

FRA Trial Project

Presented by AFRAA on behalf of AAIG

PBN ROUTE LABORATORY Gigiri, Nairobi, Kenya
22 to 26 May 2023

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AFRICAN AVIATION INDUSTRY GROUP



AAIG MEMBERSHIP

Airlines

- AFRAA
- IATA
- AASA

Air Navigation Service Providers

- CANSO – AFRICA

Airports

- ACI – AFRICA

OEM

- BOEING

Observers

- AFCAC
- ICAO
- AfDB



AAIG OBJECTIVES

- Promote the full implementation of the Single African Air Transport Market (SAATM);
- Advocate for the reduction of Taxes and Charges to generate more demand and connectivity;
- Advocate for enhancing African airports' non-aeronautical revenues.
- Coordinate and harmonize state and industry actions on African regional priorities as agreed by the AAIG from time to time;
- Make recommendations that effectively promote and accelerate the safe, sustainable and profitable growth of aviation in Africa;
- Develop African commercial aviation to support Africa's economic sustainability and prosperity; and
- Provide information to the public on the aviation industry's key aero-political issues through the most appropriate channels;
- Advocate for environmental sustainability through a reduction in CO2 emissions and noise reduction
- Encourage research and development into technology to improve the automation of air traffic service in the region

FOUR-DECADE MARGINALIZATION TREND

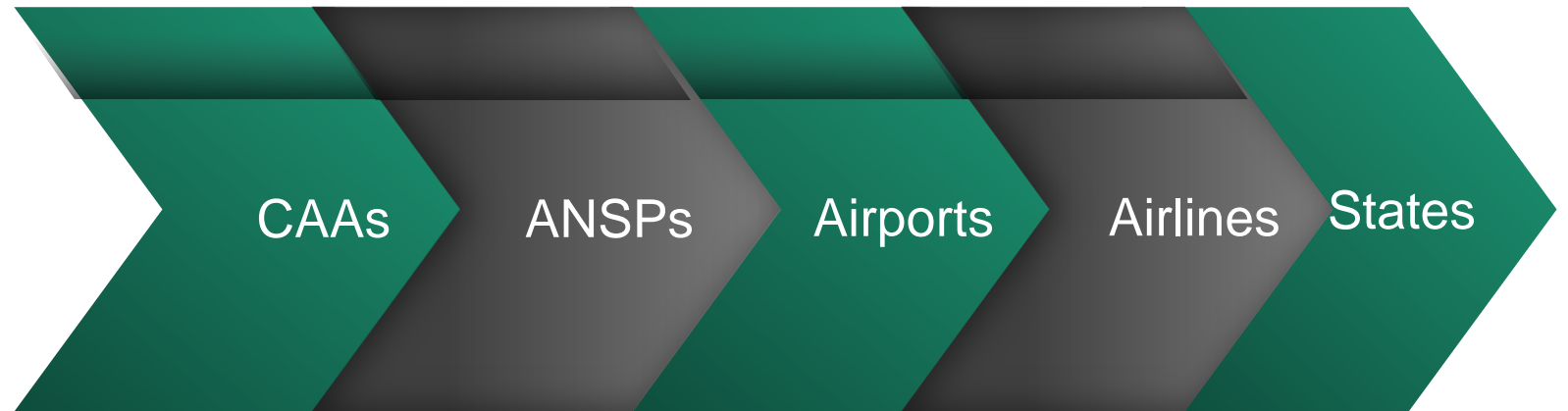
For Four Decades, No YD Implementation

- From the 1980s to 2019, the market share plummeted from 3.5% to 1.9%
- African airlines' contribution dropped from 45% to 20%
- In 2019, foreign carriers:
 - Provided air services on a third of intra-Africa via hubs outside Africa
 - Serviced 8 out of the top 10 lucrative African routes
 - Yet, eligible airlines are denied intra-Africa 5th freedom, even 3rd and 4th at times in SAATM States.

Wake-up calls to stakeholders to seek sustainable solutions to revamp Aviation
The PIP cluster initiative is great for triggering SAATM implementation in Africa.

