

# 3rd PIDA WEEK 2017

## THE SINGLE AFRICAN TRANSPORT MARKET

WALVIS BAY, NAMIBIA

10 - 14 DECEMBER 2017

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REPRESENTATIVE OF SOUTH  
AFRICA

TO THE COUNCIL OF ICAO



# A Single Air Transport Market for Africa

“ A milestone in the  
development of Air  
Transport and aviation on  
our continent ”



# Benefits Of the Single Air Transport Market For Africa

- Air Service connectivity;
- Over 25% low fares;
- Creation Jobs for the Youths;
- Integration – Bringing Africa Together;
- Convenience;
- Time Saving;
- Enhanced intra-African Trade (CFTA).



# Benefits Of the Single Air Transport Market For Africa



- Contribution to tourism growth;
- The survival of African Airlines;
- Contribution to National GDP;
- Contribution to African Integration;

# Aviation Milestones achieved by Africa to date

## AVIATION SAFETY:

- A safe, secure and sustainable global aviation system;
- Effective implementation of global standards and policies;
- Provides efficient access to the global market;
- Implementation of ICAO global aviation standards and policies;
- Support of sustainable development and socio-economic prosperity;
- Creation and preserve friendship and understanding among the nations and peoples of the world.



# Aviation Milestones achieved by Africa to date

## AVIATION SECURITY:

- Bold step to address aviation security and facilitation challenges;
- Ministerial meeting developed: “Declaration on Aviation Security and Facilitation with highlight:

**Ensure political commitment at national, regional and continental level for aviation security and facilitation**



# Aviation Milestones achieved by Africa to date

## AVIATION SECURITY:

- Endorsement of the Africa and Middle East Aviation Security Roadmap by Ministerial Conference on Aviation Security;
- Basis for the work to be carried out by the relevant regional AVSEC/FAL Groups;
- In line with the Global Aviation Security Plan (GASeP).



# Aviation Milestones achieved by Africa to date

## AVIATION SECURITY:

### Roadmap - six key priorities:

- Enhance risk awareness and assessment;
- Develop security culture;
- Develop human capability in Aviation Security;
- Improve technological resources and encourage innovation;
- Improve oversight and quality control; and
- Increase regional cooperation and support.





# Aviation Milestones achieved by Africa to date

## AVIATION SECURITY:

- Roadmap is a “living” document aligned with the GAsEP;
- With consideration the following AVSEC Declarations:
  - Windhoek Declaration on Aviation Security and Facilitation, (7 April 2016)
  - Riyadh Declaration on Aviation Security and Facilitation, (31 August 2016)
  - Dubai Declaration on Cyber Security, (4 April 2017)



# AIR TRANSPORT

## Positive statements from IWAF 2

- Enhance the partnership and financing required to accelerate the implementation of international civil;
- Ensure sufficient resources for sustainable aviation development;
- Reaffirm the need for strong, long-term partnerships into the NCLB initiative.



# Air Transport

## IWAF 2 -

- Emphasized the urgent need to strengthen capacity for States to develop business cases and analyze high-quality disaggregated aviation data;
- Welcomed the work of the United Nations Secretary-General's High-Level Advisory Group on Sustainable Transport;
- highlighting the need to:
  - Integrate all sustainable transport planning efforts with a balanced development of transport modes,
  - Foster an informed, engaged public as a crucial partner in advancing sustainable transport solution.



# Air Transport

## IWAF 2 -

- **Participants emphasized:**
  - **aviation system has a significant impact on the economic development and growth;**
  - **it impacts tourism and trade;**
  - **generates other economic benefits;**
  - **which help to eradicate poverty;**
  - **Create jobs;**
  - **mobilize resources.**



# AIR TRANSPORT

- ICAO encourages States to:
- Establish autonomous entities to operate airports and/or air navigation services;
- Airports and air navigation services that are operated by autonomous entities demonstrate improved overall financial situation and managerial efficiency.



# AIR TRANSPORT ACTIVITY

Since 2016:

- Revenue Passenger Kilometres (RPK) have grown by 6.9%;
- Freight Tonne- Kilometers (FTK) has grown by 2.8%;
- Top 15 carriers accounted for 85.6 % of the traffic performed by African airlines;
- Ethiopian Airlines still the largest African airline in 2016, (+15.4%)
- Cargo traffic performed by African carriers recorded a growth of +2.8%
- Air freight market of African carriers of Ethiopia, South Africa and Egypt, accounting for 78.7% of the African traffic (21.3%)



# AIR TRANSPORT ACTIVITY

Since 2016:

- African airlines increased their capacity in ASK by +7.0% ;
- Air Transport supports 6.8 million jobs and \$72.5 billion in GDP Africa;
- Tourists in the region accounts for USD 46 billion of the total economic impact;
- The African Union Single Air Transport Market for Africa will unlock this even further;
- It is an open skies for Africa, for African Airlines and African Aviation by Africans.



# AIR TRANSPORT ACTIVITY

## Single Air Transport Market for Africa:

- Part of the AU Agenda 2063 -
- A strategic framework for the socio-economic transformation of the continent over the next 50 years.
- Builds on, and seeks to accelerate the implementation of past and existing continental initiatives for growth and sustainable development.





