



AIRPORTS COUNCIL
INTERNATIONAL
AFRICA

PREPARATORY WEBINAR
FOR AFI STATES ON ATConf/7



No Sustainable Connectivity Without Sustainable Airports

African Airport Perspectives for ATConf/7



Presented by:
**Airports Council International Africa
(ACI Africa)**



19 May 2026



GATEWAYS
to Trade
and Tourism



ENABLERS
of Regional
Integration



CATALYSTS
for Economic
Development



PLATFORMS
for National
Resilience



Africa's Strategic Connectivity Contradiction



RISING CONNECTIVITY EXPECTATIONS

African connectivity cannot grow sustainably where airport economics remain weak.



INFRASTRUCTURE FINANCING GAP IS WIDENING

African airports face significant capital constraints while demand for modern infrastructure continues to rise.



OPERATIONAL & REGULATORY EXPECTATIONS ARE INCREASING

Safety, security, sustainability and certification requirements continue to expand.



RESILIENCE PRESSURES ARE INTENSIFYING

Geopolitical shocks, supply chain disruptions, operational emergencies and climate risks require stronger preparedness.



ATConf/7 must correct the policy imbalance between rising airport expectations and weakening airport sustainability.



Four African Policy Priorities for ATConf/7



1

SUPPORT SUSTAINABLE AIRPORT INFRASTRUCTURE FINANCE

Mobilize innovative financing and blended capital to close the infrastructure gap and build climate-resilient, future-ready airports.



2

MAKE SAATM COMMERCIALY EXECUTABLE

Market access alone is not enough.

ACI Africa survey findings confirm that restrictive visa regimes, policy barriers and fragmented stakeholder coordination remain major constraints to route growth.



3

STRENGTHEN WORKFORCE & INSTITUTIONAL CAPACITY

Invest in skills, leadership and institutional capacity to build a competent, innovative and future-ready aviation sector.



4

EQUITABLE TRANSITION SUPPORT FOR AFRICAN AVIATION

Mobilize targeted support for energy transition, sustainable operations and SAF adoption in Africa.

Three Structural Risks Undermining African Connectivity

Three converging pressures are reshaping airport financial sustainability

1. PRESSURE ON AIRPORT FINANCIAL SUSTAINABILITY

- Airport charging frameworks increasingly shaped by fiscal policy rather than infrastructure sustainability.

2. EXTERNAL SHOCK EXPOSURE

- Global geopolitical volatility and operational disruptions
- Tourism and trade vulnerability

3. IMPLEMENTATION CAPACITY PRESSURE

- Expanding requirements across safety, security, certification, resilience and sustainability



Illustrative passenger cost structure

Airport Charge / Government Tax / VISA Fee (USD)	Airport Operator	State
<i>International Passenger (USD)</i>		
Passenger Service Charge	100	
Security Charge		20
Passenger Tax		184
VISA processing		0 – 253
Biometric Fee		210
TOTAL	100	414 - 667

Airports are expected to absorb global shocks with **structurally fragile** balance sheets.

This is not sustainable.

From Policy to Delivery

How African Airports Need Support

1 AIRPORT READINESS

KEY NEEDS

- Airport Modernisation
- Operation Resilience
- Certification Readiness
- Emergency Preparedness
- Smart Airport Systems

ACI AFRICA RESPONSE with our Programs

- African Airports Certification Assistance Program
- Smart Airport Certification & Operations Software
- Emergency Preparedness & Simulation Exercises
- Technical Advisory & Support Services

STRATEGIC OUTCOME

Safer, more efficient and certification-ready airports

2 CONNECTIVITY GROWTH

KEY NEEDS

- Financial Sustainability
- Route Development
- Commercial Viability
- Investment Readiness

ACI AFRICA RESPONSE with our Programs

- RouteInsight
Accelerating African Connectivity Through Smarter Route Development
- ACI ESG
ACI voluntary airport-specific framework for Environmental, Social, and Governance reporting

STRATEGIC OUTCOME

Stronger airport revenues, improved connectivity and greater investor confidence

3 INSTITUTIONAL STRENGTHENING

KEY NEEDS

- Skills Shortages
- Leadership Gaps
- Regulatory Strengthening
- Sustainability Capacity

ACI AFRICA RESPONSE with our Programs

- Post Graduate Master Program
- Scholarship Program for Women in Aviation
- Sustainable Aviation Academy
- Strategic Aviation Leadership Essentials

STRATEGIC OUTCOME

Future-ready airport leadership and stronger institutional resilience

Policy reform must be matched by implementation support.



Digital Tools



Advisory Services



Route Development



Certification Assistance



Leadership Programs



Environmental Sustainability

Africa's Call to Action for Lomé and Montréal



ACI Africa Call to the ATConf/7
To ensure airports are recognised as strategic economic infrastructure requiring viable policy frameworks, sustainable financing and long-term investment support.



PRESERVE COST RECOVERY PRINCIPLES

Reaffirm ICAO principles that airport charges are infrastructure cost-recovery mechanisms, not fiscal or political instruments.



SUPPORT SUSTAINABLE INFRASTRUCTURE FINANCE

Mobilize innovative and blended financing to close Africa's infrastructure gap and build climate-resilient, future-ready airports.



MAKE SAATM COMMERCIALLY EXECUTABLE

Accelerate SAATM through pragmatic commercial implementation that delivers sustainable connectivity growth.



SUPPORT EQUITABLE CLIMATE TRANSITION

Match climate obligations with financing, technical assistance and practical transition support for African airports.



STRENGTHEN AIRPORT WORKFORCE & INSTITUTIONAL CAPACITY

Strengthen skills, leadership and institutional capacity to deliver safer, more efficient, innovative and customer-focused airports.

“There can be no sustainable connectivity without sustainable airports”

Thank You

