



MEETING ON THE SUSTAINABLE DEVELOPMENT OF AIR TRANSPORT IN AFRICA

Antananarivo, Madagascar, 25 – 27 March 2015

REPORT

Site and duration of the meeting

1. The Meeting on the Sustainable Development of Air Transport in Africa, organized by the International Civil Aviation Organization (ICAO) in cooperation with the Civil Aviation Authority of Madagascar (ACM) and the Ministry of Tourism, Transport and Meteorology (MTTM), was convened at the Hotel Carlton in Antananarivo, Madagascar, at 1000 hours on 25 March 2015.
2. Mr. Jean Ravelonarivo, Premier Ministre, Madagascar opened the meeting in the presence of Dr. Olumuyiwa Benard Aliu, President of the Council of ICAO and Mr. Abdulai Alhassan, President, African Civil Aviation Commission (AFCAC), Mr. Marcio Favilla L. de Paula, Executive Director, World Tourism Organization (UNWTO), Dr. Elham M. A. Ibrahim, Commissioner, Infrastructure and Energy, African Union Commission (AUC), Ms. Fatma Samoura, Director Resident Coordinator, United Nations. The meeting completed its work on 27 March 2015.

Attendance

3. The meeting was attended by 297 participants from 34 States, as indicated in **Appendix B**: Angola, Benin, Botswana, Burkina Faso, Burundi, Cameroon Cape Verde, Chad, China, Comoros, Congo, Cote d'Ivoire, Democratic Republic of the Congo, France, Gambia, Ghana, Guinea, Japan, Kenya, Malaysia, Mauritius, Niger, Rwanda, Sao Tome & Principe, Senegal, Seychelles, Sierra Leone, Somalia, Sudan, Swaziland, Togo, Tunisia, Uganda, and United Republic of Tanzania. Regional and international organizations included: African Civil Aviation Commission (AFCAC), African Union Commission, Airlines Association of Southern Africa (AASA), Airports Council International (ACI), the Agency for Air Navigation Safety in Africa and Madagascar (ASECNA), Association Internationale des Transporteurs Aériens Francophones (ATAF), African Airlines Association (AFRAA), Civil Air Navigation Services Organisation (CANSO), Economic community of West African States (ECOWAS), European Union (EU), International Air Transport Association IATA, International Federation of Freight Forwarders Associations (FIATA), FIR Roberts, International Coordinating Council of Aerospace Industries Associations (ICCAIA), International Monetary Fund (IMF), World Tourism Organization (UNWTO) and over 60 participants from private entities also participated.

Officers and Secretariat

4. Mr. James Andrianalisoa, Director General, National Civil Aviation Administration (NCAA), Madagascar, was elected Chairman of the meeting.



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5. Mr. Boubacar Djibo, Director of the Air Transport Bureau of ICAO, served as Secretary of the Meeting. Mr. Frédéric Malaud, Mr. Antonin Combes and Ms. Rowena Sison acted as Assistant Secretaries. Discussions during the meeting were conducted in French and English.

Outcome of the meeting

6. The meeting resulted in the adoption of the Declaration on the Sustainable Development of Air Transport in Africa: Key Milestones (**Appendix A**).

7. The President of the ICAO Council, Dr. Aliu, and all participants expressed sincere gratitude to the Government of Madagascar, to the Director General and all staff of the CAM for the excellent preparatory work and fine conditions in which the meeting was conducted.

8. Closing remarks were delivered by Dr. Elham M. A. Ibrahim, Commissioner, Infrastructure and Energy, African Union Commission (AUC), Ms. Mercy Awori, Representative of Kenya on the Council of ICAO and Representative of the Eastern African Region, Mr. Raphael Bokango, Representative of Tanzania and Coordinator of the African Group at ICAO, Dr. Olumuyiwa Benard Aliu, President of the Council, International Civil Aviation Organization (ICAO), and Mr. Ulrich Andriantiana, Minister of Tourism, Transport and Meteorology, Madagascar.

9. On behalf of the participants Col. Dokisime Gnama Latta, Chairman, Air Cargo Development in Africa Initiative & Directeur Général de l'Aviation Civile, ANAC Togo read a vote of thanks on behalf of participants.



