



Osprey Flight Solutions

# A new age for aviation risk management

18 February 2022

## Russia-Ukraine Situation Update



## Welcome

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*Tensions remain high between Ukraine and Russia over Russian military deployments into Belarus, as well as to the Crimea, Voronezh oblast, Rostov oblast and Krasnodar Krai, located adjacent to the eastern Ukrainian regions of Donetsk and Luhansk. The US, UK, EU and NATO have all made statements in support of Ukraine and called on Russia to avoid escalating the situation along the border. Meanwhile, Russia has accused Ukraine of inflaming the conflict in Donetsk and Luhansk, while accusing NATO of conducting increased levels of air and naval activity in the Black Sea in the past three months.*

*Divisive public statements by officials from the Russian, Ukrainian and Western governments have played a notable part in inflaming tensions. The recent security talks between Russia, Ukraine and Western governments have failed to alleviate tensions and though Osprey views the diplomatic engagements to be a positive step aimed at de-escalating the situation, they have thus far been fruitless. While there are no indications that Russia or Ukraine intends to kinetically target legal civil aviation flights, Osprey assesses there is an increasing potential for miscalculation and/or misidentification. The airspace operational situation over portions of Ukraine, Russia and the Black Sea remains fluid and subject to rapid change.*

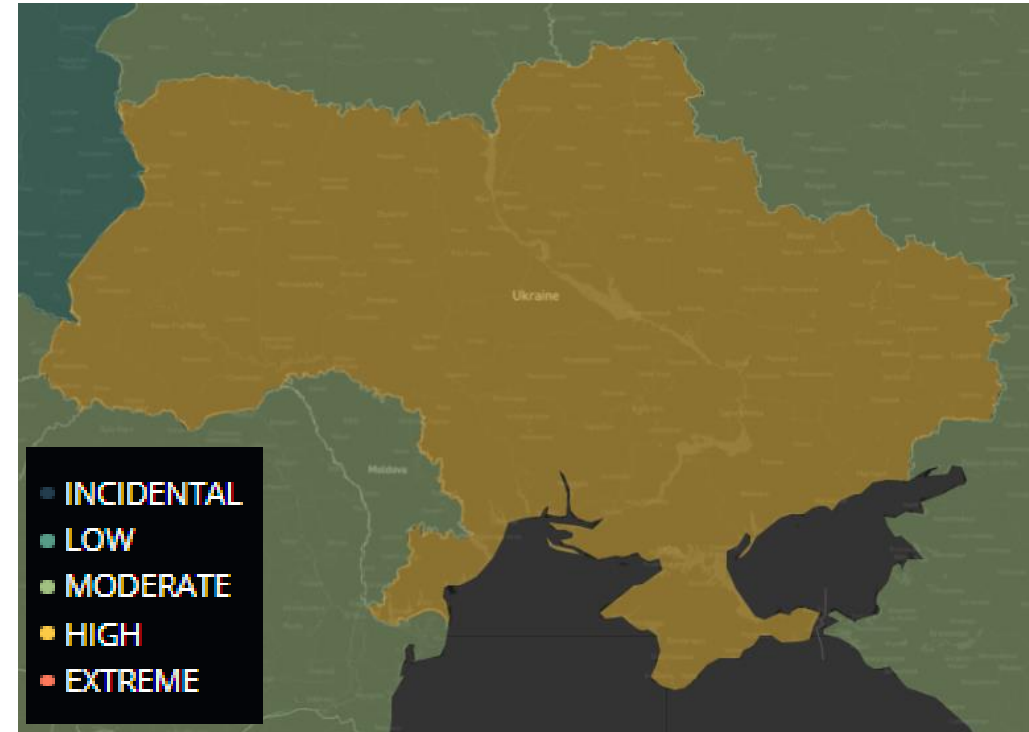
# Russia-Ukraine Situation Update

Diplomatic, Operational,  
Insurance, Regulatory & Risk  
Developments

# Russia-Ukraine Situation Update

## Key Diplomatic Developments:

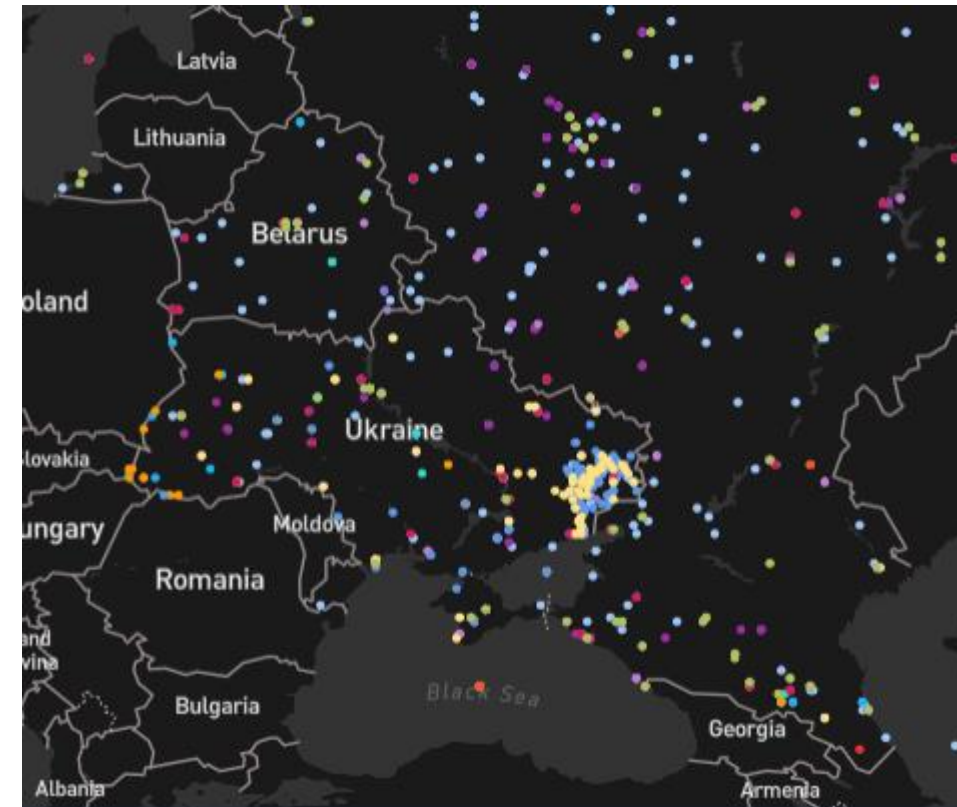
- German Chancellor visits to Ukraine & Russia 14/15 Feb
- Russia rejected Ukraine's request for consultations under the Minsk Agreement Vienna Document
- Russian State Duma voted to recognise separatist DPR and LPR as independent
- Numerous foreign governments - including the US, UK, Germany, Belgium and the Netherlands - are advising their nationals to defer travel to Ukraine or depart the country
- Several governments decreasing diplomatic staff within Ukraine, with some moving consular operations from Kyiv to Lviv



# Russia-Ukraine Situation Update

## Key Operational Developments:

- Ukrainian State Air Traffic Service Enterprise (UkSATSE): "The airspace over the territory of Ukraine is currently open and accessible for flight planning. Flight safety is ensured at the appropriate level in accordance with international norms and standards."
- KLM, Norwegian, British Airways reportedly avoiding Ukrainian airspace
- Several leading international commercial airlines have altered flight routings and/or timings in Ukrainian airspace regarding overflights
- Multiple leading international air carriers have reportedly stopped conducting overnight stops at airports in Ukraine, or have adjusted schedules in other ways



