Africa Infrastructure Study
Air Transport

Preliminary Findings:
Service Provision
Infrastructure

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African Development Bank
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Presentation Content

1. The Air Transport Network in Africa
2. Preliminary Infrastructure Findings
3. Thematic Approach to Air Transport at the World Bank
African Air Service Provision

Highest number of Capacity offered

#1: Johannesburg 275,400 Seats per Week
#2: Cairo 170,800 Seats per Week
#3: Capetown 113,100 Seats per Week
#4: Casablanca 85,100 Seats per Week
#5: Nairobi 81,500 Seats per Week
#6: Lagos 74,900 Seats per Week
#7: Algiers 62,100 Seats per Week
#8: Addis Ababa 57,700 Seats per Week
#9: Durban 56,700 Seats per Week
#10: Tunis 82,700 Seats per Week
African Air Service Provision

Overall Network

- > 50,000
- > 20,000 and < 50,000
- > 10,000 and < 20,000
- > 2,000 and < 10,000
- > 1,000 and < 2,000
- Below 1,000
African Air Service Provision
Highest Domestic Capacity Offered

#1: South Africa 343,000 seats per week, 43.9% of total
#2: Egypt 90,000 seats per week, 11.5% of total
#3: Nigeria 75,000 seats per week, 9.6% of total
#4: Algeria 44,700 seats per week, 5.7% of total
#5: Morocco 34,900 seats per week, 4.5% of total
#6: Tanzania 32,900 seats per week, 4.2% of total
#7: Mozambique 27,200 seats per week, 3.5% of total
#8: Kenya 22,700 seats per week, 1.9% of total
#9: Madagascar 15,200 seats per week, 1.9% of total
#10: Angola 14,900 seats per week, 1.9% of total
African Air Service Provision
African Passenger “Hubs”

#1: Johannesburg 65,300 seats per week, 11.8% of total 42 city pairs

#2: Nairobi 46,000 seats per week, 8.3% of total 40 city pairs

#3: Cairo 34,500 seats per week, 6.22% 26 city pairs

#4: Addis Ababa 32,200 seats per week, 5.8% of total 30 city pairs

#5: Casablanca 18,400 seats per week, 3.3% of total 21 city pairs

#6: Dakar 17,000 seats per week, 3.1% of total 20 city pairs

#7: Abidjan 16,900 seats per week, 3.1% of total 20 city pairs

#8: Lagos 16,600 seats per week, 3.0% of total 18 city pairs

#9: Accra 15,800 seats per week, 2.9% of total 17 city pairs
African Air Service Provision
Intercontinental Entry Points

#1: Cairo
104,000 seats per week, 13.71%
39 city pairs

#2: Johannesburg
66,800 seats per week, 8.8% of total
31 city pairs

#3: Casablanca
50,800 seats per week, 6.7% of total
42 city pairs

#4: Tunis
40,900 seats per week, 5.4% of total
35 city pairs

#5: Algiers
35,200 seats per week, 4.7% of total
27 city pairs

#6: Marrakech
34,800 seats per week, 4.6% of total
32 city pairs

#7: Hurghada
29,600 seats per week, 3.9% of total
30 city pairs

#8: Sharm El Sheikh
48,400 seats per week, 3.74% of total
41 city pairs

#9: Nairobi
26,800 seats per week, 3.5% of total
16 city pairs

#10: Mauritius
25,700 seats per week, 3.5% of total
15 city pairs

#11: Addis Ababa
24,500 seats per week, 3.2% of total
19 city pairs

#12: Lagos
24,300 seats per week, 3.2% of total
19 city pairs

#13: Capetown
22,000 seats per week, 2.9% of total
11 city pairs

#14: Dakar
16,900 seats per week, 2.2% of total
14 city pairs
African Air Service Provision
Intercontinental Country Pairs – Top 30

Note: Thickness corresponds to relative volume. Total intercontinental capacity: 740,000 for Sept. 07
African Air Service Provision - SSA
Intercontinental Country Pairs – Top 30

Note: Thickness corresponds to relative volume. Total intercontinental capacity: 740,000 for Sept. 07.
African Air Service Provision
Inter-African Capacity, SSA
• **State of Returns**: So far, 13 questionnaires have been returned. Of those, two still need additional data. Eight are expected within the next few days, with the remainder following later.

