



INFRASTRUCTURE CAPACITY AND EFFICIENCY

AFI Aviation Symposium, Nairobi, Kenya 22 August 2023

AGENDA



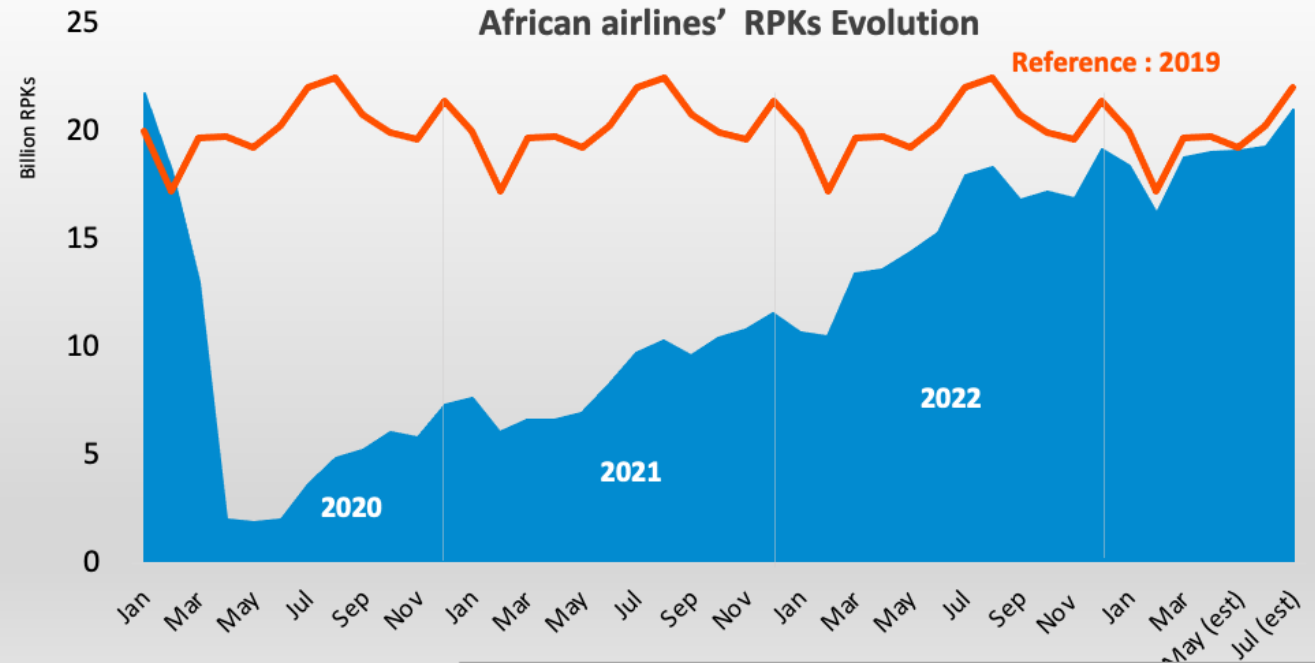
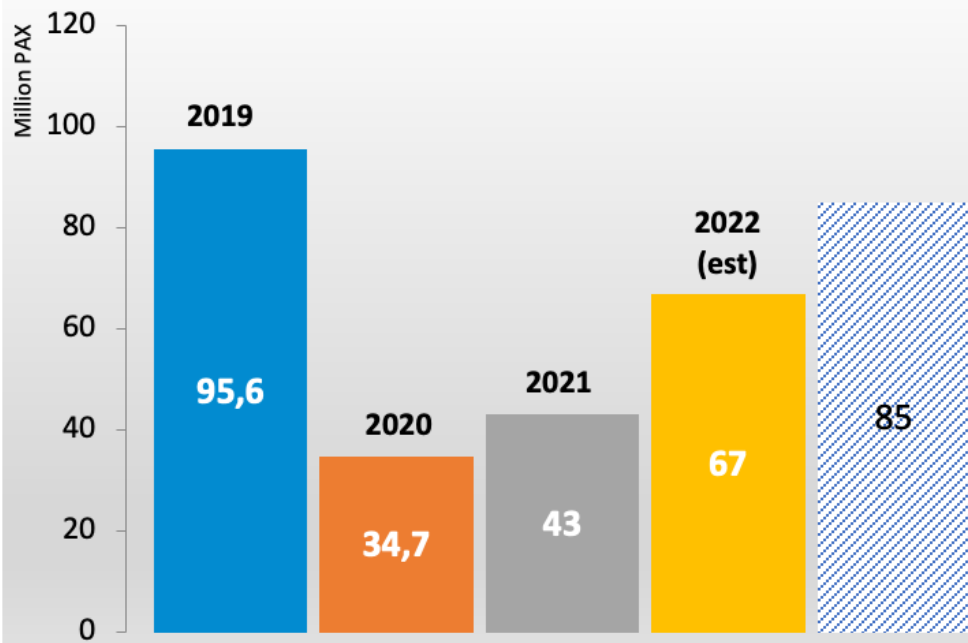
I. Infrastructure Capacity