Osprey:Explore Data – Russia, Ukraine & Belarus



# Russia-Ukraine Situation Update

## Key Insurance Developments:

- ✦ **13 February** - SkyUp Airlines [statement](#): "On February 12, 2022, the world's largest insurance companies informed Ukrainian air carriers that in 48 hours they would stop insuring aircraft for flights in Ukrainian airspace. This decision is associated with increased risks of military invasion."
- ✦ **14 February** - Ukraine International Airlines [statement](#): "Due to the foreign policy situation, Ukraine International Airlines (UIA) has received an official notification from insurance companies to terminate the insurance of aircraft for flights in the airspace of Ukraine." On **15 February**, UIA [said](#) it had reached agreements with insurance companies and lessors.
- ✦ **15 February** - Bees Airline [said](#) that "despite the extension of insurance policies for aircraft, the allocation of funds from the reserve fund of the state budget to ensure safety in the airspace of Ukraine and the lack of a ban from the State Aviation Service of Ukraine and foreign aviation authorities", lessors required the relocation of their aircraft outside Ukraine.
- ✦ **Analyst comment:** Rerouting of civil aviation over Ukraine's FIR Dnipro (UKDV), FIR Simferopol (UKFV), FIR Lviv (UKLV), FIR Odesa (UKOV), FIR Kyiv (UKBV) and UIR Kyiv (UKBU) as well as in portions of Russia's FIR Moscow (UUWV) and FIR Rostov (URRV) is a significant concern going forward - either by regulatory action and/or changes in insurance coverage. Operators should remain prepared for a short-notice loss of access to portions or the entirety of the above FIRs in the near term.



# Russia-Ukraine Situation Update

## Regulatory Information

- ✦ US FAA NOTAM advises US-registered operators to use “extreme caution” when conducting flights in Russia’s FIR Moscow (UUWV) and FIR Rostov (URRV) within 100NM of Ukraine’s FIR Dnipro (UKDV), FIR Simferopol (UKFV/URFV) and FIR Kyiv (UKBV) (KICZ A0012/21).
- ✦ Canadian & Danish NOTAMs advise their operators to "take all potential risk into account in risk assessment and flight planning decisions when operating" in FIR Kyiv (UKBV), FIR Lviv (UKLV) and FIR Odesa (UKOV) (CZYZ G0153/22 & EKDK A0480/22).
- ✦ Airspace control issues in FIR Simferopol (UKFV/URFV) over the Black Sea represent ongoing civil aviation safety-of-flight concerns, as evidenced by advisories issued by EASA, as well as UK, Canadian, French and Danish civil aviation authorities (France AIC – A 18/21, UK AIP ENR 1.1 Section 1.4, Canada NOTAM CZYZ G0153/22, Danish NOTAM EKDK A0480/22).
- ✦ EASA, along with the US, UK, Canadian, French and now Danish civil aviation authorities, have issued advisories for FIR Dnipro (UKDV) airspace, which includes Donetsk and Luhansk provinces of eastern Ukraine.
- ✦ For full details of these notices, please access Osprey:Open via the following link: <https://open.ospreyfs.net>

# Russia-Ukraine Situation Update



Osprey scoring for the relevant Airspace Risk Areas outlined below:

- Ukraine - Donetsk & Luhansk: **EXTREME** at all altitudes
- Ukraine (non-conflict): **HIGH** at all altitudes (up from MODERATE on 11 Feb)
- FIR Simferopol (UKFV): **HIGH** at all altitudes (up from MODERATE on 11 Feb)
- Russian Border: **HIGH** at all altitudes (up from MODERATE on 11 Feb)
- Belarus: **HIGH** at all altitudes (up from MODERATE on 11 Feb)

Osprey scoring for the relevant Airports outlined below:

- All Russian airports remain at **MODERATE** risk
- All Ukraine airports now at **HIGH** risk (Kyiv & Odessa up from MODERATE on 11 Feb)