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Appendix A

Declaration on The Sustainable Development of Air Transport in Africa: Key Milestones

Air transport is a catalyst for economic growth. Air transport connects African States to regional and global markets which enhance travel and tourism, and the movement of goods and other vital business activities. It represents an essential lifeline for Landlocked Developing Countries (LLDCs) and Small Island Developing States (SIDS). Increased connectivity provides African countries with quick and efficient access to destinations throughout the continent and worldwide markets. Air transport and tourism are deeply interconnected drivers of economic growth and sustainable development. Today, over half of all international tourists arrive at their destination by air. Africa has been one of the fastest-growing tourism regions of the last decade. This trend is indicative of how aviation is helping to expand tourism and vice versa, and how this can foster sustainable economic development and integration on the African continent.

The Decision relating to the Implementation of the Yamoussoukro Declaration Concerning the Liberalization of Access to Air Transport Markets in Africa (YD, Nov. 1999), which was endorsed during the Assembly of Heads of African States held in Lomé, Togo, in July 2000, created the fundamental basis of Africa's strategy for the sustainability of air transport, through a harmonized air transport liberalization framework. Taking into consideration the principal features of air transportation, the African States confirmed the goal to liberalize the access to air transport market in Africa in its entirety.

Further to the adoption of the YD and in addition to efforts to address fair competition issues at national level, a number of Regional Economic Communities (RECs), sub-regional bodies, AFCAC and the African Union (AU) have contributed over the years, to the development of harmonized fair competition rules. These efforts need to be supported and their products made use of especially the African Civil Aviation Policy (AFCAP).

The need to speed up full implementation of the YD and establish a single African air transport market is considered crucial to the achievement of the long-term vision of the AU known as the AU Agenda 2063 whose main goals are to accelerate socio-economic development and integration of Africa. In that regard, the African Heads of State and Government adopted, in January 2015, a declaration and decisions expressing their resolve to ensure creation of the single air transport market in the continent by 2017. The market will be established starting with States that have already declared their solemn commitment to it and remain open to all to join once they subscribe to the endeavour. The AUC, AFCAC and the RECs in collaboration with other key stakeholders are currently finalising the operational framework of the single air transport market. This is a strategic initiative that aims at building a dynamic and sustainable air transport sector in Africa.

In order to identify regulatory and operational solutions for the sustainable development of air transport, its industry and services in Africa, ICAO has decided to convene, in cooperation with the Civil Aviation Authority of Madagascar and the Ministry of Tourism, Transport and Meteorology, the *Meeting on Sustainable Development of Air Transport in Africa, from 25 to 27 March 2015*. In



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conclusion to this Meeting, the representatives of the participating States (the “**Participants**”) have decided, supported by aviation stakeholders present, to state their common understanding of the vital importance of the contribution of air transport to economic growth in Africa. They have resolved to affirm their intent for implementation of strategic decisions taken during the said Meeting in support of the sustainable development of air transport, through the signing of this Declaration.

Areas for Improvement for the Sustainable Development of Air Transport in Africa

The Participants have identified a number of areas which demand further actions:

1. Air transport being a catalyst for economic growth, all reasonable steps are to be taken to foster air services to allow air carriers to operate freely between points anywhere in Africa and beyond, in conformity with the YD.
2. Restrictions on traffic rights, limitations on capacity in air services agreements and air carrier ownership and control rules hinder growth and stifle investment. Under a gradual and balanced liberalization of air services, regional and global air links would be expanded and connectivity would be increased. Competitiveness would improve, foreign direct investment would increase, and economic development would accelerate. Therefore, air services agreements should evolve to allow more flexibility, including in terms of capacity.
3. The air transport value chain is a combined set of interconnected parties, locations, procedures, and information exchanges that enhances air transport connectivity and increases consumers’ benefits. There is room for further improvement in the cooperation between all stakeholders in the air transport value chain.

