% over the last 2 weeks alone. It is clear that the months of February and March will be exceptionally low across the network, except for cargo, some business and skeleton schedule services. Even April is expected to perform very poorly with only a limited pick-up for the Easter period.

What remains unclear currently is the situation thereafter. It is reasonable to expect that the epidemiological situation will have improved in many European States by Q2 and that the most vulnerable citizens across Europe will have been vaccinated (despite delays in the roll-out). In turn, this could lead to the possibility for non-essential air travel to become more accessible, which would facilitate a small improvement during Q2, followed by a larger recovery in the summer period.

However, it is also reasonable to expect, even if the epidemiological situation has improved by Q2, that many States may potentially will continue to act in an uncoordinated fashion and chose not to relax their national travel restrictions, which will severely curtail demand and the possibility for air travel to start to recover until the Summer period at the very earliest.

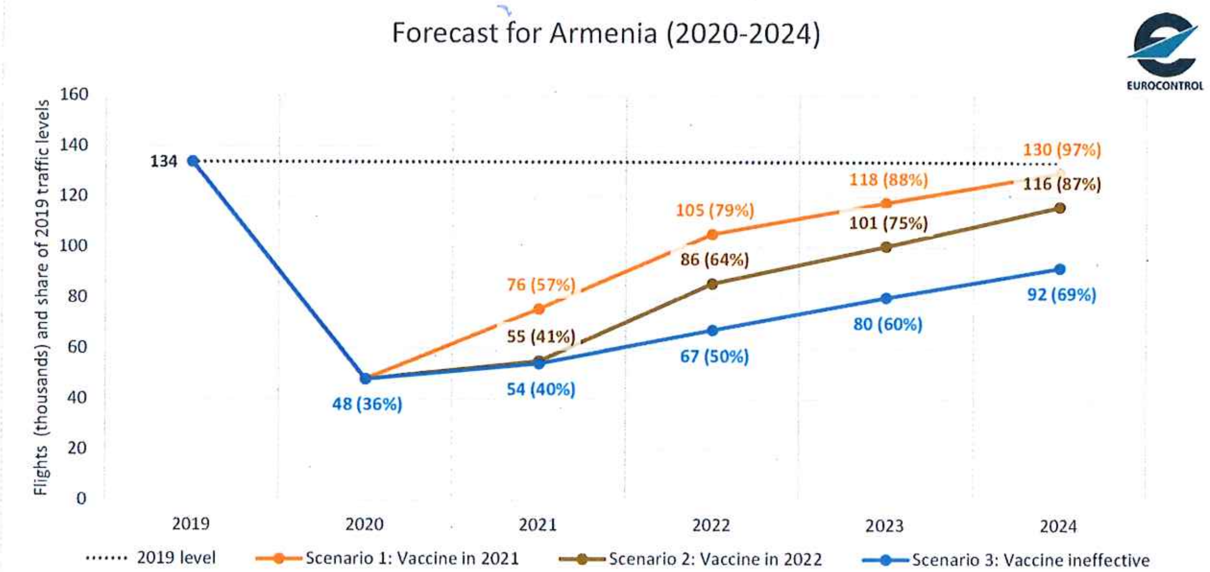
We summarize the situation between now and the end of June 2021 as follows:

- Scenario A. Partial improvement during Q2: The overall European situation improves, facilitating the partial relaxation of national travel restriction measures during Q2.
- Scenario B. No improvement during Q2: Very limited improvements in the overall European situation and/or we see the continued imposition of national travel restriction measures preventing any reasonable improvement in air travel until at least Q3.



We published a Network forecast in November 2020 with a number of scenarios based mainly on the timing of vaccines (the most crucial factor for full recovery). At the time of publication, we considered Scenario 2 to be the most relevant, based on vaccines being widely available for travellers by the summer of 2022. At a country-level, the traffic growth foreseen in Armenia under Scenario 2 is +15% in 2021 compared to 2020 (Scenario 1: +58%, Scenario 3: +13%). By 2024, according to Scenario 2, the traffic would reach 87% of 2019 traffic levels (Scenario 1: 97%, Scenario 3: 69%).

However, please note that the impact of COVID generating a significant suppression of traffic until the middle of 2021 is something which was not fully anticipated. However, we still believe that scenario 2 of our traffic forecast of November 2020 remains reasonable.



EUROCONTROL will continue to provide vital support during this critical period. Aviation is an essential part of Europe's economic recovery in the months ahead. I am very grateful for your continued support and be assured that EUROCONTROL is ready to assist you particularly during these difficult times.

Please feel free to share this information in briefings for your staff and stakeholders. If you have any queries, need any more information, or if you can suggest any improvements, please contact me.

To conclude, I hope that his letter has provided you with relevant information on your situation during this crisis as well as information on our activities to support European Aviation. On a personal note, I hope your family, friends and you are well. It's not easy, but we will prevail.

Yours sincerely,

Eamonn BRENNAN,

Director General

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