# ENVIRONMENT

- Adoption of the United Nations 2030 Agenda for Sustainable Development;
- Emphasized that ICAO's current Strategic Objectives are strongly linked to 13 of the 17 Sustainable Development Goals (SDGs);
- Recognized the special needs and structural characteristics of Small Island Developing States (SIDS) and Landlocked Developing Countries (LLDCS);
- Least Developed Countries (LDCs);



# AVIATION INFRASTRUCTURE

Acting MD of Air Namibia – when asked if African infrastructure can support efforts to further improve customer services:

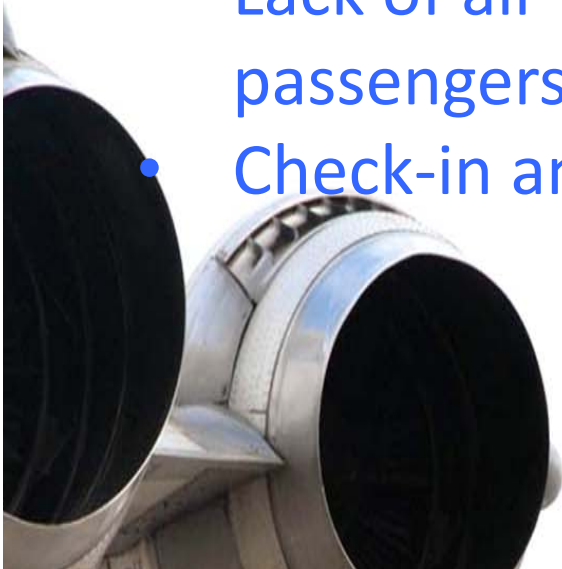
“There are some airports in the region – O.R. Tambo in Johannesburg – that have spent large amounts of funds to maintain international standards”.



# AVIATION INFRASTRUCTURE

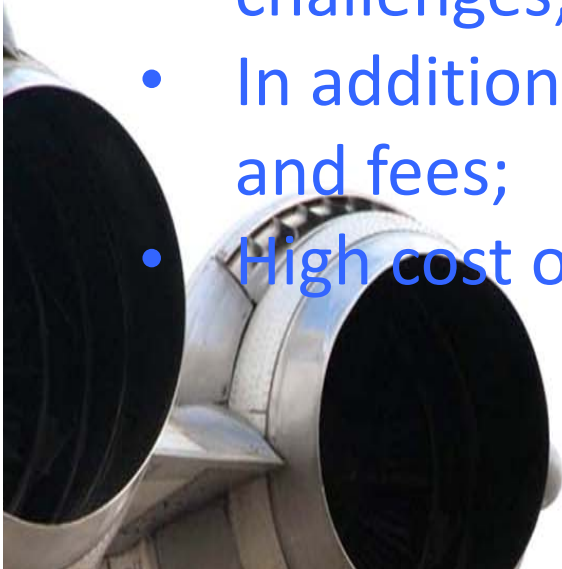
Africa - including Namibia:

- Greater investment is needed to secure a better customer experience;
- Lack of air bridges cause inconveniences to passengers during rainy season;
- Check-in and boarding is done manually;



# AVIATION INFRASTRUCTURE

- The need to offer a degree of self-service in the modern age - at a cost;
- Investment to pay off in the longer term;
- CEO of LAM Mozambique (Mr. Antonio Pinto) cited safety, security and infrastructure challenges;
- In addition, lack of facilities- High airport taxes and fees;
- High cost of borrowing for African airlines.



# AVIATION INFRASTRUCTURE

According to EASA:

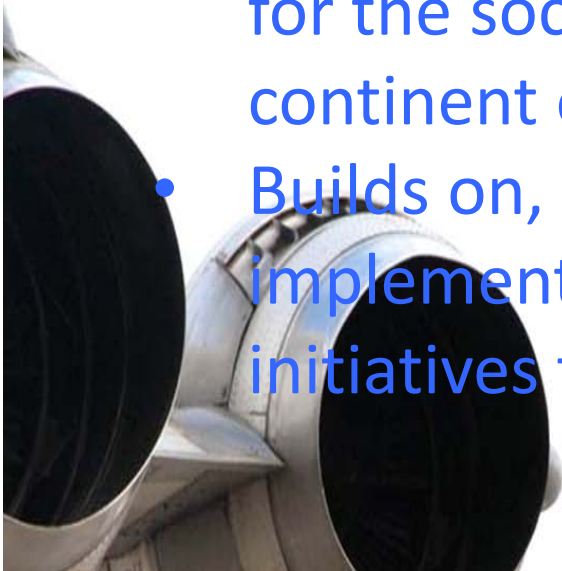
- Airspace modernization in Europe - create 1 million extra jobs by 2035;
- Provide a 245 billion Euro boost to the economy;

Where is Africa?

- UNICEF predicts that a quarter of the world will be African by 2050 (2.5 Billion);
- If Africa does nothing about this projection, this will lead to rising poverty, marginalization and instability.

# AVIATION INFRASTRUCTURE

- PIDA inclusion of aviation in its program- a step in the right direction;
- Aviation and other industries will ensure that Africa is moving with the times;
- Part of the AU Agenda 2063 - A strategic framework for the socio-economic transformation of the continent over the next 50 years;
- Builds on, and seeks to accelerate the implementation of past and existing continental initiatives for growth and sustainable development.





**Thank You**

