



# Improving Connectivity in ECOWAS

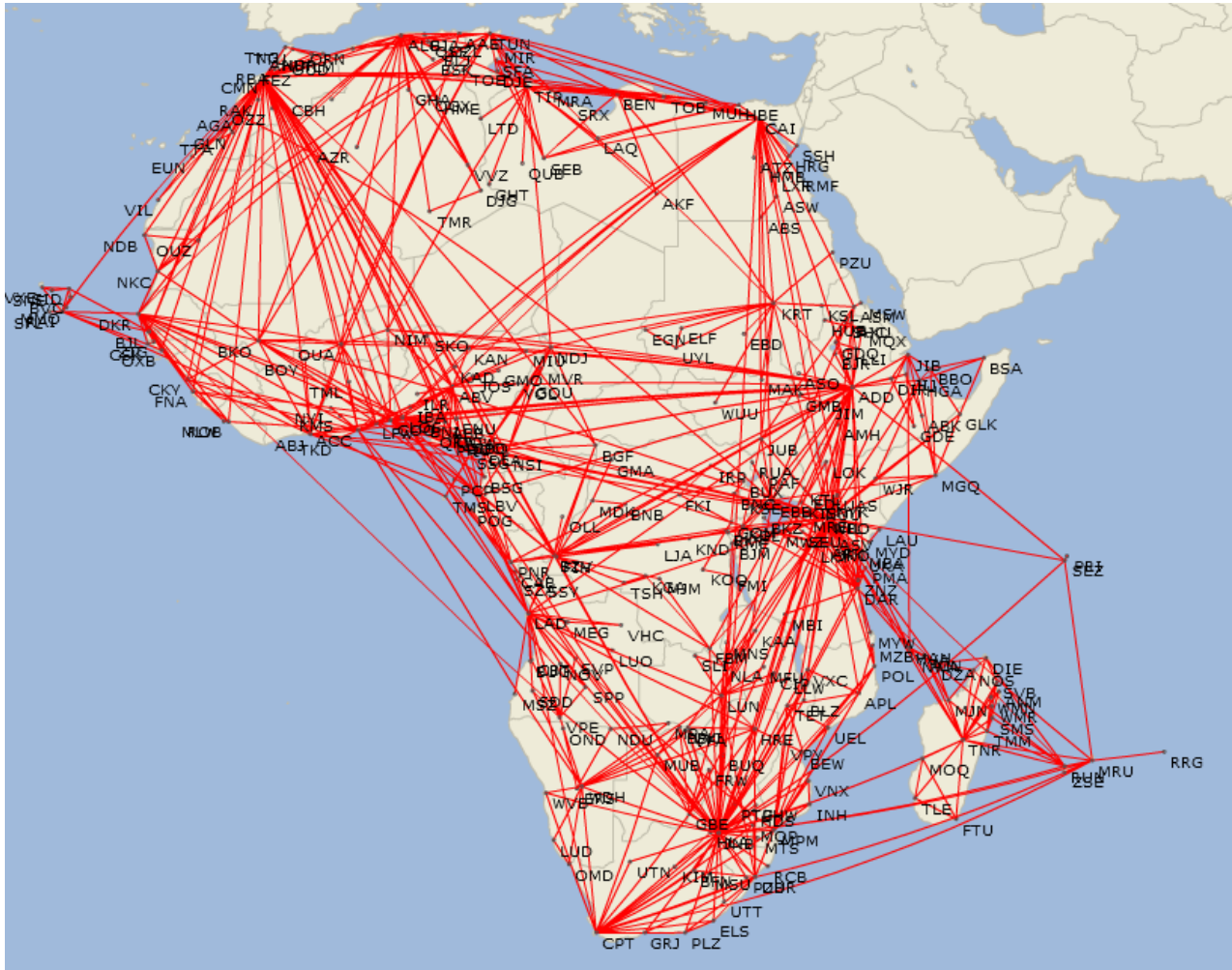
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**IATA Area Manager, South West Africa**

Our mission is to represent, lead and serve the airline industry. 