The Way Forward

The Participants intend to optimize the benefits of air transport through the following initiatives:

1. High priority should be given by States’ policymakers to implement the regulatory framework of the YD encouraging air transport development as part of broader aviation development and economic growth policy, coordinated across national borders in convergence with the ICAO worldwide framework and YD.
2. Further liberalization of air transport services should be promoted and States should be encouraged to revise their air services agreements to align them with YD.
3. Cooperation should be promoted between different units of the air transport value chain within States and on the international arena and cooperation fostered with partner organizations: World Tourism Organization (UNWTO), International Air Transport Association (IATA), Airports Council International (ACI), African Airlines Association (AFRAA), African Civil Aviation Commission (AFCAC), the African Union Commission (AUC) and the Airlines Association of Southern Africa (AASA).



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| <p>4. The importance of protecting the interests of consumers including in Africa is universally supported. However, the effectiveness of regulatory responses adopted by States to protect air transport users, will benefit from increased convergence and compatibility. Considering the large impacts of massive air service disruptions on passengers, as well as on airline and airport operators, it is necessary to develop mechanisms to minimize the negative impacts of such disruptions in air transport services.</p> <p>5. Fair competition is an important general principle in the operation of international air services, as recognized by the Chicago Convention. There is a need for States to give due consideration to the concerns of other States in the application of national or regional competition laws and policies, as well as a need for cooperation among competition authorities.</p> <p>6. Security and facilitation of air transport need to go hand in hand. All parties have a shared responsibility to ensure that passengers can travel safely and securely. At the same time the traffic flow should not be restricted by the lack of effective implementation of the YD. Visa facilitation should be supported and addressed by the Policy Organs of AU.</p> | <p>4. States should support the efforts of ICAO in the development of policy guidance on consumer protection and foster the adoption and implementation of ICAO's core principles on consumer protection when finally adopted as ICAO policy guidance taking into account the African Union (AU) user protection regulation. Consumer representative organizations should be associated to these efforts.</p> <p>5. Cooperation among national and/or regional competition authorities should be encouraged by States and ICAO's efforts to enhance cooperation, dialogue and the exchange of information to promote more compatible regulatory approaches toward competition in international air transport should be supported, taking into account the AU competition rules and dispute settlement mechanisms.</p> <p>6. The current security requirements in the national security programmes should be reflected; the risk management and coordination with the partner organizations working in the value chain should be implemented.
The current facilitation requirements in the framework of the ICAO TRIP strategy should be reflected. Wide use should be made of such tools as electronic visas. All kinds of non physical barriers established by African States should be eliminated throughout the Continent.</p> |
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| <p>7. The infrastructure and intermodal transport services play a vital role in political, economic and social development as well as the integration of Africa. While the access to capital remains an issue, ways exist for making projects attractive not only for government financing, but also through techniques such as public private partnerships (PPP). In this context, lending institutions should be encouraged to further support States in financing the sustainable development of air transport in Africa.</p> <p>8. Air cargo plays a vital role in the African economy, as roughly 35 per cent of global trade by value is transported by air and the success of many economies and operations depends on rapid and reliable delivery of goods. Air cargo services are therefore a major contributor to the Continent's sustainable economic development.</p> <p>9. In certain cases, air services to remote or peripheral destinations may not be commercially viable, due to low traffic volumes. With tourism recognized as a focal instrument for economic development, including in Least Developed Countries (LDCs), Small Island Developing States (SIDS) and Landlocked Developing Countries (LLDCs), mechanisms linking tourist originating countries to destinations may be beneficial.