# Russia-Ukraine Situation Update

- Visualisations & Mapping
- Osprey System Data Analytics



# Russia-Ukraine Situation Update

## Key military developments - Russia

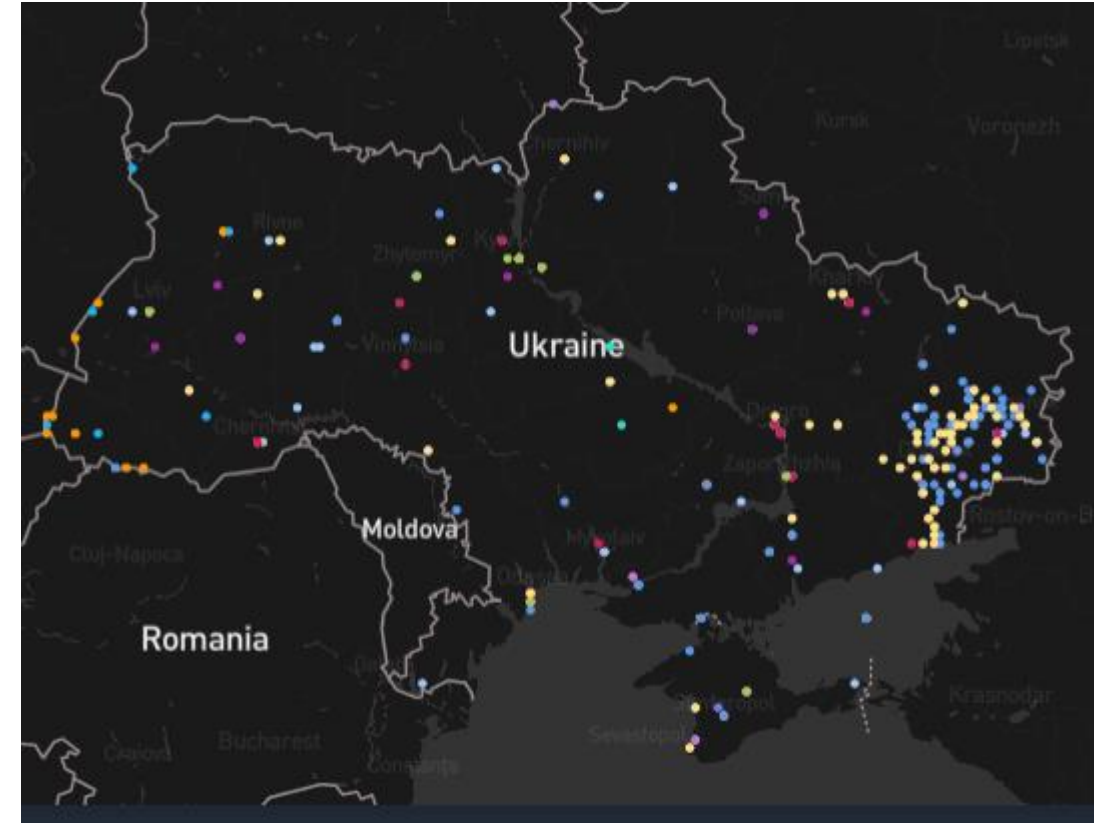
- Russian exercises in Belarus are set for 9-21 February
  - S-400 conventional surface-to-air missile (SAM) systems deployed
  - Su-35 fighter jet & Su-25 combat aircraft deployed
  - Iskander short-range ballistic missiles (SRBMs) deployed
- Russian military nuclear forces exercise expected in February
- Russian Navy exercise in the Black Sea to run through 19 February
  - Over 150,000 forces deployed in areas near Ukraine, more en route
  - Naval assets with Kalibr cruise missiles deployed in Black Sea
  - Increased transport aircraft activity in past two weeks
  - New military helicopter & Iskander deployments near Ukraine
  - Additional S-400 & S-300V deployed by Russia near Ukraine
  - Bastion-P & Bal-E coastal defence missiles deployed to Crimea
  - Multiple launch rocket systems, heavy artillery & mortar units deployed

*Analyst comment: Osprey assesses the above to represent the largest mass mobilisation of military forces in the history of the Russian Federation. The Russian military has the ability to conduct a full or partial invasion of Ukraine via multiple avenues of approach as well as the capacity to carry out long-range fires via offensive strike assets without entering Ukrainian territory. Such activity could happen at any point and with little to no warning within the next six weeks.*

# Russia-Ukraine Situation Update

## Key military developments - Ukraine

- Several NATO countries have provided defensive weapons to Ukraine
  - Anti-tank guided missiles (ATGMs)
  - Man-portable air-defence systems (MANPADS)
  - Artillery & mortar ammunition
  - Drones
- Ukrainian military air defences deployed in Donetsk & Luhansk province
- Ongoing Ukrainian military exercises to run through 20 February
- Significant increase in ISR air patrols over the Black Sea over past 3 months