# Overview of the Current Situation



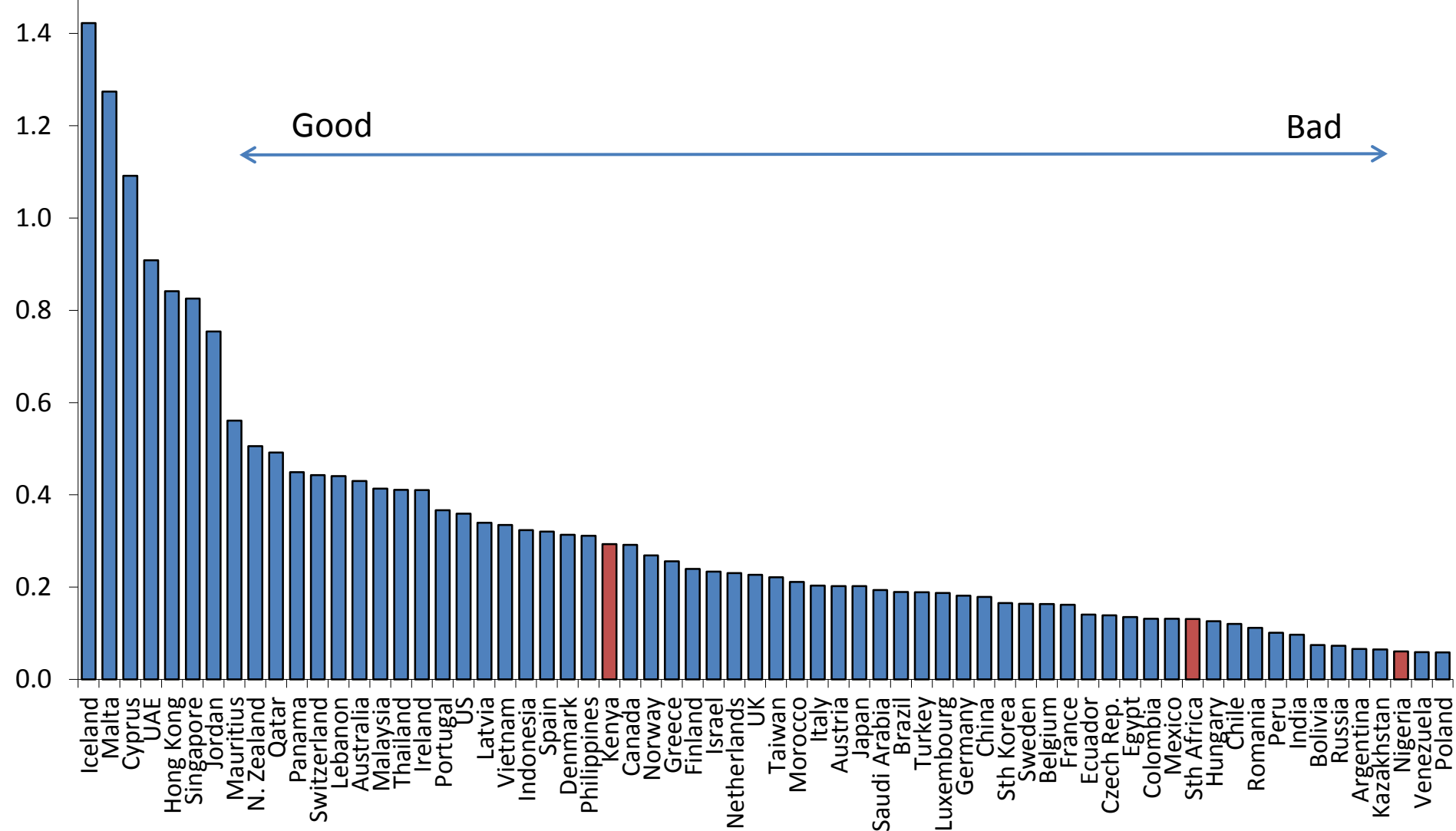
# Connectivity: Huge potential for Africa