</p> <p>10. The economic benefits of further opening the aviation market, in accordance with the YD, would include the multiplier effects generated by additional air transport for economic activities and would facilitate the inclusion of isolated African countries or regions in the international market. However, if aviation charges and taxes are too high, the ability of air transport to be an economic catalyst may be compromised.</p> | <p>7. Considering the importance and role of infrastructure to support necessary development of airports and intermodal transportation infrastructure to meet the demand for air services, due consideration should be given to practices for attracting public and private capital in the most cost-effective manner.</p> <p>8. The strategic decisions taken in the framework of the Declaration on the Development of Air Cargo in Africa, adopted during the ICAO meeting hosted by Togo in Lomé, from 5 to 7 August 2014, should be supported and implemented.</p> <p>9. Due consideration should be given to the particular importance of air services for economic development in long-haul destinations and landlocked or island countries. States should consider, in a cooperative and coordinated manner, the implementation of support mechanisms such as the Essential Service and Tourism Development Route (ESTDR) scheme or other element.</p> <p>10. States should ensure that ICAO principles regarding user charges (contained in the ICAO's Policies on Charges for Airports and Air Navigation Services, Doc 9082) are followed by relevant authorities. States should also ensure that ICAO's Policies on Taxation in the Field of International Air Transport (contained in the ICAO Policies on Taxation in the Field of International Air Transport, Doc 8632) are followed by relevant authorities so as to avoid imposing</p> |
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<p>11. Africa's resolve to establish a single air transport market should be encouraged, promoted and supported in order to materialize implementation of the YD and ensure even more benefits of air transport to the continent. The focus should be on ensuring that the single market leads to the strengthening of the continent's air transport industry covering African airlines, airports, air navigation services providers, Civil Aviation Authorities and other related services. To this effect, air operators should as much as possible take advantage of the possibilities offered by cooperation agreements and global alliances.</p> <p>12. New developments in the air transport sector such as new systems, procedures, aircraft performance capabilities, renewable fuels, new supporting infrastructure and new ways to do business create the need for highly educated and skilled professionals to cope with these developments in order to sustain the economic growth in Africa.</p> <p>13. It is necessary to encourage the access of air transport operators to financing sources allowing the acquisition of more modern aircraft.</p>	<p>discriminatory taxes on international aviation which may have negative impacts on industry competitiveness and States' national economies. ICAO's efforts to develop, in collaboration with relevant industry organizations, analysis and guidance to States on the impact of taxes and other levies on air transport should be supported. To this end, a permanent consultation platform including all stakeholders of the industry should be established.</p> <p>11. States are urged to urgently join the single air transport market undertaking in order to maximise its benefits to the entire continent as early as possible. The AUC, AFCAC and the RECs should expedite the process of operationalizing the single market and work with States to remove all constraints to the building of a competitive air transport industry in Africa. The support of ICAO and other technical organisations and stakeholders is essential to ensure the African market complies with the established international aviation regulatory framework.</p> <p>12. The urgent need should be recognized to strengthen the continent's expertise, to invest in qualified personnel and promote gender diversity through training to cater to the needs created by the modernization and growing complexity of the air transport sector. Active participation should be taken in ICAO's initiatives for capacity building and full support given to the AFCAC initiative Human Resources Development Fund (HRDF) for Africa supported by ICAO and other stakeholders.</p> <p>13. States that have not done so should be urged to accede to, accept or ratify the Convention and Protocol to the Convention on International Interests in Mobile Equipment</p>
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	on Matters Specific to Aircraft Equipment signed at Cape Town on 16 November 2001 to facilitate the acquisition of modern and fuel efficient aircraft, to ensure more economical, reliable and more environmentally friendly air transport.
14. It is necessary that passengers, their heirs, air freight shippers and recipients benefit from the advantages conferred by the Convention for the Unification of Certain Rules for International Carriage by Air adopted in Montréal on 28 May 1999 (MC99).	14. Work should also be carried out by relevant bodies to stimulate faster ratifications of MC99.

