AASPG/2 MEETING

Aviation Infrastructure Update

Gap analysis, investment pipelines and outcomes of the Kigali Consultative Meeting

Livingstone, Zambia, 2 - 6 November 2026



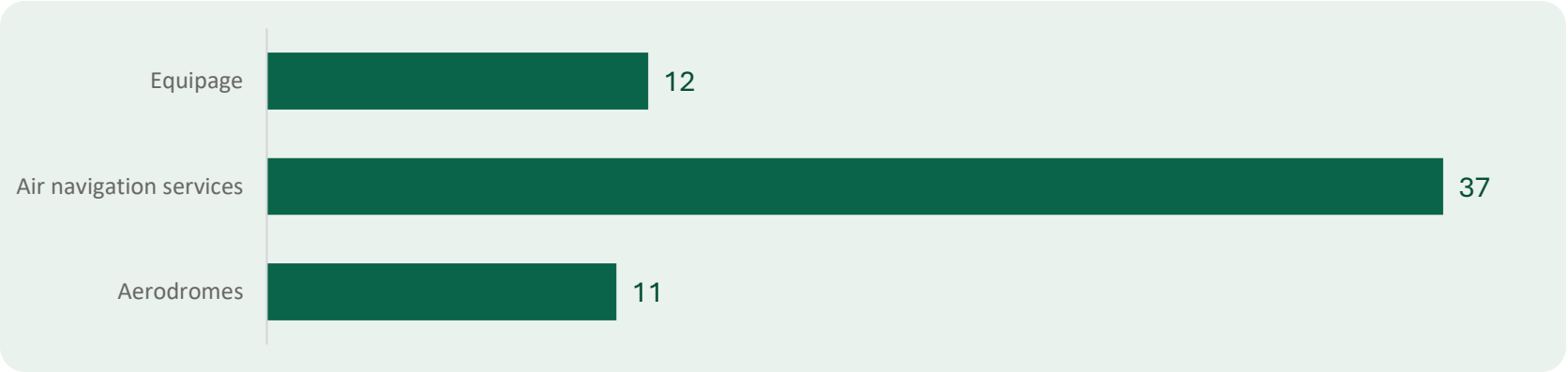
Gap analysis to investment pipelines

2023 baseline across 41 African States

41
STATES COVERED

60
GAPS IDENTIFIED

Breakdown of 60 gaps



Lomé ambition **Five pipelines; at least five projects towards bankability in 12–24 months.**

