

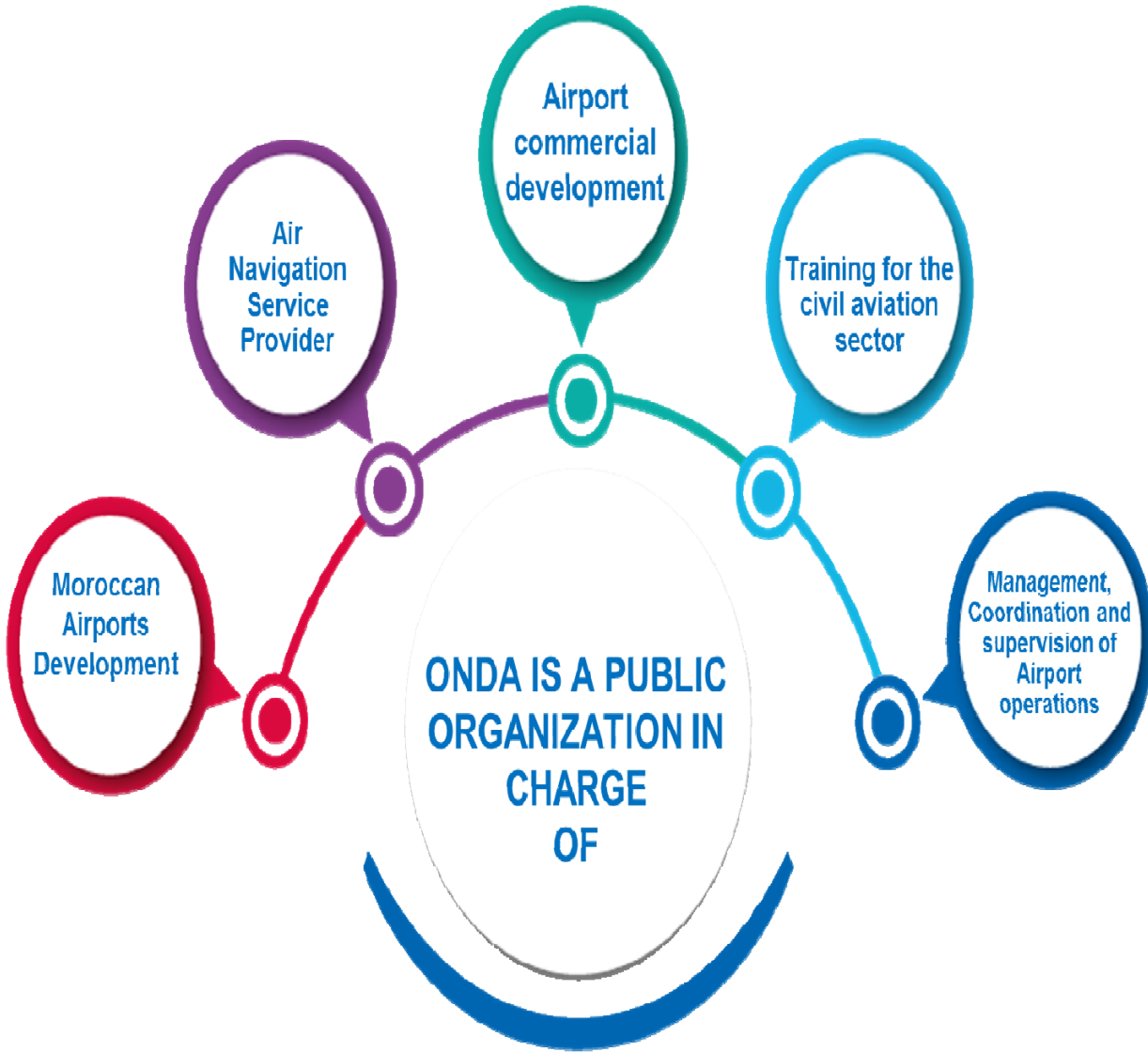
# Moroccan Airports and ANSP Operator



المكتب الوطني للمطارات  
Office National Des Aéroports



# ONDA : Mission



# Airports and ANSP network

## Key numbers

**+20** Passengers Traffic :  
millions in 2017

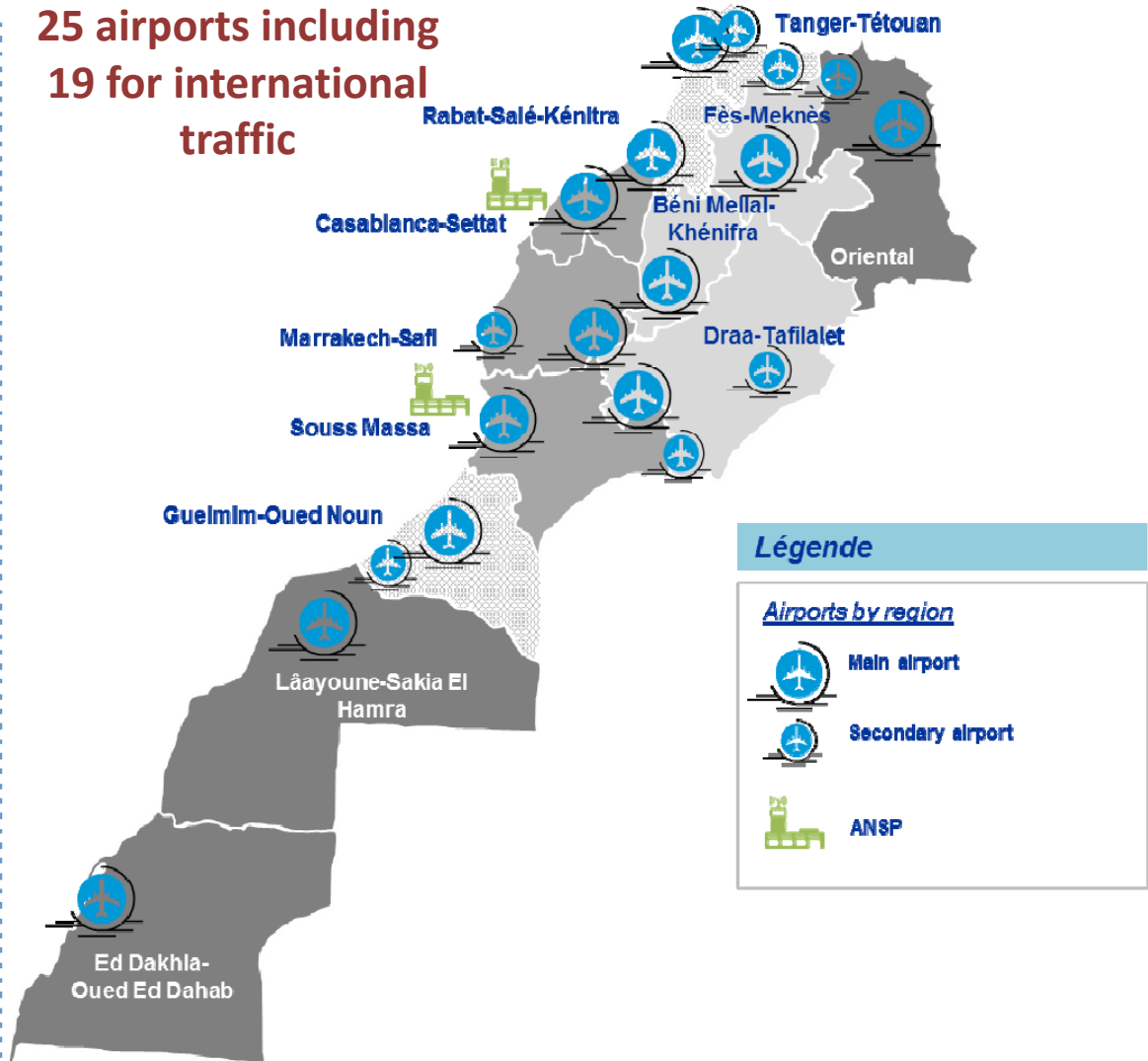


**~3** Billion  
Investment in 2016-2017

**+3,7** Billion MAD  
Turnover in 2017



**25 airports including  
19 for international  
traffic**



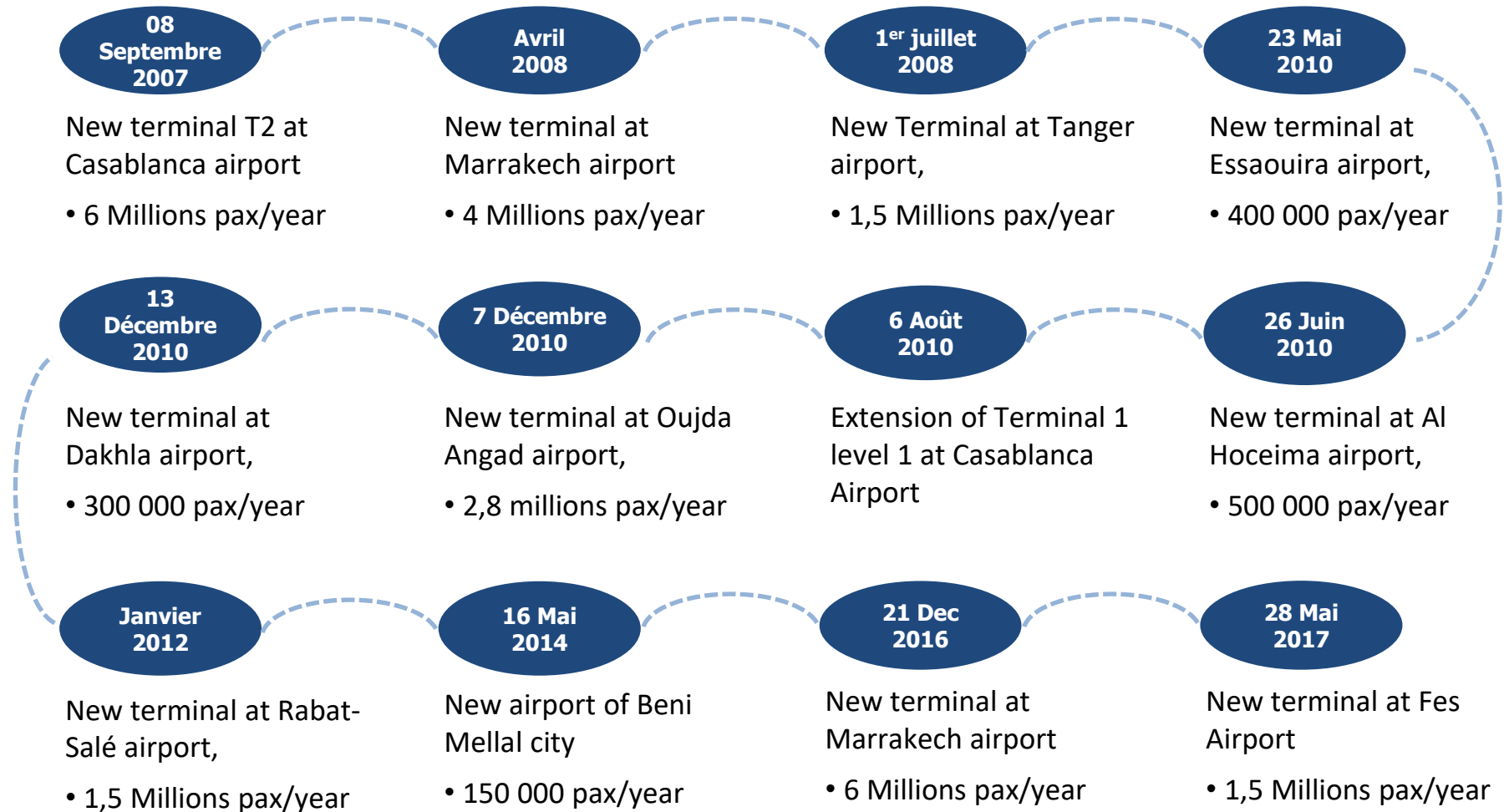
**Légende**

Airports by region

- Main airport
- Secondary airport
- ANSP

Other small airports not represented in the map: BENSLIMANE, BOUARFA, TIT MELLIL, IFRANE, TAROUANT ET TAZA.

# Main investments in Moroccan airports development over the last ten years



# History of pricing changes

	Date	Consultations	Changes
Air Navigation	2011	IATA Study carried in collaboration with EUROCONTROL	+ 2 ↗ euros
Airports	April 2012	IATA	+ ↗ Casablanca - ↘ Other Airports

Since 1997, only two changes in aeronautical charges

# Charge revision process

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**STEP 1**

**Determination of the cost basis for charges**

Analytical allocation of operating and investments costs

**STEP 2**

**User Consultation** : provide information and explanation about

- History and forecasts of passenger traffic
- History and forecasts of Operating Expenses (OPEX)
- Historical and Investment Forecast (CAPEX)
- Proposed return on investment
- Historical and forecast revenues