Source: SRS Analyser, non-stop connections, June 2014

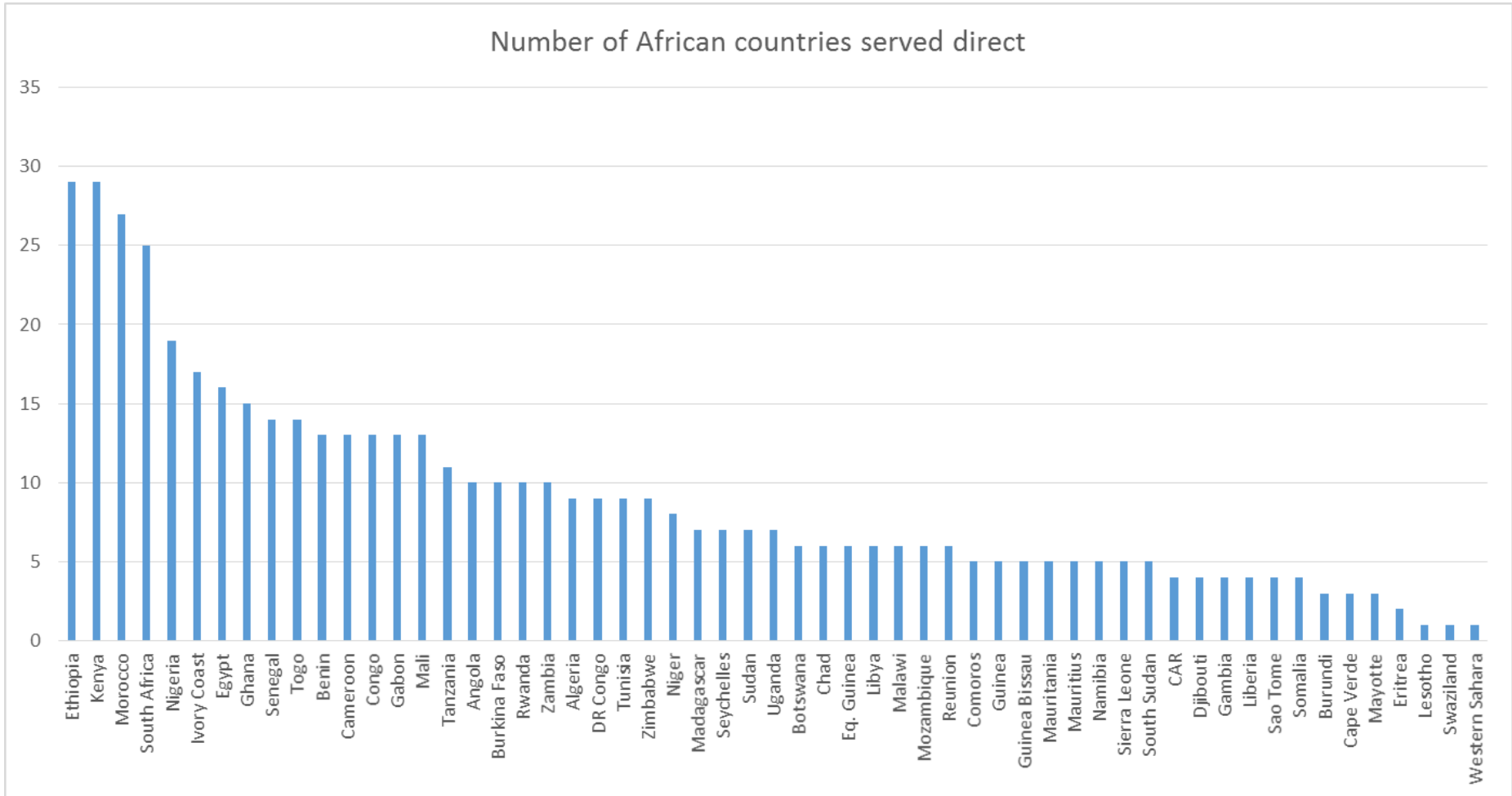
# Connectivity could be improved...