Five continental investment pipelines

Project Pipelines developed from the gap analysis and endorsed by STC

1



AERODROMES & CARGO INFRASTRUCTURE UPGRADE AND MODERNISATION

2



AIR NAVIGATION SERVICES MODERNIZATION

3



ENVIRONMENTAL PROTECTION

4



AVIATION SECURITY EQUIPMENT AND SYSTEMS

5



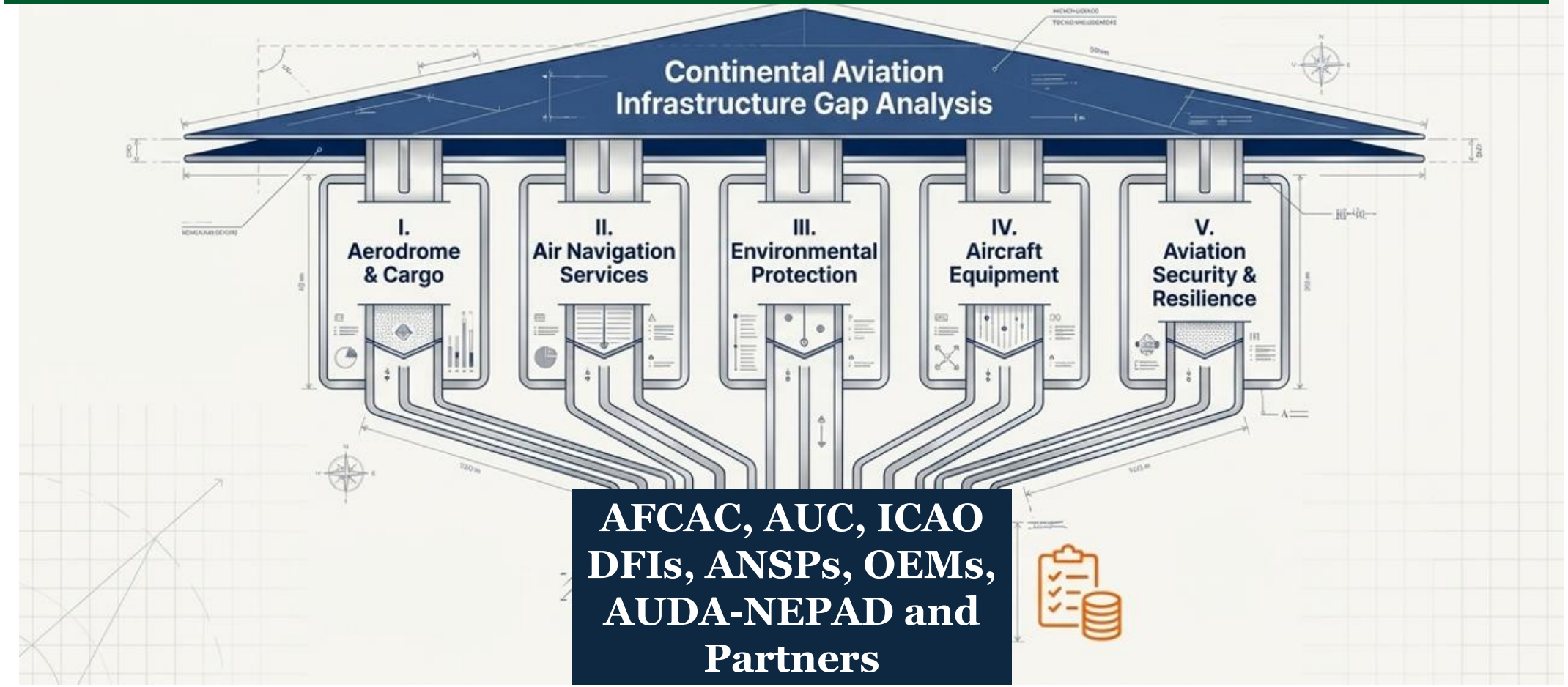
AIRCRAFT EQUIPMENT MODERNIZATION AND UPGRADE



AVIATION INFRASTRUCTURE PIPELINES PROVIDE A PRACTICAL IMPLEMENTATION PATHWAY FOR AFRICA.

Political Endorsement of Bankable Projects

Securing political endorsement at the AU STC – T&E in April 2026 and the Lome Declaration during the African Air Transport Convention and Expo in June 2026



30 identified Projects packaged into 5 Bankable Project Pipelines

Endorsed at STC-T&E (Johannesburg) & Lomé Declaration (June 2026) and 11 Member States prioritized projects submitted to AFREXIMBANK to mobilize international financing under SAATM.

1. Aerodrome & Cargo Modernization

Burundi (Passenger Terminal/Apron), Eswatini (KMIII IA Cargo Terminal), Gambia (Runway overlay/AGL), Mali (Freight/logistics).

2. Air Navigation Services (ANS) Modernization

Deployment of PBN, CNS/ATM modernization, e-AIP/AIXM, and digital AIM across Zimbabwe, Mozambique, Mali, and Gabon.

3. Environmental Protection / SAF

Kenya (Mombasa refinery conversion to Bio-refinery for SAF), Gabon (SAF feasibility studies and production).

4. Aviation Security Equipment & Systems

Zimbabwe & Mali (ARFF emergency vehicles, e-Gates, biometric passenger processing, CCTV surveillance, X-ray equipment).

5. Aircraft Equipment Modernization

Upgrades to fleet operational readiness, aircraft equipment, and maintenance compliance across regional carriers.

Member State priority infrastructure submissions

From identified infrastructure needs to a structured continental project-development pipeline

11

MEMBER STATES

Priority submissions

Kenya
Burundi
Eswatini
São Tomé & Príncipe
Zimbabwe
Zambia
The Gambia
Mozambique
Mali
Gabon
Liberia

Initial portfolio for project preparation

MAPPING TO AFCAC PIPELINES

PIPELINE 1

Aerodrome, terminal, cargo, safety & security infrastructure

4 States primarily mapped here

PIPELINES 1 + 2

Airport infrastructure + ANS modernisation

5 States span both pipelines

MAIN PRIORITY AREAS

AIRPORTS & AIRSIDE | **CARGO** | **SAF** | **ATM • CNS • PBN • AIM**

WHAT THE SUBMISSIONS MEAN

1

PRIORITY NEEDS IDENTIFIED

Member States have identified infrastructure requirements for development.

2

MAPPED TO CONTINENTAL PIPELINES

Priorities are organised against the AFCAC investment-pipeline framework.

3

FURTHER DEFINITION REQUIRED

Submissions are not yet a uniform portfolio of fully defined investment projects.

4

NEXT: READINESS → BANKABILITY

Clarify ownership, scope, evidence, costs and preparation plans before financing discussions.