MARGINALIZATION ROOT CAUSES

- Supply Chain High Costs
- High Air Transport service Fares and Rates
- Fares not affordable



REDUCE COSTS, GAIN PRODUCTIVITY ALONG THE SUPPLY CHAIN, AND MAKE IT AFFORDABLE TO AFRICAN CITIZENS



THE OUTCOME OF THE AIR TRANSPORT SUSTAINABILITY LABORATORY

DEVELOPMENT of TRADE, AIR TRANSPORT, and TOURISM Sectors in a VIRTUOUS CYCLE

Trading affordable consumable products

- Increases connectivity requirements and
- Supports air transport

Providing affordable airfares

- Blossoms air traffic demand and
- Supports trade and tourism

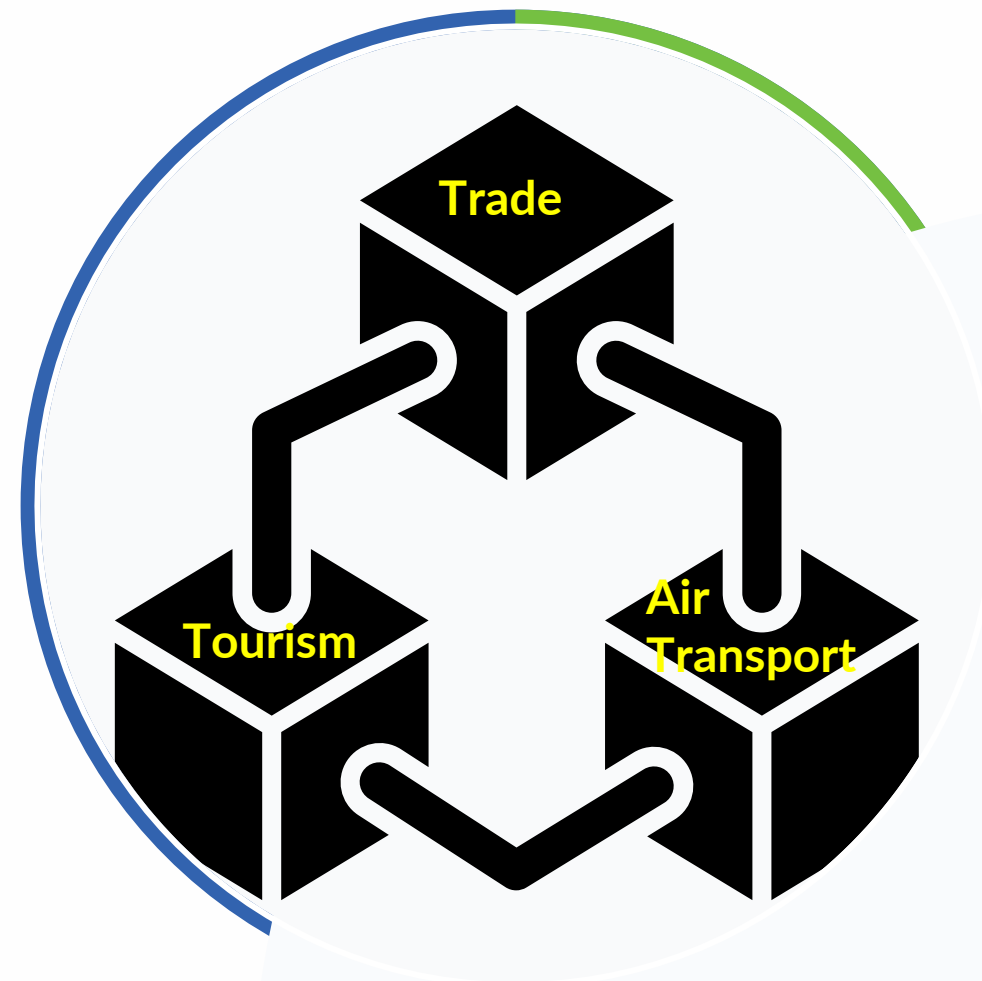
Trading affordable hospitality

- Increases consumable demands;
- Supports trade and air transport

AfCFTA and SAATM engage trade, tourism, and air transport in a virtuous cycle.

Together, the three sectors contribute to increasing Africa's Middle-class.

Conquering intra-Africa improves these industries' competitiveness in global markets.



Priority Projects to Make Air Services Affordable






Reduce Prices

Reduce Costs

Generate Revenues

Conquer Africa's Market

**THE 5
PROJECTS
to Reduce
Costs and
Grow Traffic**

-  **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**



THE FRA TRIAL PROJECT





Proposed City Pairs for FRA Trials

Kenya Airways required City Pairs

Nairobi – Dzaodzi

Nairobi Abidjan

Nairobi Cape Town

Ethiopian Airlines required City Pairs

Addis Ababa – Abidjan; Addis Ababa – Niamey

Addis Ababa – Kinshasa; Addis Ababa –
Johannesburg & Addis Ababa - Cairo

KQ Routings

NBOABJ01

HKJK/DCT NV UL433 NAKAT DCT EN116 DCT
EPVIL DCT NULAG DCT XESEL DCT RAPIN DCT
02N020E DCT SERAL DCT AMPIL DCT 04N008E
DCT
LIREX DCT OPEMU DCT MIMTI UB600 ONESI DCT