Connectivity per \$billion of GDP (PPP), 2012



Source: IATA

# Only Ethiopia and Kenya have direct connections to more than half of the other countries in Africa



Source: SRS Analyser, IATA  
Economics

# Moving forward



# FURTHER IMPROVEMENT OF THE REGULATORY ENVIRONMENT IN THE ECOWAS

- ✓ Further liberalization of market access
- ✓ Reduction of excessive Protection of national / flag carriers
- ✓ Speedy harmonization of BASA to reflect YD provisions



# Building collaboration within the industry





# REGIONAL COALITION FOR CONNECTIVITY

✓ ECOWAS

✓ AFCAC

✓ IATA

✓ AFRAA

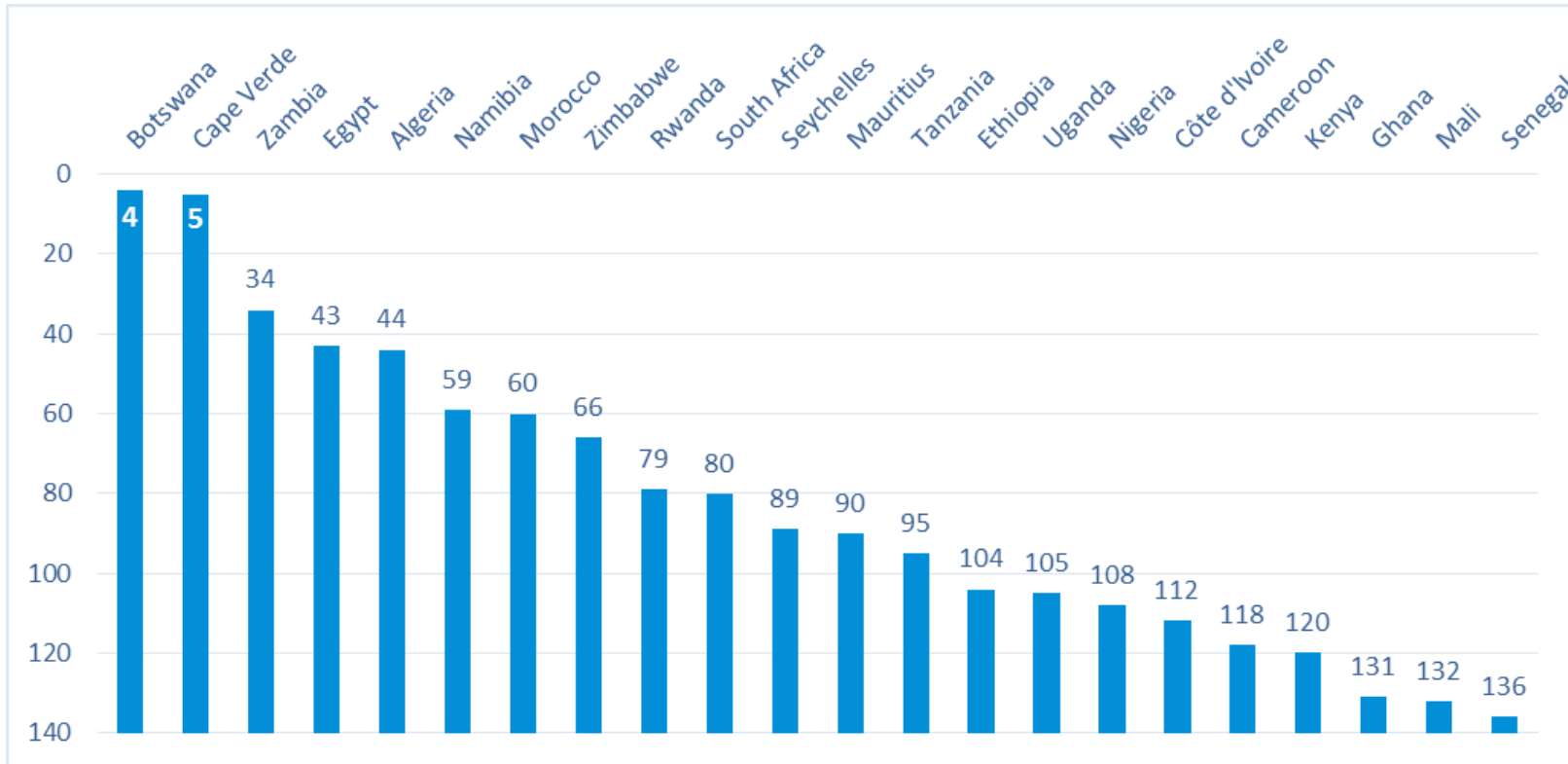


# IMPROVING COMPETITIVENESS OF ECOWAS DESTINATIONS



# Cost competitiveness is a major challenge

Relative cost of access (ticket taxes and airport charges) to international air transport services



