



WORKING PAPER

SEVENTH WORLDWIDE AIR TRANSPORT CONFERENCE (ATCONF/7)

Montréal, HQ, 16 to 20 November 2026

Agenda Item 2: Fostering aviation growth and air connectivity through investments in infrastructure, human capital and partnerships

2.2: Investment for the development and modernization of civil aviation infrastructure

FINANCING AVIATION INFRASTRUCTURE FOR RESILIENT AND SUSTAINABLE CONNECTIVITY

(Presented by South Africa on behalf of 54 Member States of the African Civil Aviation Commission²)

EXECUTIVE SUMMARY

This working paper builds on the outcomes of the African Air Transport Convention and Expo held in Lomé, Togo, in June 2026, where the African Civil Aviation Commission (AFCAC), the African Union Commission, Member States, development finance institutions and industry partners considered practical measures for advancing Africa's aviation infrastructure priorities towards implementation.

The Convention followed up on the 2023 Aviation Infrastructure Gap Analysis and the five Aviation Infrastructure Project Pipelines subsequently circulated to Member States to guide the identification and submission of priority projects. Member States are now encouraged to progress beyond the identification of infrastructure needs by defining project scope, undertaking feasibility studies, demand forecasting, environmental and social impact assessments, financial modelling, risk analysis and project structuring. These preparatory activities are essential to transform national and regional priorities into mature, bankable projects capable of attracting financing.

The paper particularly promotes regional and cross-border projects that support seamless systems, infrastructure interoperability, Single African Air Transport Market (SAATM) implementation and improved passenger and cargo connectivity. It further highlights AFCAC's continuing engagement with development finance institutions and international partners to strengthen project-preparation capacity, establish sustainable financing pathways and mobilise appropriate public, private, concessional and blended-finance instruments.

Action: The Conference is invited to action items in paragraph 5.

<i>Strategic Goal:</i>	This working paper relates to Strategic Goal: <i>The Economic Development of Air Transport Assures the Delivery of Economic Prosperity and Societal Well-Being for All.</i>
<i>Financial implications:</i>	The activities referred to in this paper will be undertaken subject to the resources available in the 2026–2028 Regular Budget and/or from extra-budgetary contributions, including the Voluntary Air Transport Fund.

¹ English and French versions provided by AFCAC.

² Algeria, Angola, Benin, Botswana, Burkina Faso, Burundi, Cameroon, Cabo Verde, Central African Republic, Chad, Comoros, Congo, Côte d'Ivoire, Democratic Republic of the Congo, Djibouti, Egypt, Equatorial Guinea, Eritrea, Eswatini, Ethiopia, Gabon, Gambia, Ghana, Guinea, Guinea-Bissau, Kenya, Lesotho, Liberia, Libya, Madagascar, Malawi, Mali, Mauritania, Mauritius, Morocco, Mozambique, Namibia, Niger, Nigeria, Rwanda, Sao Tome and Principe, Senegal, Seychelles, Sierra Leone, Somalia, South Africa, South Sudan, Sudan, Togo, Tunisia, Uganda, United Republic of Tanzania, Zambia, Zimbabwe.

References:	<i>2023 Aviation Infrastructure Gap Analysis in Africa and 25-Year Forecast for Air Traffic Demand – Final Report (AUC, AFCAC, ICAO)</i> <i>African Aviation Infrastructure Bankable Project Report</i> <i>Declaration and Framework for a Plan of Action for Development of Aviation Infrastructure in Africa (The Third ICAO World Aviation Forum (IWAF/3), Abuja, 2017)</i> <i>Doc 9750, ICAO Global Air Navigation Plan</i> <i>Doc 7474, AFI Air Navigation Plan</i> <i>Programme for Infrastructure Development in Africa (PIDA) Priority Action Plan</i> <i>Doc 9854, Global Air Traffic Management Operational Concept</i>
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1. INTRODUCTION

1.1. The African Union (AU) launched the Single African Air Transport Market (SAATM) in 2018 to create seamless, safe and interoperable African airspace. Achieving this vision requires substantial investment in harmonized, technology-driven airport and air navigation infrastructure, despite persistent financing challenges.