The Participants, supported by air transport stakeholders, have decided to meet at two year intervals, in order to assess the progress in implementation of the actions described above and take new steps in furtherance of a sustainable development of air transport in Africa.

Adopted by the Meeting in Antananarivo, Madagascar, on 27 March 2015

James Andrianalisoa
Chairman of the Meeting



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Appendix B

List of States, International Organizations and Delegates

STATES

Angola	M. Chingango M. Rosa	Côte d'Ivoire	A. Kouame S. Coulibaly
Benin	M. Sodjahn-Mama	Dem. Rep. of the Congo	H. Muaka Mvuezolo A. Bilenge V. Futa Tshibamba
Botswana	J. Thebenala T. Monti		
Burkina Faso	M. Bouda G. Ouedraogo M. Yameogo	France	J. P. Saliniere M. Madi L. Montocchio M. Cazabat D. Dufour
Burundi	H. Emmanuel J. Kaneza D. Niyonkuru	Gambia	E. Manga
Cabo Verde	S. Fortes O. Oliveira V. Neren	Ghana	S. Wilfred
Cameroon	J. Allabira J.V. Bell	Guinea	A. Camera M. Kaba
Chad	M. Abakar	Kenya	M. Awori
China	X. He H. Jiang J. Han Y. Tao	Madagascar	U. Andriantiana F. Randriamahandry R. Rakotoarinirina I. Ravalison T. RABESON R. Rabarisoa J. Andrianalisoa A. Redia Z. Rakotonirainy V. Ravoniharoson
Comoros	B. Ahmed Bourhane M. Bahiat O. Mohamed R. Mohamed A. Sitti	Malaysia	S. Seeni Mohamed
Congo	R. Adada S. Dzota R. Batchi A. Tabawe	Mauritius	I. Pokhun
		Liberia	M. Kaba
		Niger	I. Souleymane



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Rwanda C. Mouteteli

Somalia M. Abukar

Sao Tome & Principe I. Da Costa Alamão
M. Sifiso

Sudan A. Mohamed Saeed

Swaziland D. Litchfield

Togo D.G. Latta
P. Magnourewa

Senegal M.M. Sy

Uganda C. Kasozi

Seychelles F. Marengo
G. Faure

**United
Republic Of
Tanzania** R. Bokango
J. Diu.

Sierra Leone F. Davies
A. Kamara



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International Organizations

Airports Council International (ACI)

A. Gittens
P.K. Komla

African Civil Aviation Commission (AFCAC)

A. Alhassan
B. Cire Demba
S. Gaiya
A. Adiron

African Union Commission

E. Ibrahim
A. Bakarat
D. Karanje
A Adiron

Airlines Association of Southern Africa

Chris Zweigenthal

African Airlines Association (AFRAA)

E. Chingosho

Agency for Air Navigation Safety in Africa and Madagascar (ASECNA)

N. Ouro-Loga

E. Kelewou
E. Limazie

ATAF

Dominique Patry

International Coordinating Council of Aerospace Industries Associations (ICCAIA)

C. Adjorin

Economic Community of West African States (ECOWAS)

H. Baldeh

Civil Air Navigation Services Organisation (CANSO)

Boni Debate

European Union

Daniel Dubois
S. Vanhaeverbeke



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**International Air Transport Association
(IATA)**

R. Kuuchi

P. Villard

International Monetary Fund

M. Bemanana

**International Civil Aviation Organization
(ICAO)**

O. B. Aliu

B. Djibo

P. Zo'o Minto'o

F. Malaud

A. Combes

R. Sison

N. Tsoukas

ICAO COSCAP-SADC

O. Mononga

World Tourism Organization (UNWTO)

M. Favilla Lucca De Paula



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Appendix C

Opening Address of Dr. Olumuyiwa Benard Aliu, President of the Council of ICAO

(Antananarivo, Madagascar, 25 March 2015)

Good morning everyone.

It is a pleasure and a great honour for me to address this ICAO meeting supporting the sustainable development of air transport in Africa, and to be able to meet with you all here in the lovely city of Antananarivo.

I wish to express my sincere thanks to the Civil Aviation Authority of Madagascar for hosting this event, providing such excellent meeting facilities, and for the warm welcome and hospitality it has accorded to us. My heartfelt appreciation extends to the Malagasy Government for its generous support of this timely and, I trust, engaging meeting.

Our objective here is to provide a forum for government policy makers, air transport regulators, the industry and other aviation stakeholders. Through it we shall review the latest trends and developments, discuss common challenges, and explore practical, effective and collaborative solutions to ensure the sustainable development of air transport in Africa.

We are fortunate in this regard to benefit from the presence at this meeting of top representatives from the air transport and tourism sectors, as well as from the United Nations Development Programme.