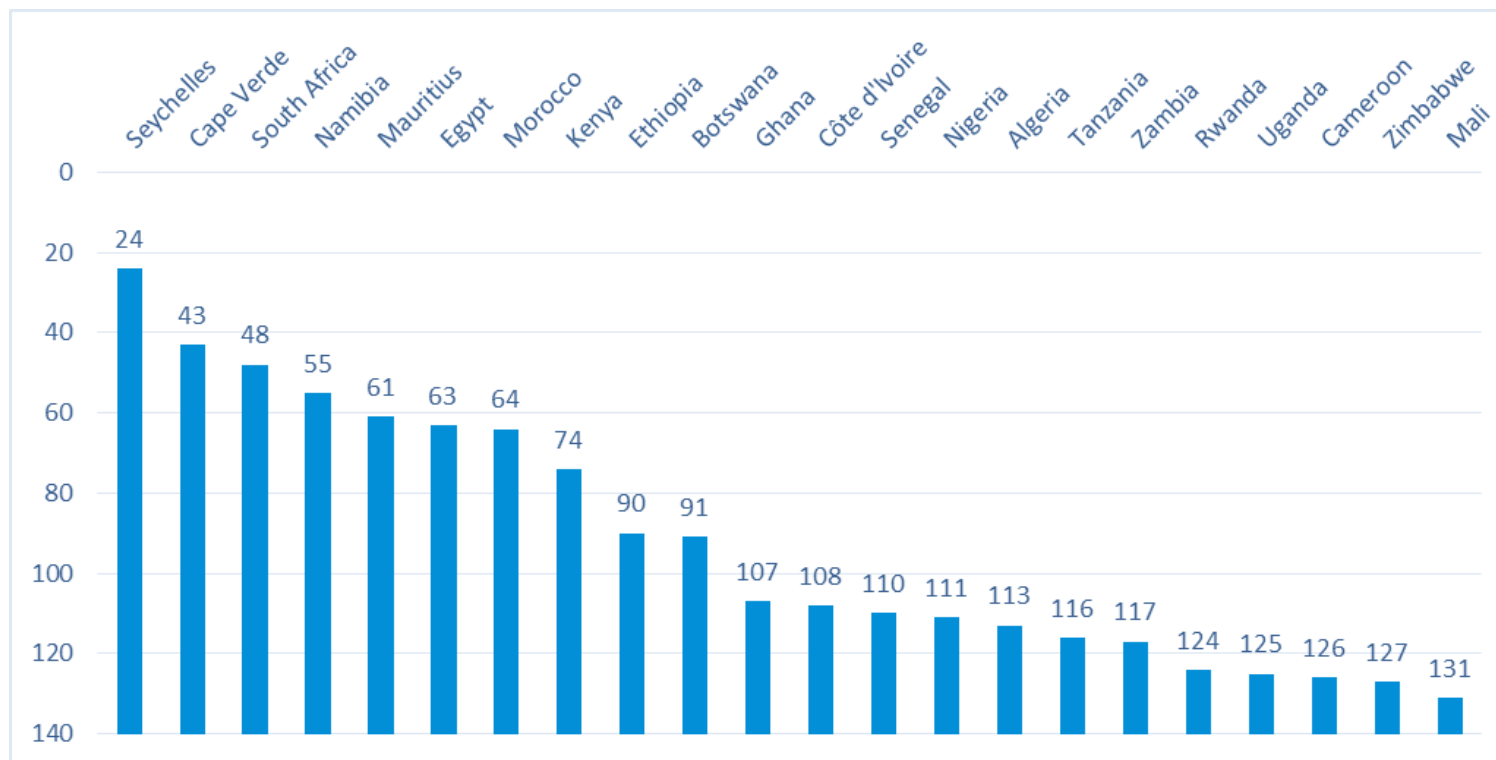
Source: World Economic Forum

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# Competitiveness affects ability to deliver value