ABJNBO03

DIAP/DCT ONESI/UB600 MIMTI/DCT OPEMU/DCT
LIREX/DCT N0400.0E00800.0/DCT AMPIL/DCT
SERAL/DCT N0200.0E02000.0/DCT RAPIN/DCT
XESEL/DCT NULAG/DCT EPVIL/DCT EN116/DCT
NAKAT/NAKA2P HKJK

NBOCPT01

HKJK/DCT NV UM315 EVATO UP312 LOSIN DCT
SINGI UP312 MB UR779 GESAT DCT 12S032E DCT
IMLUP DCT AVIVA DCT IXEMI DCT 21S027E DCT
UTVIN DCT 26S024E DCT SSV DCT 31S021E DCT
ERDAS ERDAS1A

CPTNBO01

FACT/KODE1A KODES/DCT S3100.0E02100.0/DCT
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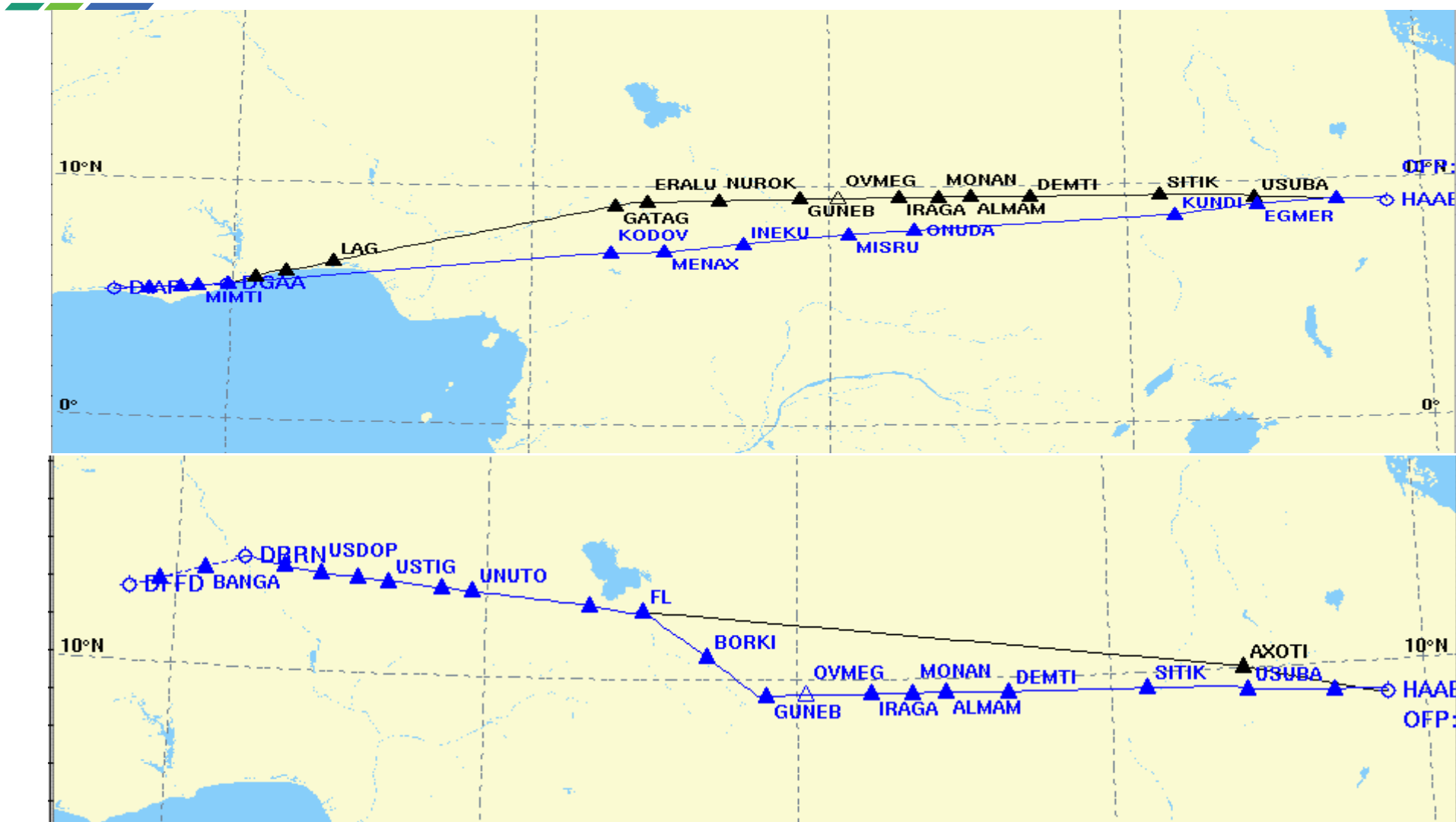
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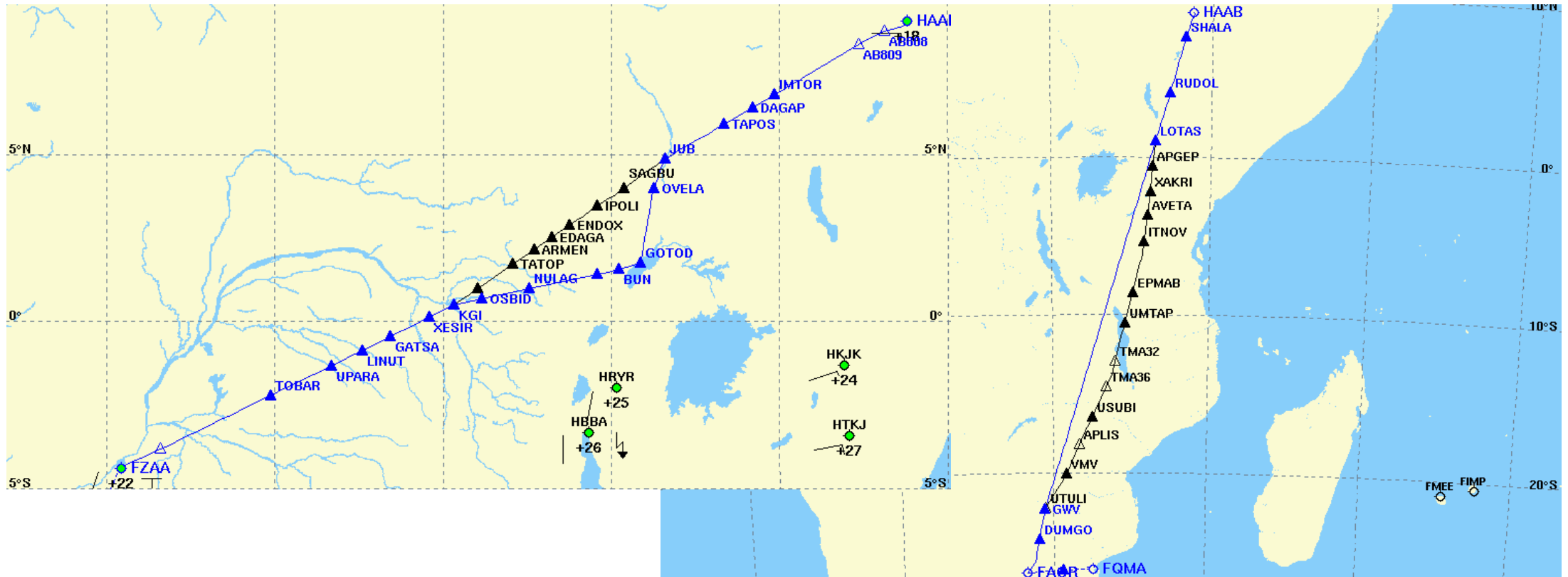
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FMCZ/DCT VOHID/UG661 TABNO/DCT
S0800.0E04200.0/DCT IMROD/DCT GADLA/DCT
GABSO/GABS2P HKJK