Bankable Project Proposals

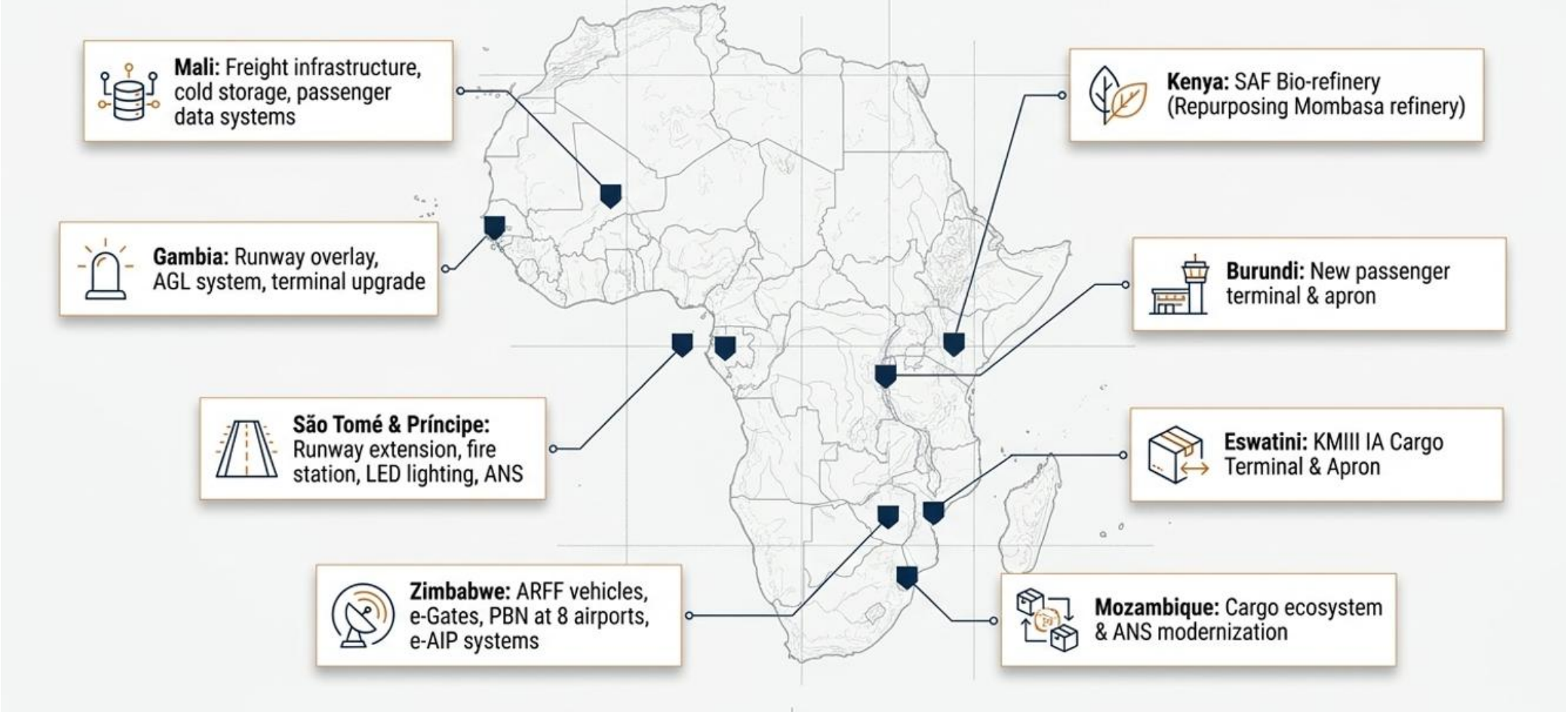
Aviation Infrastructure Projects and Pipeline distribution

Country Infrastructure Highlights

- **São Tomé and Príncipe (5 Pipelines)**
  Leads continental submissions with 5 bankable pipelines spanning Aerodrome, ANS, SAF, Equipment, and Security.
- **Zimbabwe & Mali (4 Pipelines each)**
  Focus on ANS/PBN modernization and security equipment (ARFF emergency vehicles, e-Gates, biometric processing).
- **Gambia & Mozambique (2 Pipelines each)**
  Gambia prioritizes Banjul Airport runway overlay and Airfield Ground Lighting (AGL); Mozambique focuses on ANS deployment.

Member State	Pipeline Submissions
São Tomé and Príncipe	**5 Pipelines**
Zimbabwe	**4 Pipelines**
Mali	**4 Pipelines**
Mozambique	**2 Pipelines**
Gambia	**2 Pipelines**
Gabon	**2 Pipelines**
Kenya	**1 Pipeline**
Burundi	**1 Pipeline**
Eswatini	**1 Pipeline**

Continental Distribution of Project Proposals



Five agreed outcomes provide the structure for the Kigali conclusions

01 **Common project-development framework**

A single pathway with defined stages and exit conditions.