Quality of Air Transport Infrastructure (Ranking / 140 countries)

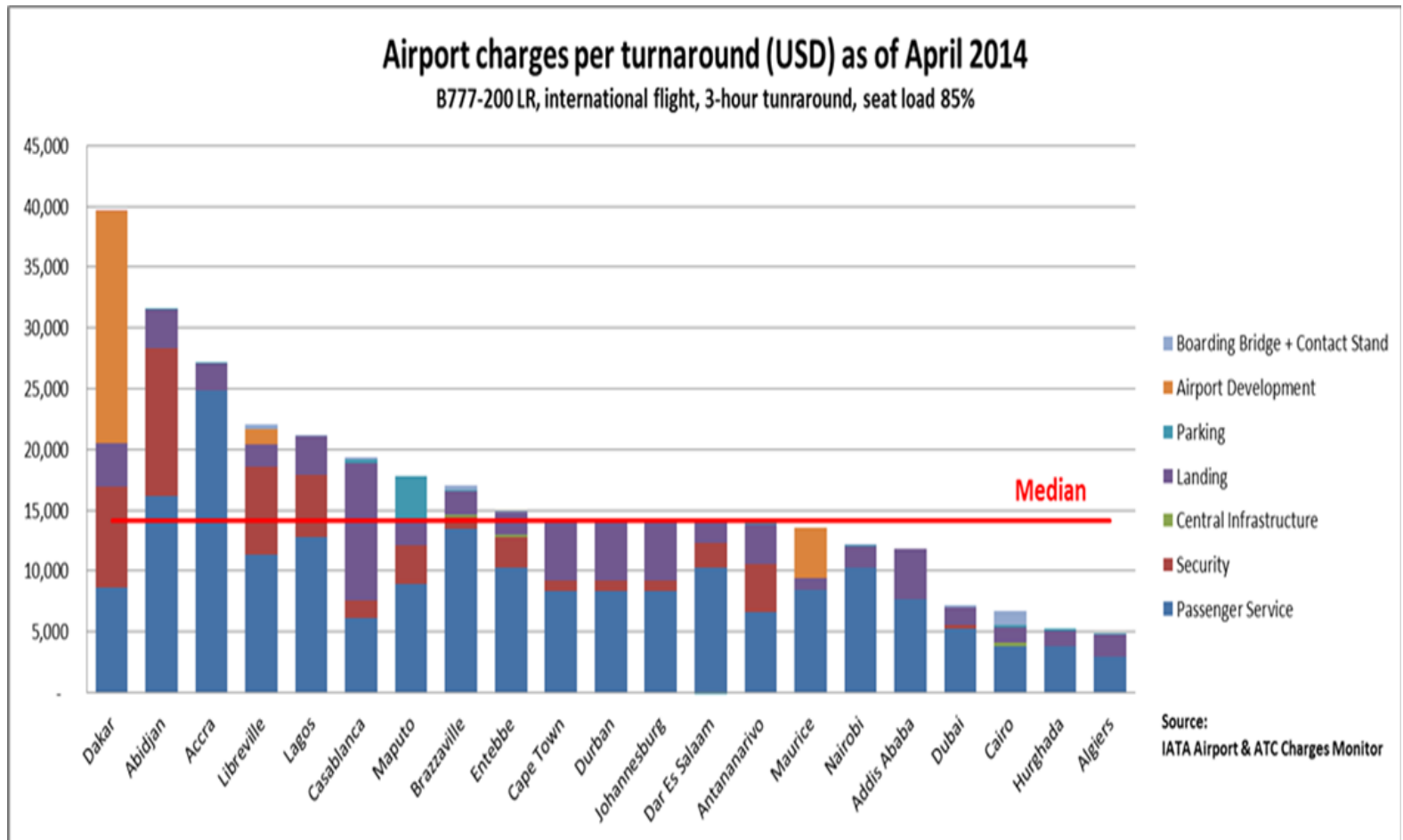


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# Comparative Aeronautical Charges