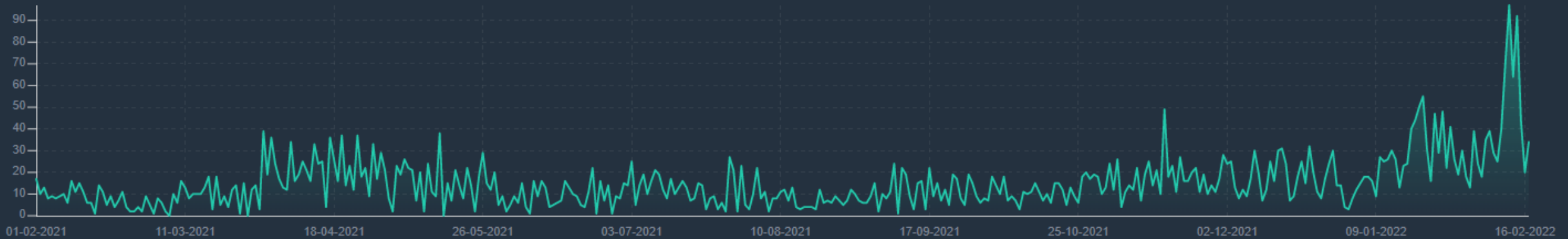


Osprey:Explore Data - Ukraine



# Russia-Ukraine Situation Update

## Ukraine: Conventional Military & Conflict Zone Activity

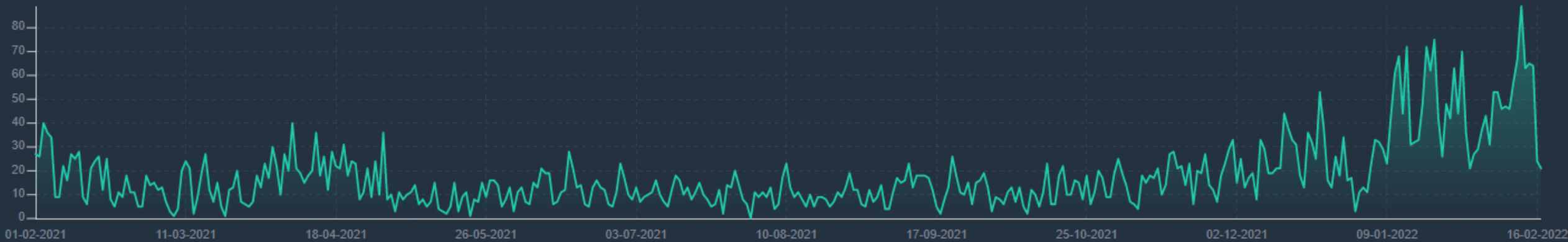


The above graph shows conventional military activity within Ukraine over the past 12 months. The data shows that there has been a spike in the past week that indicates unprecedented levels of activity.