• A caution: Often one hears of talk about what African air transport needs – it should be noted that the countries vary widely individually in their needs. It is best to speak more about individual countries than Africa (or Sub-Saharan Africa) as a whole.
• A couple of more common themes emerge from the questionnaire:
  • Air traffic control infrastructure, expertise, and procedures
  • Communications coverage (an IATA favorite)
• A few more questions need to be asked in the future as a follow-up on the questionnaire, including specifically oversight capacity in terms of inspectors.
## Questionnaire Returns - Highlights

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<td>In part</td>
<td>Yes</td>
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<td>Cape Verde</td>
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<td>Tanzania</td>
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## 10 PPIs since 1996

<table>
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<tr>
<th>Country</th>
<th>Project</th>
<th>Type</th>
<th>Notes</th>
<th>Year</th>
<th>Duration</th>
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<tbody>
<tr>
<td>Cameroon</td>
<td>Aeroports du Cameroon</td>
<td>Concession</td>
<td>Build, Rehab. &amp; operate runways and terminals in 7 airports</td>
<td>1993</td>
<td>20 years</td>
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<td>Côte d'Ivoire</td>
<td>Abidjan International Airport</td>
<td>Concession</td>
<td>Rehab. &amp; operate runways and terminals</td>
<td>1996</td>
<td>15 years</td>
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<td>Kenya</td>
<td>Jomo Kenyatta Airport Cargo Terminal</td>
<td>Greenfield</td>
<td>Build, own, and operate</td>
<td>1998</td>
<td>N/A</td>
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<tr>
<td>Madagascar</td>
<td>Aeroports de Madagascar (ADEMA)</td>
<td>Concession</td>
<td>Rehabilitate, operate, and transfer runway &amp; terminal 12 airports</td>
<td>1991</td>
<td>15 years (ended 2006)</td>
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<td>Mauritius</td>
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<td>Management and lease contract</td>
<td>Runway and terminal</td>
<td>1999</td>
<td>5 years (ended 2004)</td>
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<td>Runway and terminal</td>
<td>1998</td>
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<td>Runway and Terminal</td>
<td>2000</td>
<td>N/A</td>
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<tr>
<td>South Africa</td>
<td>Rand Airport</td>
<td>Divestiture (partial)</td>
<td>Runway and Terminal</td>
<td>2000</td>
<td>N/A</td>
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<tr>
<td>South Africa</td>
<td>Mpumalanga Airport</td>
<td>Greenfield</td>
<td>Build, own, and operate runway &amp; terminal</td>
<td>2001</td>
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<tr>
<td>Tanzania</td>
<td>Kilimanjaro International Airport</td>
<td>Concession</td>
<td>Rehabilitate, operate, and transfer runway &amp; terminal</td>
<td>1998</td>
<td>25 years</td>
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</table>
Private Sector – the IFC

• The IFC has a roughly $357 million portfolio in air transport projects. Included are items such as
  • Airlines (Volga Dnepr, GOL in Brazil, LAN Chile, Jet Airways in India, Kenya Airlines, etc)
  • Manufacturers (e.g. Embraer)
  • Airports (eg. Georgia, Philpinnes, Cambodia, Costa Tica)
• All of these are generally private sector transactions
Air Transport at the World Bank
Mission Statement

• **Overall Goal**: Develop safe, secure, reliable, cost-effective and environmentally responsible air transport services to improve accessibility and affordability for all sections of the population, in support of social and economic growth.
Air Transport Project Activities
Thematic Focus of Air Transport

- **Infrastructure**: Adequate air transport infrastructure as a necessary condition (ICAO SARP)
- **CAA Oversight Capacity Building and Equipment**
  - **Air Transport Safety**: not a public health issue, but:
    - High accident rates – high cost (insurance, financing, code sharing)
  - **Air Transport Security**: not law enforcement issue:
    - Non-compliance will hinder access to international markets (USA, Europe)
- **Economic Regulation** for liberalization, especially for dispute settlement and competition rules
Air Transport Project Activities

Air Transport Focus

• Policy advice and knowledge transfer: regulatory reforms (aviation code, regulations), capacity building (CAA), airline restructuring and privatization, commercialization of airport operations.

• Partnerships: ICAO, FAA, EU on projects (funding, T/A) and policy implementation.

• Financing of Infrastructure: airports, runways, CNS equipment, GNSS, security equipment (fencing etc.).

• Private Sector Funding: aircraft acquisition (IFC), foreign investment guarantee (MIGA).
Cooperation with Partners & Donors

Technical Cooperation

- **International Organizations**: ICAO (regulations and standards, technical advice, training)
- **Bi-lateral partners**: FAA (technical support, training), French CAA (capacity building), Canada, Netherlands
- **Regional organizations**: Safety and Security projects (ACSA, COSCAP), Liberalization & economic regulation (e.g. UEMOA and ECOWAS W& C Africa)
- **Private sector** consultants, suppliers, and industry organizations (e.g. ACI, ATAG, IATA)
Thank You!