Regional: Southeast Asia Aviation: COVID-19 Impact and Short-term Strategy

Project Name: Southeast Asia Aviation: COVID-19 Impact and Short-term Strategy  
Project Number: 55319-001  
Country / Economy: Regional Cambodia Indonesia Lao People's Democratic Republic Philippines Thailand Timor-Leste Viet Nam  
Project Status: Closed  
Project Type / Modality of Assistance: Technical Assistance  
Source of Funding / Amount: TA 6889-REG: Southeast Asia Aviation: COVID-19 Impact and Short-term Strategy  
Operational Priorities: OP6: Strengthening governance and institutional capacity  
OP7: Fostering regional cooperation and integration  
Sector / Subsector: Transport / Air transport  
Gender: No gender elements  
Description: The regional technical assistance will carry out a landscape study of aviation industry for the Southeast Asia region, covering pre COVID-19 development and COVID-19 impact, and forecasting the passenger and freight demand in different recovery scenarios with recommended policy and strategy. Events such as workshops and seminars will then be organized to present and share the initiatives to the stakeholders in DMCs.  
Project Rationale and Linkage to Country/Regional Strategy: The coronavirus disease (COVID-19) pandemic has had a devastating impact on the global aviation industry, as nearly all air travel were adversely affected by measures such as border closures, entry restrictions, quarantine requirements and domestic travel restrictions. Globally, the total number of flights is estimated to decline by about 58% in 2020 compared to 2019 with volume of air passengers declined more than 60%. It is estimated that more than half of the aviation related jobs across economies are at risk in 2020, which put at risks the livelihoods of 46 million people. Southeast Asia countries were no exception as several countries implemented bans on international and domestic air travel to contain the spread of the COVID-19. International aviation activity in the region was estimated to have decreased by 70% in 2020 compared to 2019, while domestic aviation fared a bit better with reduction in aviation activity of 33% compared to 2019. To address the challenges associated with the pandemic while also ensuring recovery of the aviation industry and economy, DMCs will need to introduce a balance response between interventions that safeguard the public health and stimulate the air traffic recovery. This TA aims to: (i) gather information on the current Southeast Asia aviation landscape and (ii) identify and prepare for immediate/short-term priority plans. This will provide the first step in strengthening the planning for aviation recovery.  
Impact: Economic growth through aviation industry recovery  
Fostering regional cooperation and integration  
Project Outcome: Knowledge and capacity for preparing and implementing strategic plans for the aviation sector improved  
Progress Toward Outcome: A consultation webinar was conducted on 11 October 2022 with key stakeholders, and all participants reported the recommendations made in the study are helpful. A knowledge product titled Landscape Study on Southeast Asia’s Aviation Industry was published in May 2023. 2 knowledge sharing webinars to disseminate the knowledge product after its publication were conducted on 15 and 16 June 2023. There are more than 100 participants in each webinar, and all participants reported satisfaction of the webinar, indicating their enhanced knowledge by attending the webinar.  
Implementation Progress: Short-term policy and strategy recommendations for the aviation sector’s post-COVID-19 recovery developed  
Knowledge sharing among Southeast Asian DMCs promoted  
Status of Implementation Progress (Outputs, Activities, and Issues): 1a. A landscape study was published on ADB website with analysis/case studies of 7 DMCs on aviation sector.  
1b. 20 recommendations on post pandemic strategies for aviation sector recovery were made in the study.  
2a. A knowledge product titled Landscape Study on Southeast Asia’s Aviation Industry was published in May 2023.  
2b. 2 knowledge sharing webinars to disseminate the knowledge product after its publication were conducted on 15 and 16 June 2023.  
Geographical Location: Cambodia - Nation-wide; Indonesia - Nation-wide; Lao People's Democratic Republic - Nation-wide; Philippines - Nation-wide; Thailand - Nation-wide; Timor-Leste - Nation-wide; Viet Nam - Nation-wide  
Summary of Environmental and Social Aspects:  
Environmental Aspects: N/A  
Involuntary Resettlement: N/A  
Indigenous Peoples: N/A  
Stakeholder Communication, Participation, and Consultation: N/A  
During Project Design: N/A
During Project Implementation

A draft version of the study was shared with key stakeholders in September 2022. In addition, a consultation webinar was conducted on 11 October 2022 with key stakeholders in both public and private sectors to get their comments. The comments and feedback were considered in the final publication.

### Business Opportunities

**Consulting Services**

Individual consultants (one aviation planning consultant and one aviation finance consultant, both international). Transport and Communications Division of ADB's Southeast Asia Regional Department will engage consultants and carry out procurement following the ADB Procurement Policy (2017, as amended from time to time) and its associated staff instructions.

**Procurement**

No anticipated procurement of goods or works.

- **Responsible ADB Officer**: Luo, Yidan
- **Responsible ADB Department**: Sectors Group
- **Responsible ADB Division**: Transport Sector Office (SG-TRA)
- **Executing Agencies**: Asian Development Bank

### Timetable

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### TA 6889-REG

#### Milestones

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### Project Page


### Request for Information


### Date Generated

09 March 2024

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