INTERNATIONAL CIVIL AVIATION ORGANIZATION

Second Meeting of the Africa - Indian Ocean Aviation System Planning and Implementation Group (AASPG/2)

Livingstone, Zambia, 2 - 6 November 2026

Agenda Item 4: Implementation of air navigation goals, targets and indicators, including the priorities set in the regional air navigation plan

AVIATION INFRASTRUCTURE UPDATE: FROM GAP ANALYSIS TO BANKABLE PRIORITY PROJECTS

(Presented by AFCAC)

SUMMARY	
This working paper provides an update on the implementation of the continental aviation infrastructure agenda, from the 2023 Aviation Infrastructure Gap Analysis and establishment of five continental investment pipelines to the submission of priority infrastructure projects and requirements by Member States and the outcomes of the Kigali Consultative Meeting. It highlights the mapping of Member States' priorities to the continental investment pipelines, the agreed common project-development framework and identified project-readiness challenges, as well as the Post-Kigali Roadmap and institutional Responsibility Matrix for supporting the progressive preparation and advancement of priority projects towards bankability. Action by the Meeting is in paragraph 3.	
Strategic Objectives	*C. Aviation Delivers Seamless, Accessible, and Reliable Mobility for All* *F. The Economic Development of Air Transport Assures the Delivery of Economic Prosperity and Societal Well-Being for All*
References	1. Final Report - Aviation Infrastructure Gap Analysis in Africa (2023) and 25-Year Forecast for Air Traffic Demand; and 2. Final Report - African Aviation Infrastructure Bankable Projects 3. Report of the African Air Transport Convention and Expo, 2026

1. INTRODUCTION

1.1 The 2023 Aviation Infrastructure Gap Analysis in Africa established a continental baseline covering 41 African States and identified 60 infrastructure gaps: 11 relating to aerodromes, 37 to air navigation services and 12 to aircraft equipage. The findings were subsequently consolidated into five continental investment pipelines to provide a more structured basis for project development and investment engagement.

1.2 The Africa Air Transport Convention and Expo held in Lomé, Togo in June 2026 agreed to advance at least five priority aviation infrastructure projects towards bankability within a 12–24-month period.

1.3 The Consultative Meeting on Aviation Infrastructure Development and Implementation held in Kigali, Rwanda, from 14 to 17 September 2026, jointly organized by the African Union Commission (AUC) and the African Civil Aviation Commission (AFCAC), and hosted by Rwanda Civil Aviation Authority, held in Kigali, Rwanda in from 14-17 September 2026,

focused on translating this need into a common project-development framework, assessing project readiness, identifying technical and financial support requirements, considering appropriate financing models, and agreeing on a post-Kigali implementation roadmap and responsibility matrix.

2 DISCUSSION

2.1 The five (5) Continental Aviation Infrastructure Pipelines are as follows:

i. Aerodrome and cargo infrastructure upgrade and modernization
ii. Air navigation services modernization
iii. Aircraft equipment modernization and upgrade
iv. Aviation Security equipment and systems
v. Environmental protection

2.2 Eleven (11) Member States submitted priority aviation infrastructure requirements for further project development. The Member States are Kenya, Burundi, Eswatini, São Tomé and Príncipe, Zimbabwe, Zambia, The Gambia, Mozambique, Mali, Gabon and Liberia. The submissions cover airport and passenger infrastructure, cargo and cold-chain facilities, runway and airside improvements, aviation safety and security infrastructure, Sustainable Aviation Fuel facilities, and modernization of air navigation services, including ATM, CNS, PBN and digital AIM.

2.3 The Consultative Meeting discussed five (5) agreed outcomes aimed at accelerating the preparation, development, financing and implementation of aviation infrastructure projects across Africa. The Key outcomes of the Kigali consultative meeting include a Continental Aviation Infrastructure Project Development Framework, a standardized Project Readiness Assessment Framework, Project Preparation and DFI Engagement Framework, and a Post-Kigali Implementation Roadmap and Responsibility Matrix.

2.4 These outcomes provide a structured pathway for Member States to advance priority infrastructure projects from concept to bankability and implementation. The meeting identified significant project readiness gaps and recommended the creation of a Post-Kigali Project Acceleration Platform supported by a common project development framework, readiness assessment methodology and coordinated technical and financial support mechanisms

2.5 The Kigali discussions confirmed that most priority projects submitted by Member States are at the priority-need or project-definition stage. The Development Financing Institutions are keen to ensure that all projects have clearer ownership and governance, credible market or demand evidence, adequate technical definition, legal and safeguards pathways, and a preliminary financial basis including cost ranges, revenue or payment models and affordability considerations.

2.6 A common project-development pathway was therefore agreed, comprising five progressive stages: *Priority, Definition, Feasibility, Structuring and Appraisal*. Progression is dependent on verification of the relevant exit conditions at each stage. Priority status alone does not constitute DFI endorsement or a financing commitment.

2.7 The meeting agreed on a need to establish a coordination stakeholders 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, which include a seamless interoperable African airspace.

2.8 The post-Kigali roadmap provides a phased pathway from mobilization to financing. During

the first 0–90 days, the focus will be on the establishment of the common project platform with key stakeholders, agreeing on terms of reference and focal points, confirming project sponsors, consolidating projects under the five pipelines, completing project information and applying readiness criteria. During months 3–6, project clinics and project-specific preparation plans are expected to support selection of an initial acceleration portfolio, with at least five projects entering accelerated preparation.

2.9 From 6–18 months, selected projects should progress through feasibility and safeguards work, demand analysis, preliminary financial modelling, and definition of delivery and financing structures. Between 18–24 months and beyond, mature projects should enter DFI engagement, due diligence and appraisal, address appraisal conditions, and progress towards financing, procurement and implementation in accordance with project-specific schedules.

2.10 The responsibility matrix establishes clear institutional ownership. The AUC provides policy oversight, alignment and escalation; AFCAC coordinates the aviation portfolio, maintains the project register and tracker, convenes stakeholders and monitors progress; AUDA-NEPAD supports readiness assessment, project clinics and preparation planning; Member States and project sponsors retain project ownership and responsibility for information, studies, approvals, procurement and implementation; and DFIs provide eligibility feedback, preparation support, independent appraisal and financing decisions. RECs, the AfCFTA Secretariat, ICAO and technical partners, industry organizations, operators, preparation facilities and advisers provide enabling regional, technical, market and transaction support.

2.11 The immediate implementation priority is to convert the agreed roadmap and responsibility matrix into coordinated follow-up by the key stakeholders. This should maintain Member State ownership while establishing a structured and systematic preparation process that enables credible projects to move from identified infrastructure needs to bankability, financing and implementation.

3 ACTION BY THE MEETING

The meeting is invited to:

a) take note of developments concerning the identification, preparation and advancement of priority aviation infrastructure projects towards bankability;

b) establish 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; and

c) encourage stakeholders identified 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 period.

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