# Africa without Borders...

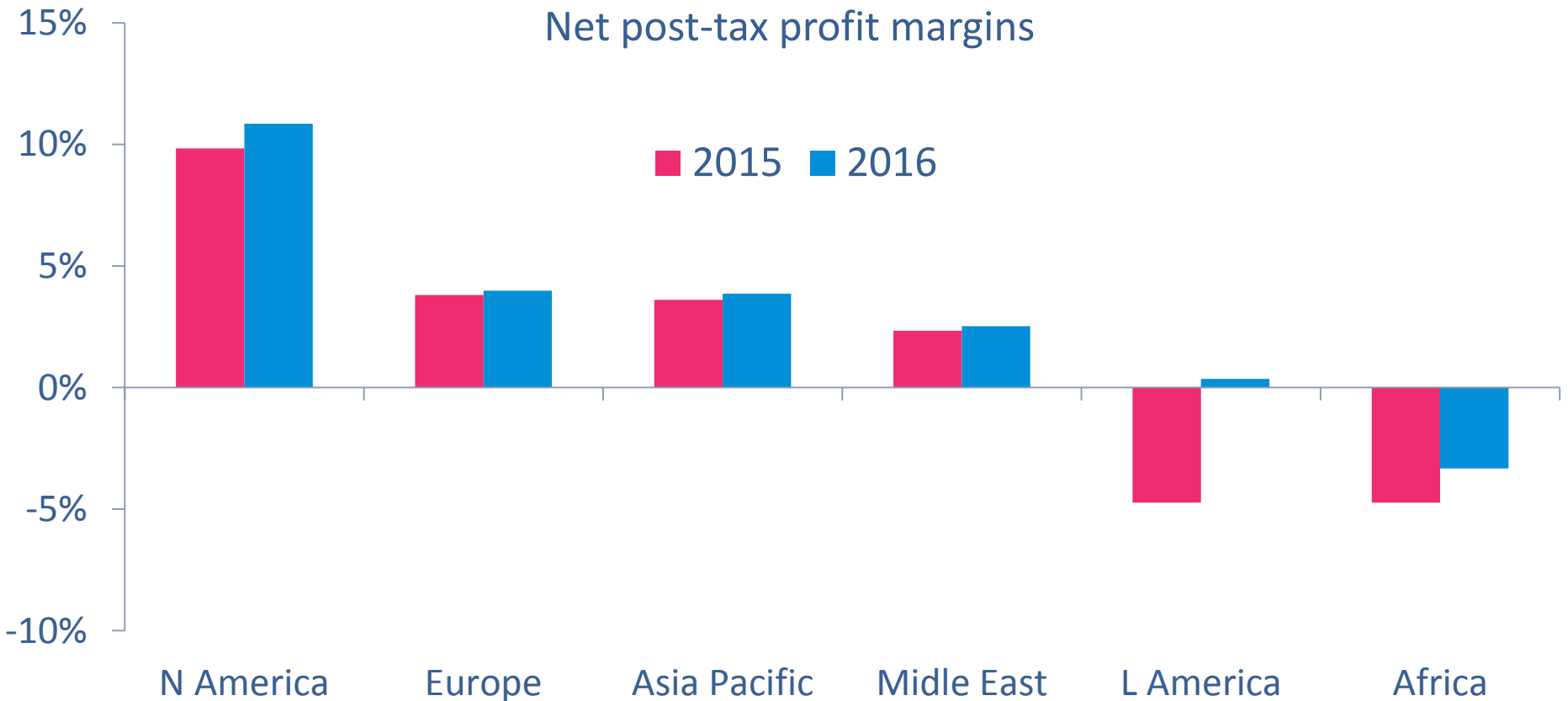


- Rwanda and Mauritius, who are in the top 10 most visa-open countries, are leading the way in making the concept of “One Africa” possible.