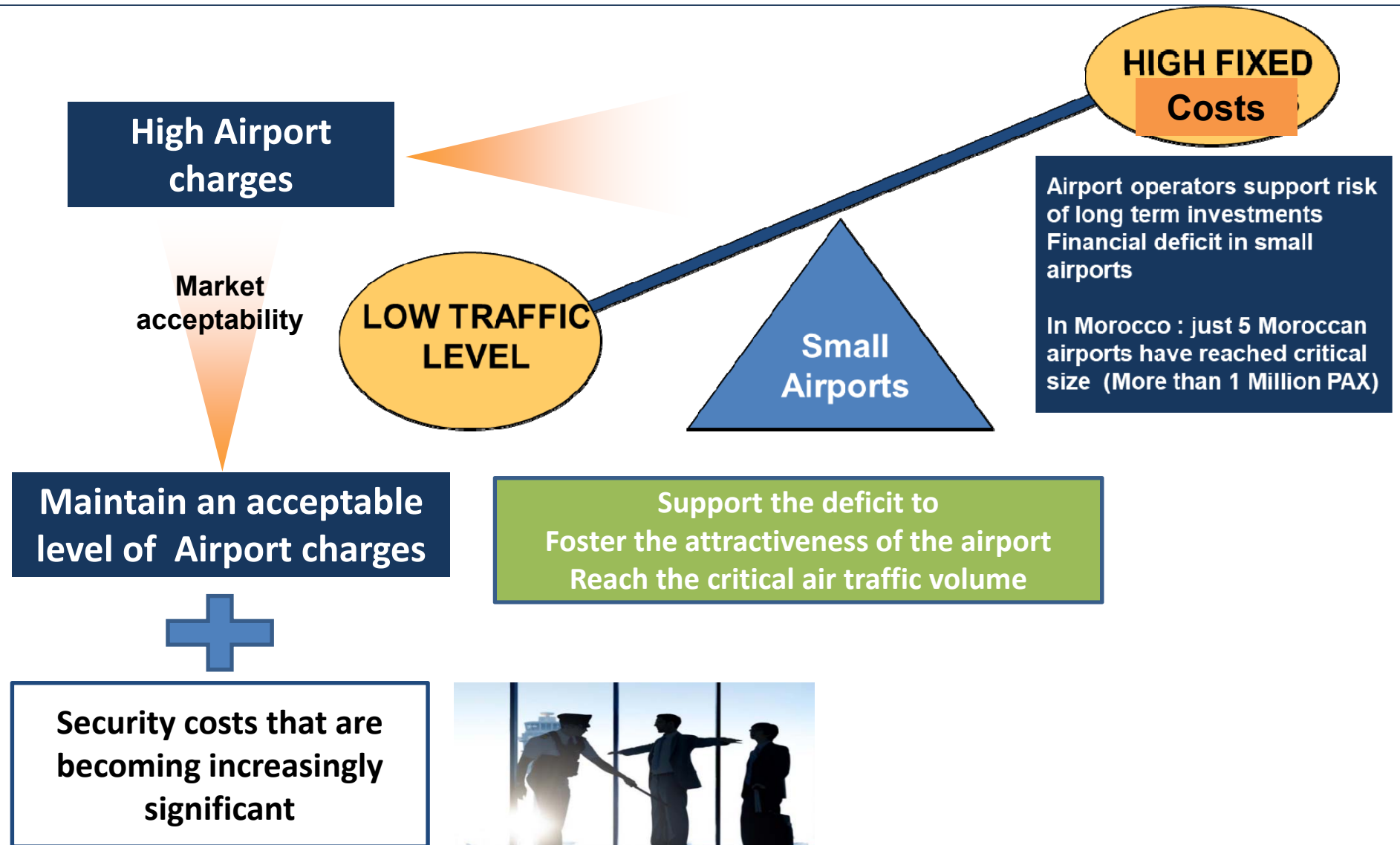
**STEP 3**

ONDA Board Approval of charge change

**STEP 4**

Applying of new charges after some months from the date of user consultation

# Small Airports - Airport Pricing VS Airport Costs Dilemma



# Small Airports - Airport Pricing VS Airport Costs Dilemma

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- ✓ **The development of non aeronautical revenues while they still partially depending on air traffic.**
  - ➔ Adopting New non aeronautical Business Models : walkthrough, Master concession
  - ➔ In some small airports, even commercial revenues could not cover their related charges
- ✓ **Stimulate the creation of new routes and frequencies : Tariff incentives to share the new routes' risk with airlines.**
- ✓ **Partnership development :**
  - Involving local authorities
    - ➔ Already done for the investment in some small airports
    - ➔ Not always easy to do : Financial resources
  - Work with the Tourism office to promote together airports and destinations



# Thank you



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