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SOVIET CIVIL AVIATION OPERATIONS

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Trends in Soviet Civil Aviation

1. Aeroflot, the Soviet national airline, is the world's largest. Serving over 3,500 cities and towns in the Soviet Union and 68 foreign countries over a 500,000 mile route network, the airline carried 91 million passengers in 1974, one fourth of the world's total air passenger traffic. Despite the scope of these far ranging services, Aeroflot has traditionally lagged behind major Western airlines, particularly in safety standards, quality of service and fleet modernization. Over the past three years, the Soviets have been concentrating on these key areas to improve their relatively poor image and to bring Aeroflot service closer to Western standards.

Fleet Modernization

2. Aeroflot's fleet modernization program is one of the hallmarks of recent changes. After lagging behind Western carriers for two decades, Aeroflot started to add newer aircraft during the early 1970's. Its current inventory of high

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performance jet aircraft, which has almost doubled in the past five years, is now approaching 1,000 aircraft.

3. Fleet modernization has included the introduction of the short take-off and landing (STOL) YAK-40, the improved TU-134A, the medium to longer range TU-154, and the long range IL-62M, the current flagship of the fleet. Over 450 of these aircraft have been added to Aeroflot's fleet in the past three years.

4. In addition, Soviet design bureaus are developing several new aircraft scheduled for introduction over the next several years. These include:

. The Supersonic TU-144: Soviet officials indicate the aircraft will begin limited scheduled service between Moscow and Tashkent and Frunze by the end of 1975. Although historically optimistic about inaugural flights of new aircraft, the Soviets will push to beat the Concorde into service, which is now scheduled for early 1976.

. The IL-76: Despite initial Soviet claims that this longer range cargo transport was primarily for civil use, most of the limited production has gone to the military. Nevertheless, Aeroflot has acquired a few of the aircraft and, as production increases, it is expected that the IL-76 will enter service on a few domestic cargo routes by early 1976.

. The YAK-42: Basically an enlarged version of the highly successful YAK-40, the 100 passenger YAK-42 is slated to replace the YAK-40 on routes where accelerated traffic growth is expected. The aircraft first flew in early March and may enter service by 1976.

. The IL-86 Airbus: Despite many delays, Soviet officials intend to move forward with production of the IL-86 -- the USSR's wide-bodied aircraft. Although its

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estimated range of 2,000 miles is less than half that of many Western models, the IL-86 would be well suited for Aeroflot's high density routes -- both domestic and international. Under the most optimistic projections, the IL-86 could not begin service before 1978-79.

Improved Service

5. The modernization program has allowed Aeroflot to improve overall operations by increasing the frequency of flights, adhering to schedules, and providing more comfortable travel. The new aircraft have been added to almost all of Aeroflot's international services and more than half of its domestic routes.

6. The most dramatic changes in service in recent years have occurred in Aeroflot's domestic services. Although accounting for over 96 percent of the passengers carried, domestic operations have traditionally been the last to receive new equipment. New aircraft have been added to domestic routes in increasing numbers over the past few years, however, allowing for expanded services. For example, the STOL YAK-40, capable of operating from unimproved airfields, is replacing the aging AN-24, allowing new services to over 200 rural locations in European Russia and Siberia. For medium and longer range flights, the TU-134A, TU-154 and IL-62M have replaced about half of the 350 IL-18 turboprop aircraft in Aeroflot's inventory.

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7. Aeroflot's international routes also have been upgraded and expanded with newer aircraft and additional flights. Nearly all of the 170 weekly international flights are now served by TU-134As, TU-154s and IL-62Ms, many of which were put into service since 1972. Outdated TU-104s and TU-124 jets, and in some cases IL-18s, had previously been used on many of these routes.

8. Since 1972 the Soviets have focused on expanding service to Sub-Saharan Africa and Latin America. Efforts in Africa has been the most successful and air agreements have been concluded with Burundi, Chad, Equatorial Guinea, Mauritius, Rwanda and Zaire. Aeroflot flights were inaugurated to Ndjamena, Chad and Malabo, Equatorial Guinea last December. Service to the remaining countries is likely to begin this year.

9. The Soviets continue to press for expanded service to Latin America -- the last major gap in Aeroflot's route network. Currently, the only countries served are Cuba and Peru. Although talks have been held with several countries -- including Argentina, Brazil, Columbia, Ecuador, Mexico, Panama and Venezuela -- most are still in the exploratory stage. Two exceptions are Ecuador and Venezuela, where Aeroflot service may begin this year. Elsewhere in the world, Aeroflot has added service only selectively, the most recent being to Portugal in early March.

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Safety

10. Aeroflot was jolted into action on civil aviation safety following a year long series of accidents which began in late 1972. During this period, at least 10 Aeroflot aircraft crashed, killing at least 600 persons. Although poor quality onboard avionics and outdated air traffic control may have increased the chances of an accident, the primary cause of the crashes was pilot error and inclement weather. In any event, the USSR launched a program to improve safety and Aeroflot took the following steps:

- . Established an Aviation Safety Committee within the Ministry of Civil Aviation (MGA) to investigate safety procedures and probable causes of accidents.