# MUCH NEEDED AIRLINE CONTRIBUTION

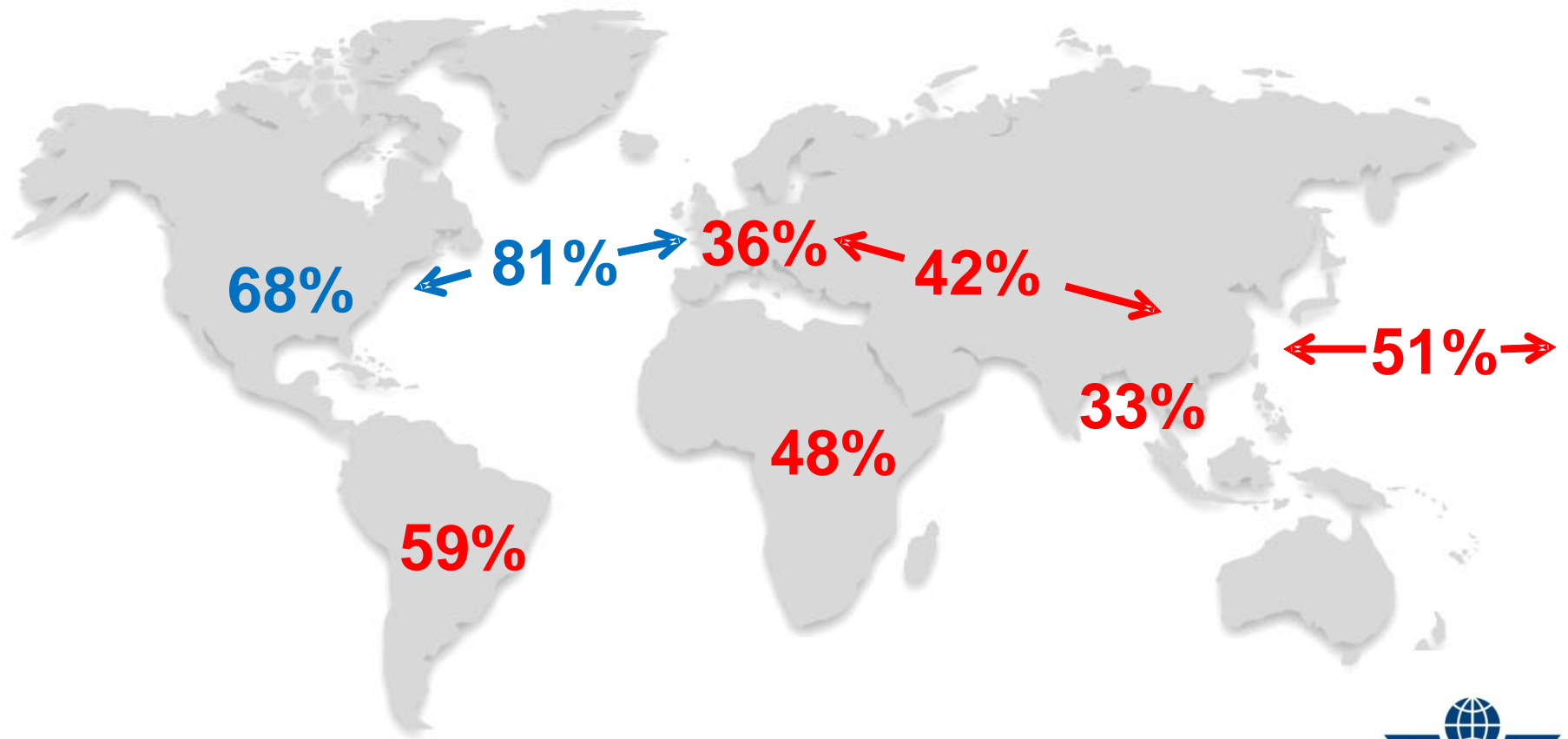


# Airlines need to be profitable to support connectivity





# Fragmentation limits economies of scale: Very limited cooperation between African carriers



# AIRLINE SUPPORT CRUCIAL FOR FULL IMPLEMENTATION OF YD

- ✓ Increase collaboration among airlines in the ECOWAS
- ✓ ECOWAS Market fragmented
- ✓ Airlines need to support full implementation of YD



*Thank You*