Civil aviation has a long tradition of dialogue and open-mindedness. Since the first commercial flight, international air transport has thrived on a free-flow of information and constructive cooperation. Today, it is by far the world's safest and most efficient mode of mass transportation, not to mention a powerful engine of economic and social development everywhere that aircraft fly.



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In Africa today for instance, aviation supports almost seven million jobs and 80 billion dollars in Gross Domestic Product. For Landlocked Developing Countries (LLDCs) and Small Island Developing States (SIDS) especially, it represents an essential lifeline to regional and global markets which enhance travel and tourism and other vital business activities.

Enhanced air transport connectivity is especially crucial for LLDCs, a situation particularly prevalent in Africa. It is also very relevant to the situation of Madagascar and its neighbours of the Indian Ocean. I would stress in this regard that ICAO fully supports the holistic concept of *Vanilla Islands*- an approach which is well-suited to our connectivity goals.

A major reason for aviation's continued growth and relevance in the world is that we have continuously embraced challenges as opportunities to learn, to innovate and to serve. With this in mind, I would like to set the stage for your deliberations by outlining some of the major challenges we currently face, as well as some of the solutions you may wish to consider over the next three days.

First we must do more to streamline the global air transport regulatory framework. There are more than 4,000 air services agreements today that dictate the rules and practices for air travel between countries. Bilateral agreements are still the primary tools at our disposal for the exchange of traffic rights, but some of the restrictions stemming from them can impede the orderly planning and growth of airline, airport and air navigation services operators.

Of our many challenges in this domain, the harmonization of competition frameworks and consumer protection schemes are two of the more high profile issues that we must definitely resolve.

Another formidable challenge is auspace and airport congestion. Required infrastructure in some areas has not kept pace with the rapid increase in aircraft movements, not to mention the projected doubling of traffic worldwide over the next 20 years.

And there is also the important matter of proliferating taxes and duties on aviation operations in many ICAO Member States, despite the clear evidence that such approaches bring about a negative long-term impact for both operators and the States which impose these high-tax regimes.



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Many of these challenges are tied to shortfalls in funding and coordination, especially regarding the technical, managerial and financial resources required to ensure the effective implementation of ICAO Standards and Recommended Practices (SARPs).

Some of you deal with them every day, and certainly everyone here today is committed to overcoming them as we have always done - by working together as a vibrant and unified international community.

ICAO has therefore been taking a more proactive approach by reaching out to industry, aviation stakeholders and applicable international organizations to create a more favourable environment for the economic development of air transport.

Recent initiatives undertaken with the World Tourism Organization (WTO) and the World Customs Organization (WCO) are helping us to align our priorities and programmes and improve air transport connectivity in ways which will definitely be of benefit to African States.

Another step forward has been our establishment of a multi-disciplinary working group to explore solutions for the funding and financing of regulatory government oversight functions, aviation infrastructure development, and implementing the ICAO Aviation System Block Upgrades, or ASBUs.

And one very important step we have taken is through the *No Country Left Behind* campaign recently established by the ICAO Council.

The fundamental aim of *No Country Left Behind* is to better identify and coordinate the assistance and support which is so essential to the harmonized global implementation of ICAO Standards, especially in developing States.

I would add that while this is a Council initiative, it is also a very important personal priority for me that ICAO gets better at providing States what they need most from us. In this regard



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please let me assure you that ICAO will continue to ensure effective implementation of its various initiatives to assist African States, including for:

- The Comprehensive Regional Implementation Plan for Aviation Safety in Africa (AFI Plan);
- The AFI Aviation Security and Facilitation Initiative (AFI SECFAL);
- And the Human Resources Development Fund (HDRF) for training and capacity-building of Africa's skilled and management-level aviation personnel.

ICAO also assures its support for the full implementation of the Yamoussoukro Declaration and establishment of a single air transport market in Africa, consistent with the African Union's Agenda 2063.

In closing today, ladies and gentlemen, let me please take this opportunity to encourage your States to attend and benefit from our next ICAN event, which will be hosted by Turkey later this year from 19 to 23 October.

I wish you all a very successful conference, and I look forward to meeting many of you over the coming days.

— END —