Addis Ababa – Abidjan Addis Ababa - Niamey



Addis Ababa – Kinshasa Addis Ababa - Johannesburg



Addis Ababa – Cairo



Positive Impacts on Flight Operations and the Environment

Annually, FRA implementation of these routes :

- *Prevents burning **3,200 metric tons of fuel**,*
- *Avoids emitting **10,100 metric tons of CO₂**, and*
- *Yields savings of **US\$ 2,784,000**.*



SAFELY TOWARD THE PROJECT IMPLEMENTATION



Toward the Implementation of Trials

Roadmap

Regional PMT Target Date

1. States' various preparedness status
2. 2025 targeted in the regional roadmap.

Safely Toward the Implementation of Trials

Learning from
Latin America
and
Seizing LATAM
CADENA Offer

Project Kick-off Workshop

1. To transmit practical skill and competency to relevant African stakeholders.
2. To go through practical cases of implementation.
3. To ensure that AFI stakeholders master CADENA Methodology.

Pragmatic Safe Implementation of Trials

Learning from Latin America and Seizing LATAM CADENA Offer

1. Implement the FRA Trials step-by-step.
2. Keep the AFI FRA PMT abreast of progress, achievements, and lessons learned.



CONCLUSION



Conclusion

Conclusion and Action by Meeting

- ***The Meeting is invited to:***
 - ***Record the FRA trial routes in the regional route network, and***
 - ***Urge relevant stakeholders to participate in the planned dedicated workshop on CADENA toward implementing the FRA trials in AFI.***

THANK YOU



Care of AFRAA

Better Skies for Africa

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