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ECONOMIC COMMISSION

Agenda Item 26: Economic Development of Air Transport

AVIATION INFRASTRUCTURE GAP ANALYSIS IN AFRICA

(Presented by the African Civil Aviation Commission (AFCAC) on behalf of 54 African States²)

EXECUTIVE SUMMARY

The African Union Commission (AUC) in collaboration with the African Civil Aviation Commission (AFCAC) and the International Civil Aviation Organization (ICAO) in the framework of implementation of the AUC Single African Air Transport Market (SAATM) Joint Prioritized Action Plan (Pillar 4 on Aviation infrastructure) initiated a continental-wide project on Aviation Infrastructure Gap Analysis through a meeting of the Technical Working Group (TWG) of Experts from Member States and various International Organizations held from 27th to 30th June 2023 in Casablanca, Morocco.

This paper provides an update on the implementation of the 2023 Aviation Infrastructure Gap Analysis project, conducted by the African Union Commission, AFCAC, and ICAO. It highlights validated infrastructure needs, traffic forecasts, and next steps for developing regional bankable projects in support of SAATM and the Seamless African Airspace.

<i>Strategic Goals:</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>	To be determined

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, Cote 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.

<i>References:</i>	<i>Aviation Infrastructure Gap Analysis in Africa (2023) and 25-year Forecast for Air Traffic Demand</i> <i>AFCAC Constitution.</i> <i>AFCAC 10-Year Strategic Plan (2022-2032)</i> <i>Concept Note on Aviation Infrastructure Gap Analysis Technical Working Group Workshop</i> <i>2023 Aviation Infrastructure Gap Analysis Final Report.</i> <i>AFCAC Consolidated 2025 Strategic Document and Work Programme.</i>
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1. INTRODUCTION

1.1 The African Union Commission (AUC) launched the Single African Air Transport Market (SAATM) initiative in January 2018 and one of its key objectives was the development of a seamless African Airspace Architecture that would provide safe, efficient and interoperable air navigation services throughout the continent. As part of this initiative, the AUC in collaboration with the African Civil Aviation Commission (AFCAC) and the International Civil Aviation Organization (ICAO) initiated a Continental Aviation Infrastructure Gap Analysis with the objective of establishing the gaps existing in the airports and air navigation infrastructure and services with a traffic projection of 25 years. The ultimate goal is to develop a clear roadmap for achieving a Seamless Airspace and Air Navigation Systems Architecture to cope with the expected increase in traffic while addressing associated challenges in terms of aviation safety, airspace capacity and efficiency of air transport operations in a seamless environment. The 35th Ordinary Plenary of AFCAC urged AUC and AFCAC to coordinate with all stakeholders to ensure that similar initiatives such as the Air Navigation Summit are harmonized for the effective implementation of the Continental Seamless Airspace Architecture within a specified timeframe.

2. DISCUSSION

2.1 Data was collected from 41 States and 70 airlines as per the following breakdown –

Questionnaires		State Feedback
(i)	International aerodromes	41 States responded
(ii)	Air navigation services (ATM, CNS, Meteorology, Search & Rescue, AIM)	40 States responded
(iii)	Airlines (aircraft fleet and equipage)	70 airlines responded
(iv)	Traffic forecasts up to 25 years	Available information augmented by data from ATNS, IATA, ACI and ICAO

2.2 The validated outcomes presented in Addis Ababa in June 2024 identified a total of 60 infrastructure gaps as follows:

- AGA: 11 major infrastructure gaps;
- ATM: 12 gaps;
- CNS: 25 gaps;
- MET: 3 gaps; and

- Air Operators: 9 gaps.

2.3 Traffic forecasts suggest a tripling of passenger volumes and doubling of aircraft movements by 2050. Stakeholders including Member States, the International Air Transport Association (IATA), the African Airlines Association (AFRAA), the Air Traffic and Navigation Services (ATNS), the Agency for Air Navigation Safety in Africa and Madagascar (ASECNA), Airports Council International (ACI) Africa, the African Development Bank (AfDB), the Banjul Accord Group Accident Investigation Agency (BAGAIA), the Banjul Accord Group Aviation Safety Oversight Organisation (BAGASOO), the SatNav Africa Joint Programme Office (SatNav JPO), the Civil Aviation Safety and Security Oversight Agency (CASSOA), the SADC Aviation Safety Organisation (SASO), Roberts Flight Information Region (FIR), Southern Africa Airlines Association and others participated in validation of the outcome of the data collection and gap analysis. Criteria for identifying the infrastructure gaps included safety risk, investment priority, regional impact, and Public-Private Partnership (PPP) potential.

2.4 The World Bank and AfDB gave an undertaking to support bankable projects enumerated from the outcomes of the infrastructure gap analysis exercise. This was based on the prerequisite that such projects meet the minimum requirements established by the financial institutions, though preference will be made to projects undertaken within a framework of several States or regions.

3. CONCLUSION

3.1 The Gap Analysis has provided a strong evidence base for the strategic prioritization of aviation infrastructure investments across Africa. It supports a data-driven approach to planning and mobilizing regional aviation development initiatives.

3.2 A consultant has been engaged to review the report and formulate bankable projects that can be used to attract financing to address the identified infrastructure gaps. This phase of the project was officially launched by AUC, AFCAC and ICAO in February 2025 and is expected to be concluded in August 2025.

3.3 A stakeholder validation workshop will be convened in August 2025, ahead of the formal presentation of the final outcomes of the 2023 Aviation Infrastructure Gap Analysis, to the ministerial meeting of the AUC Specialized Technical Committee (STC) on Transport, Infrastructure, Intercontinental and Interregional Infrastructure, Energy and Tourism scheduled for October 2025.