02 **Readiness assessment**

Assessment of priority projects submitted by Member States.

03 **Technical and financial support**

Support required to advance selected projects.

04 **Appropriate financing models**

Financing matched to project economics, risks and revenue.

05 **Post-Kigali implementation**

Roadmap, responsibility matrix and monitoring arrangements.

Status of priority projects submitted by States

Meeting finding

Most submitted projects are still at the priority-need or project-definition stage.

They require clearer ownership, scope, evidence, costs and preparation plans before they can proceed to financing discussions.

Immediate requirement

01 **Sponsor and governance**

Named project owner, focal point and decision authority

02 **Market and demand**

Credible traffic, cargo or service-demand evidence

03 **Technical definition**

Scope, standards, interoperability and lifecycle plan

04 **Legal and safeguards**

Approvals, land, procurement and environmental pathway

05 **Financial basis**

Cost range, revenue or payment model and affordability

A common route to financing

Projects progress when the exit condition at each stage is verified

01

PRIORITY

Strategic alignment and sponsor

02

DEFINITION

Scope and preferred option

03

FEASIBILITY

Viability and safeguards

04

STRUCTURING

Delivery and finance plan

05

APPRAISAL

Independent DFI review

Financial close and implementation follow appraisal and financing decisions.

Post-Kigali Roadmap and Responsibility Matrix

A phased pathway to move priority aviation infrastructure projects from organisation and readiness to bankability and implementation.

0–30 DAYS

MOBILISE

1

Constitute platform

Agree ToR & focal points

Confirm sponsors

Platform operational

30–90 DAYS

CONSOLIDATE & ASSESS

2

Consolidate five pipelines

Complete project information

Apply readiness criteria

Register + readiness profiles

3–6 MONTHS

PREPARE

3

Run project clinics

Define project-specific plans

Select acceleration portfolio

≥5 projects enter accelerated preparation

6–18 MONTHS

DEVELOP

4

Feasibility & safeguards

Demand / financial analysis

Delivery & financing structure

Investment documentation prepared

18–24+ MONTHS

APPRAISE & FINANCE

5

DFI engagement & due diligence

Address appraisal conditions

Procurement / financial close

Projects advance to financing & implementation

LOMÉ AMBITION: advance at least five priority projects towards bankability within 12–24 months.

Post-Kigali Roadmap and Responsibility Matrix

Clear ownership across policy, coordination, project preparation, financing and technical support.

POLICY & OVERSIGHT — AUC → **COORDINATION & PORTFOLIO** — AFCAC → **PROJECT PREPARATION** — AUDA-NEPAD → **PROJECT OWNERSHIP** — STATES / SPONSORS → **APPRAISAL & FINANCING** — DFIs

AUC

Policy guidance • SAATM/PIDA alignment • escalation

AU policy organs

AFCAC

Pipeline management • convening • progress monitoring

Register • tracker • reports

AUDA-NEPAD

Readiness assessments • project clinics • preparation planning

Assessments • preparation plans

Member States / Sponsors

Information • studies • approvals • procurement • implementation

PIMS • approvals • progress reports

DFIs

Eligibility feedback • preparation support • appraisal • financing decisions

Appraisal requirements • financing decisions

ENABLING PARTNERS

RECs • AfCFTA Secretariat • ICAO & technical partners • IATA / AFRAA / ACI / CANSO / operators • Preparation facilities & advisers

Regional coordination • standards & capacity • market validation • technical advice • studies, safeguards and transaction support

Action by the Meeting

The Meeting is invited to:

1

TAKE NOTE

Take note of the developments concerning the identification, preparation and advancement of priority aviation infrastructure projects towards bankability.

2

STAKEHOLDER COORDINATION & ENGAGEMENT

Support the establishment a stakeholder coordination and engagement mechanism involving AUC, AFCAC, AUDA-NEPAD, ICAO, IATA, AFRAA, Development Finance Institutions (DFIs), Regional organizations and Member States to develop a common investment-ready aviation infrastructure projects that support SAATM, and seamless interoperable African airspace

3

ENCOURAGE FOLLOW-UP & IMPLEMENTATION

Encourage stakeholders mapped in the Post-Kigali Roadmap and Responsibility Matrix to initiate follow-up actions and implementation, consistent with the Lomé Declaration and Implementation Matrix, with a focus on advancing priority projects towards bankability within the 12–24 month window.

African Aviation

Transformed



Thank You

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