II. Infrastructure Efficiency

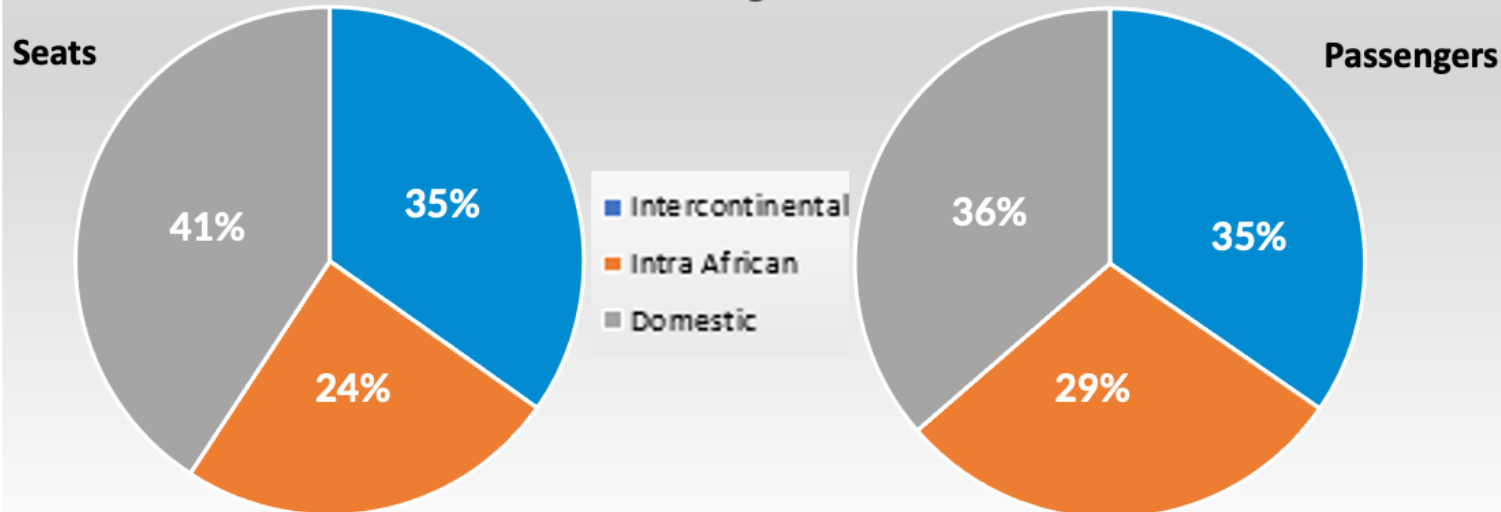
III. Collaborative Approach to
Sustain the Industry



1. Capacity and traffic evolution



Seats and Passengers distribution



- **85 million PAX** in 2023 (AFRAA estimations).
- Traffic is expected to reach **95.2%** of the 2019 levels in **July 2023**.
- In May 2023 (Final adjusted data) :
 - ✓ Domestic traffic represented **36% of the passengers carried**.
 - ✓ Intra-African passengers carried represented **29%**
 - ✓ Intercontinental traffic was **35%**



I. Infrastructure Capacity?

How challenged is Africa ANS Infrastructure to lodge even a 5th of the European number of aircraft movements in the African landmass three times bigger than Europe?



I. Infrastructure Challenges

Air Navigation Services:

- AFI Air Traffic Service (ATS) Incident Analysis Group (AIAG) continues to monitor ATS incidents and assess infrastructure safety in Africa. ATS data continue to support RVSM implementation.

Airport Services

- The operational setups in some airports fall short of the required or expected facilities that would enable them to provide a comfortable passenger travel experience.

II. Infrastructure Efficiency Strategy: Making Air Services Affordable

Africa's high-cost environment causes low productivity

Reduce Costs & Prices

Generate Revenues

Conquer Africa's Market



THE 5 PROJECTS to Reduce Costs and Grow Traffic Infrastructure Efficiency



1. Taxes (**Fuel** and customs)



2. High Taxes and **Charges**



3. **Navigation – Free Routing Airspace (FRA)**



4. SAATM



5. Partnerships - Airlines and Tourism Bodies
to improve intra-African Tourism

III. Collaborative Approach to Sustain the Industry

- Collaborative Decision-Making (CDM) to:
 - Process infrastructure development for air navigation services and airports and
 - Enhance the passenger travel experience while containing the inflation of operating costs of airports, ANSPs, and airlines.
- Select and implement relevant ASBU modules suitable to:
 - Ensuring seamless air traffic management in Africa based on traffic flows.
- Innovative technologies in air navigation services or airport operations:
 - Carry out a safety assessment to identify any safety risks and apply the required mitigation solutions;
 - Undertake a Cost Benefit Analysis (CBA) to confirm that the new technology solutions do not come with an excessive financial burden for the users and;
 - Enhance productivity to induce the reduction of charges.

Conclusion

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- African ANS and Airport infrastructure capacity has lessened pressure
 - Infrastructure Efficiency must improve to sustain the industry development
 - Together, we can improve the aviation infrastructure
 - Collaborative Approach to Sustain the Industry through
 - CDM among States, ANSPs, Airports to enhance travel experience and support the development of African economies.
 - Selection and implementation of relevant ASBU module for seamless ANS.
 - Implementation of innovative technologies enhancing productivity across the entire aviation industry to make air services to African middle-class citizens.

**THANK
YOU**



Better Skies for Africa