- . Upgraded operational testing of new civil aircraft and provided for more stringent preflight crew checks.

- . Inquired into Western air traffic control procedures and equipment for possible applications to the USSR.

11. Recent Soviet emphasis on safety is genuine and has met with success. Since the flurry of accidents, Aeroflot has had only one confirmed crash in 1974 and none thus far in 1975.

Outlook

12. Soviet efforts to modernize Aeroflot's fleet and improve overall operations will continue through the next several years, bringing it closer to Western standards.

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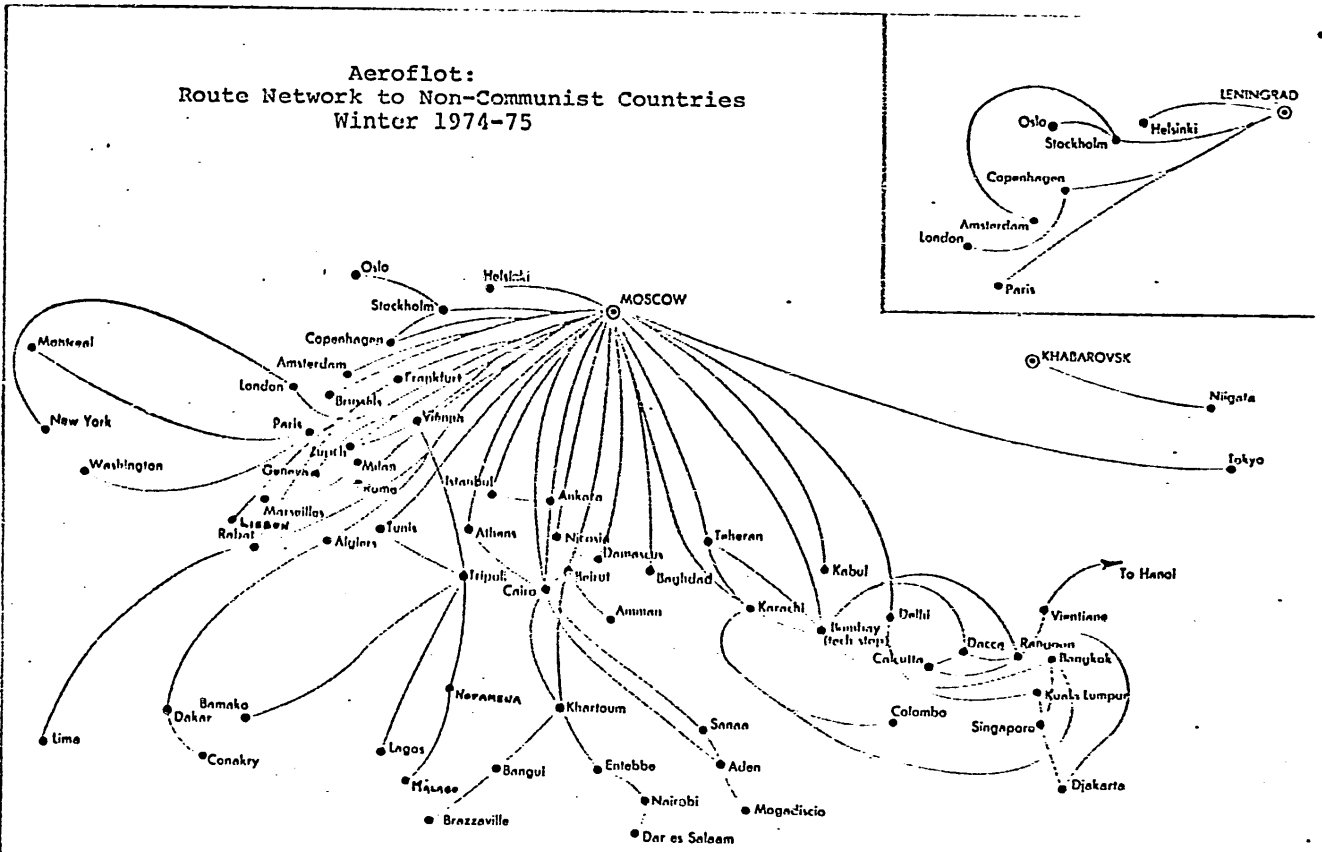
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The introduction of new aircraft will allow more efficient operations and provide for better quality service. At the same time, additional routes can be added and existing services expanded. The use of more modern aircraft coupled with the anticipated purchase of advanced avionics and improved air traffic control procedures will improve Aeroflot's safety standards. In general, the overall program will enhance Aeroflot's relatively poor image by Western standards and provide it with one of the world's largest and most varied fleet of civil aircraft.

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Aeroflot:
Route Network to Non-Communist Countries
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