



ICAO

INTERNATIONAL CIVIL AVIATION ORGANIZATION

Twenty-Seventh Meeting of the Africa-Indian Ocean Planning and Implementation Regional Group (APIRG/27)

5 - 6 November 2024

Agenda Item 3.4: 2023 Aviation Infrastructure Gap Analysis - Updates

(Presented by AFCAC)

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 the implementation of the Single African Air Transport Market (SAATM) Joint Prioritized Action Plan (JPAP), (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. The Data gathering exercise commenced on 27th November 2023 following an awareness and Sensitization Session for Member States and stakeholders held on 2nd November 2023, during which stakeholders were introduced to the Aviation Infrastructure Gap Analysis in Africa, the Questionnaires and Data Gathering Tools to be used. Since the launch of the data-gathering exercise, eight follow-up meetings of the TWG have been convened to provide regular updates on the progress made. The 2nd TWG meeting was convened in Addis Ababa, Ethiopia from 25th to 28th June 2024, where outcomes of data collection, analysis and 25-year traffic forecast were discussed, analyzed and finalized.

Action: The meeting is invited to

- a) take note of the outcomes of the 2023 Aviation Infrastructure Gap Analysis.

<i>Strategic Objectives:</i>	To increase capacity and efficiency of Air Navigation in Africa
<i>Financial implications:</i>	
<i>References:</i>	<ul style="list-style-type: none"> • AFCAC Constitution. • AFCAC 10-Year Strategic Plan (2022-2032) • Concept Note on Aviation Infrastructure Gap Analysis Technical Working Group Workshop • Outcomes of the 2023 Aviation Infrastructure Gap Analysis. • AFCAC Consolidated Strategic Work Programme.



1. INTRODUCTION

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 AU in collaboration with AFCAC and 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.

2. DISCUSSION

2.1 In fulfilment of the foregoing, AFCAC, AUC and ICAO jointly coordinated and convened the 1st Technical Working Group (TWG) meeting to launch the 2023 Aviation Infrastructure Gap Analysis in Africa with a 25-year traffic demand forecast. The meeting was held from 27th to 30th June 2023 in Casablanca, Morocco. The Data gathering exercise commenced on 27th November 2023 following an awareness and Sensitization Session for Member States and stakeholders on held on 2nd November 2023. To achieve the objectives of the Project, a total of eight follow-up meetings of the TWG were convened between November 2023 and April 2024.

2.2 The Infrastructure Gap Analysis covered the entire African continent consisting of 54 African member States. The scope of work included gathering specific data from member States through questionnaires which were responded to as follows:

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

2.3 Among participants at the 2nd TWG meeting, were the AUC, AFCAC, ICAO, IATA, AFRAA, COMESA, BAGASOO, BAGAIA, SASO, CASSOA, ATNS, ASECNA, SATNAV JPO, Roberts FIR, ACI Africa, CANSO Africa, South Africa Airlines Association, Member States representatives and experts from AFCAC, ANS and AGA Experts Working Groups. The meeting discussed outcomes of the data gathering exercise. The following parameters were used in analyzing the data, i.e. Area (Technical), Gap, Objective, Geography (Geographical coverage), Public Private Partnership (PPP), Feasibility, Complexity, Political, Safety Risk, Impact and Criticality (of closing the gap).



- 2.4 The 25-year forecast revealed that, using 2023 as the base year, passenger numbers are expected to triple by 2050 and air traffic numbers are also expected to double by 2050.
- 2.5 The Aviation Infrastructure Gap Analysis Report-2023, highlights infrastructure deficiencies which include at least sixty (60) gaps with the following breakdown:
- AGA – 11 gaps,
 - Air Operators – 9 gaps,
 - ATM – 12 gaps,
 - CNS – 25 gaps, and
 - MET – 3 gaps.
- 2.6 There is need to align and integrate national and/or regional aviation infrastructure programs and plans with an appropriately balanced development of transport modes, including multi-modal and urban planning initiatives, and also link them with national and/or regional development plans and budgets.

3. NEXT STEPS

No.	Action	Lead	Deadline	Status
1	The final report of the Aviation Infrastructure Gap Analysis to be shared with States to prepare for the Stakeholder Validation Workshop.	AFCAC	2 nd Week of October 2024	Done
2	Finalise procurement of a consultant to facilitate the elaboration of bankable projects	AUC	4 th Quarter 2024	Pending
3	Convene 3 rd TWG Physical meeting to discuss the bankable projects, including capacity building on elaboration of bankable projects	AUC	1st Quarter 2025 (March)	Pending
4	Convene the Stakeholder Validation workshop regarding the Aviation Infrastructure Gap Analysis.	AUC	1 st Quarter of 2025	Pending
5	ICAO to consider and develop an interactive dashboard on the gap analysis profile for each State.	ICAO	Continuous	Pending

4. CONCLUSION

Key outcomes of the infrastructure data analysis exercise and the identified gaps will be used to develop bankable projects to close the gaps in support of the seamless airspace and ANS architecture for Africa and SAATM. Member States are encouraged to consider outcomes of the infrastructure gap analysis and develop national and regional interventions to the implementation of the ANS Master Strategy in the short-term, medium-term, and long term.

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