1.2. In response, the African Union Commission (AUC), the African Civil Aviation Commission (AFCAC) and the International Civil Aviation Organization (ICAO), with the support of the African Airlines Association (AFRAA), the International Air Transport Association (IATA), the Regional Safety Oversight Organizations (RSOOs), the Air Navigation Services Providers (ANSPs), the Regional Economic Communities (RECs) and 41 African States, completed the 2023 Aviation Infrastructure Gap Analysis in Africa and 25-Year Forecast for Air Traffic Demand, following the Third ICAO World Aviation Forum (IWAF/3) Abuja Declaration of 2017. The study identified 60 gaps: 11 relating to aerodromes, 37 to air navigation services and 12 to aircraft equipment. It also projected that passenger traffic would grow from approximately 160 million in 2024 to 469 million by 2050, reinforcing the urgency of timely, coordinated investment.

1.3. The central issue is therefore no longer only the existence of infrastructure deficits. It is the absence, in many cases, of the project-preparation capacity, institutional coordination and financing architecture needed to convert identified priorities into costed, bankable and implementable projects. This paper sets out the Africa-led response to that delivery gap and proposes areas in which ICAO and international partners can add practical value.

2. FROM GAP ANALYSIS TO FIVE PROJECT PIPELINES

2.1 The 60 gaps were consolidated through a weighted assessment of feasibility, complexity, political considerations, safety risk, impact and criticality into five Aviation Infrastructure Project Pipelines: (a) Aerodrome and Cargo Infrastructure Upgrade; (b) Air Navigation Services and CNS/ATM Modernization; (c) Aircraft Equipment Modernization and Upgrade; (d) Aviation Security Equipment, Systems and Resilience; and (e) Climate-Resilient and Sustainable Aviation Infrastructure.

2.2 The pipelines provide a common framework through which States and regional institutions can align priority submissions, avoid isolated and duplicative investments, and identify opportunities for interoperable, pooled and cross-border projects. They also connect infrastructure planning to safety, security, facilitation, environmental sustainability, cargo development feeding into the work being undertaken by stakeholders towards the AFI Air Navigation Services (ANS) Master Strategy for a Seamless Sky.

3. LOMÉ: THE DEPARTURE POINT FROM DIAGNOSIS TO DELIVERY

3.1 The African Air Transport Convention and Expo held in Lomé, Togo, in June 2026 was pivotal because it moved the continental process beyond the listing of deficiencies. It brought together governments, civil aviation authorities, airport operators, air navigation service providers, airlines, industry, development finance institutions and technical partners to test how the five pipelines could be translated into investable projects.

3.2 Five thematic infrastructure panels examined the project-development cycle and exposed recurring constraints at each stage. These included insufficiently defined project scope and ownership; incomplete technical, traffic, economic, environmental and social studies fragmented national and regional planning; uncertainty in risk allocation and guarantees; and engagement with financiers only after projects had been designed rather than during their preparation.

3.3 The Lomé discussions established a structured pathway from project identification and feasibility to bankability, financing and implementation, recognizing that finance cannot replace adequate project preparation. AFCAC and the AUC are coordinating Member State submissions and partner engagement to advance at least 5 priority projects towards bankability within 12–24 months.

4. CONTINENTAL PRIORITIES FOR PROJECT PREPARATION AND FINANCING

4.1 Africa needs a coordinated project-preparation mechanism to advance selected projects to investment readiness. It should provide multidisciplinary expertise, apply transparent prioritization criteria, develop project information and financing options, and monitor projects from concept to implementation.

4.2 Regional and cross-border projects require harmonized planning to address differing standards, procurement systems, mandates and revenue arrangements. This will reduce fragmentation, improve interoperability and economies of scale, and support the effective implementation of SAATM.

4.3 Financing should reflect project characteristics and national circumstances, with public or concessional resources supporting safety-critical and low-revenue infrastructure and private or blended finance supporting commercially viable projects. Project preparation must establish affordability, demand, revenue and risk allocation before procurement or financial commitments.

5. ACTION BY THE CONFERENCE

5.1 The Conference is invited to:

- a) note the 2023 Gap Analysis, the five Aviation Infrastructure Project Pipelines and the outcomes of the 2026 Lomé Convention as Africa's coordinated framework for moving from identified infrastructure needs to bankable and implementable projects;
- b) invite ICAO to reflect the lessons from Africa's gap-analysis-to-bankability process in its continuing work on aviation infrastructure financing, the Global Air Navigation Plan and the *No Country Left Behind* initiative;
- c) request ICAO to strengthen practical guidance on aviation project preparation, bankability, financing structures and public-private participation, adapted to the needs of developing States; and
- d) encourage development finance institutions and partners to provide project-preparation facilities, concessional and blended-finance instruments, guarantees and other de-risking solutions for safety-critical, cross-border and climate-resilient aviation infrastructure.