# Russia-Ukraine Situation Update

## Russia: Conventional Military Activity

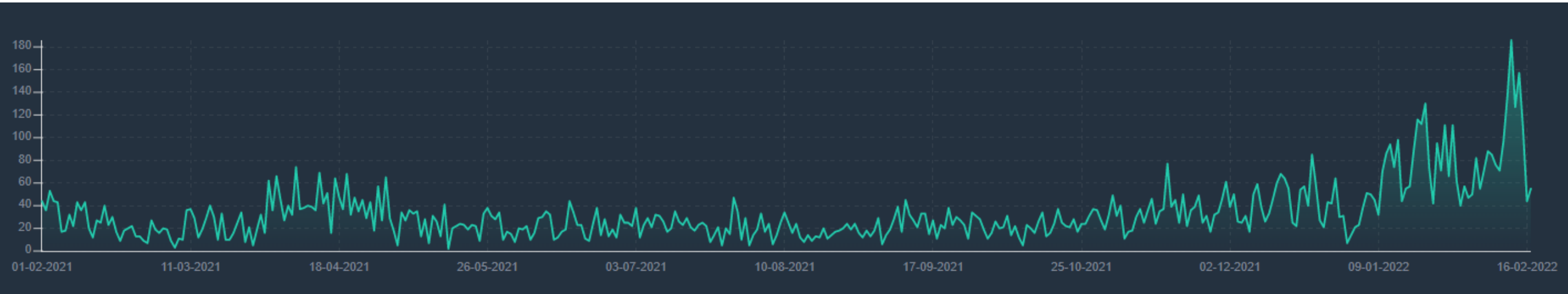


The above graph shows conventional military activity within Russia over the past 12 months. The data shows that there has been a trend in the past six weeks that indicates an escalation to unprecedented levels.



# Russia-Ukraine Situation Update

## Russia-Ukraine: Conventional Military Activity



The above graph shows conventional military activity within Russia and Ukraine over the past 12 months. The data shows that there has been a spike in the past week that indicates a severely deteriorating situation.

# Russia-Ukraine Situation Update

Assessment, Indicators & Takeaways



# Russia-Ukraine Situation Update

## Osprey Assessment

*The recent security talks between Russia, Ukraine and Western governments have failed to alleviate tensions and though Osprey views the diplomatic engagements to be a positive step aimed at de-escalating the situation, they have thus far been fruitless. The US president stated on 15 December that 150,000 Russian military forces are deployed around the Ukrainian border. While Russia claimed to have removed some forces from Crimea on 15-17 February, the US, UK and NATO all indicated that there was no evidence the Russian military had begun withdrawing from the Ukrainian border. Western governments in the past week have used varying degrees of descriptive language indicating a near-term Russian military attack on Ukraine was "imminent", "likely" and/or a "distinct possibility".*

*Based on several Western governments advising against travel to Ukraine, the escalating number/type of Russian military offensive forces deployed, increased transport and combat air asset movements, and the stationing of advanced air-defence systems in all areas along the Ukrainian border, Osprey assesses that a full or partial invasion of Ukraine by Russia - via the Voronezh route, via Crimea and the Black Sea (with the possible use of Transnistria as well) and/or through Belarus - to be likely in the first quarter of 2022.*

*Russia may pursue lower-cost options such as providing additional support to pro-Russian militia forces in eastern Ukraine to inflame the conflict in Donetsk and Luhansk during the first three months of the year. Osprey assesses such actions would be coupled with covert Russian efforts to destabilise the Ukrainian provinces of Dnipropetrovsk, Kherson and Zaporizhzhia as well as the Sea of Azov area. In addition, limited Russian military cross-border kinetic strikes against Ukrainian military forces and/or critical infrastructure, without Russian military ground or air units crossing into the physical territory of Ukraine, remain a credible outlier scenario in the first quarter of 2022.*





# Russia-Ukraine Situation Update

## Key Indicators of Escalation

- Near complete breakdown of diplomatic efforts
- Increase in ceasefire violations in Donetsk & Luhansk
- Widespread telecommunications disruption an/or cyber attacks
- Additional emptying of staging areas confirmed via commercial IMINT
- Further deployment of naval vessel to Black Sea and/or Sea of Azov
- Spike in incidents of GPS jamming and/or electromagnetic interference (EMI)



# Russia-Ukraine Situation Update

## Key Takeaways

- ✦ Donetsk-Luhansk area of Ukraine remains an active conflict zone with NOTAMs in place prohibiting flight operations
- ✦ Both Russia & Ukraine claim control of FIR Simferopol (UKFV/URFV) airspace over the Black Sea
- ✦ Both Russia & NATO are conducting increased levels of military air patrols over the Black Sea
- ✦ GPS jamming & other forms of EMI remain present in the region, including the Russia-Ukraine border and Black Sea
- ✦ Possible short-notice issuance of regulatory NOTAMs, circulars, publications, restrictions and/or bulletins
- ✦ Potential change in insurance coverage and/or access to such services for flights to/over Ukraine



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