



INTERNATIONAL CIVIL AVIATION ORGANIZATION  
WESTERN AND CENTRAL AFRICAN OFFICE

First Meeting of the APIRG Airspace and Aerodrome Operations Sub-Group  
(AAO SG/1)

(Dakar, Senegal, 29 to 31 May 2017)

Agenda Item 6: AFI Air Navigation Deficiencies Database

AIR NAVIGATION INFRASTRUCTURE GAP ANALYSIS

(Presented by the Secretariat)

SUMMARY
<p>This working paper presents the 3<sup>rd</sup> ICAO World Aviation Forum (IWAF) which will be hosted by Nigeria in November 2017 with the theme, “Financing the Development of Aviation Infrastructure”. The paper is to raise awareness of the need for AFI States to take advantage of the opportunities provided by the forum in order to address gaps in the current and planned ANS infrastructure.</p> <p>Action by the meeting is at <b>paragraph 3</b>.</p>
<p><b>REFERENCES:</b></p> <p>– IWAF -1 and IWAF-2 Communique</p>
<p>This Working Paper is related to Strategic Objectives: <b>A &amp; B</b></p>

1. INTRODUCTION

1.1 The ICAO World Aviation Forum (IWAF) is designed for high-level government officials responsible for transport and infrastructure, finance, economy, and tourism; and key industry and financial partners. The objective of IWAF is to identify needs, facilitate the funding and financing required to accelerate the implementation of international civil aviation global standards and policies in support of the No Country Left Behind (NCLB) initiative, and to share information and best practices with a view to ensuring sufficient resources for sustainable aviation development.

1.2 The third IWAF is themed “*Financing the Development of Aviation Infrastructure*” and will be hosted by Nigeria in November 2017.

2. DISCUSSION

2.1 With the air transport sector poised to double in flight and passenger volumes over the next 15 years, significant investment commitments will be required towards new

**AAO SG/1  
WP/13**

airport and air navigation infrastructure and other air transport capacities. ICAO considers it critical to bring together these players now in order to anticipate these challenges in greater detail, and to raise awareness on the critical importance of aviation and global connectivity to the future prosperity of societies and economies all over the world.

2.2 ICAO has already begun highlighting a number of these issues under the No Country Left Behind campaign it launched at the end of 2014. ICAO is seeking to make clear that the continued safety and efficiency of global aviation, critical to a wide range of citizens and economic sectors, requires coordinated assistance for States in need and determined commitment on behalf of governments, industry and the development community in the years ahead.

2.3 In light of its cross-cutting nature and multiple links to other economic sectors, the total economic impact of aviation reaches some 3.5 per cent of world GDP, equivalent to 2.4 trillion dollars, while supporting some 58.1 million jobs. As States all over the world are now working together to realize the social, economic and environmental priorities reflected in the recently-adopted UN Sustainable Development Goals, ICAO recognized that the fundamental role of safe and reliable aviation as an engine for socio-economic prosperity needed to be re-emphasized so that it's benefits can contribute to that process."

2.4 Aviation development refers to a wide range of infrastructure, human resources, training, and related capacity-building activities. The ultimate goal of these efforts is to realize a safe and efficient air transport foundation in a given State, one which is consistent with ICAO's Standards and Recommended Practices (SARPs) and Strategic Objectives for the global air transport network.

2.5 Once ICAO-compliant air transport connectivity is established, it begins to support expanded tourism and many other local and regional socio-economic development goals for States and Regions. Opportunities for local citizens, businesses and producers to access foreign supplies and markets begin to multiply significantly, and further important benefits for governments and societies are realized through improvements in medical transport, emergency response and cultural exchange.

2.6 Recognizing the importance of aviation development to ICAO's global mandate and the new UN Sustainable Development Goals (SDGs), the Organization has begun to more actively engage States and donor/development stakeholders and to map its work against SDG deliverables. ICAO does so not only by serving an essential coordinating role, but also by providing States with the planning and monitoring tools they need to develop practical and effective business cases supporting dependable socio-economic returns on investment.

2.7 Today, despite the collapse of global commodity prices and political shocks that have slowed growth in North Africa, Africa's economic lions are still moving forward. Overall, the continent achieved average real annual GDP growth of 5.4% between 2000 and 2010, adding \$78 billion annually to GDP (in 2015 prices). The compiled list of 13 countries with the highest projected compounded annual growth rate (CAGR) from 2014 through 2017 based on the forecasts from the World Bank's Global Economic Prospects includes six (6) African States. (Source: <http://uk.businessinsider.com/world-bank-fast-growing-global-economies-2015-6/#-china-1> )

2.8 The positive economic outlook of Africa and the projected growth will include

**AAO SG/1  
WP/13**

a significant growth of the air transport industry, which will have a substantial impact on the capacity of existing air navigation infrastructure and services.

2.9 It will be recalled that the APIRG/19, under Conclusion 19/06 adopted the AFI Regional Air Navigation System Implementation Action Plan Aligned with the ICAO Aviation System Block Upgrades (ASBUs). The State and regional planning and implementation monitoring tool within the framework of APIRG is the Air Navigation Reporting Form (ANRF), which as you may recall, replaced the Performance Framework Form (PFF). To this end, the APIRG.20 Meeting formulated Conclusion 20/05: Status of Implementation of ASBU Block 0 Modules, inter alia, calling on States to provide information on the status of implementation of ASBU modules using the Air Navigation Reporting Forms (ANRFs) or other reporting tools as may be provided, at least twice a year.

2.10 Currently, substantial gaps exist in the provision of air navigation infrastructure and services. These gaps in ANS infrastructure have become more significant and a major source of concern for a successful and timely implementation of the ASBU modules in GANP.

2.11 The 3<sup>rd</sup> IWAF which will be held in Africa for the first time therefore offers a huge and timely opportunity for Africa to address some of the critical ANS infrastructure gaps, and in some cases provide the required resources to leapfrog into the implementation of new technologies and services associated with the implementation of the GANP.

2.12 It is notable however, that the flow of information on the status of implementation of the ASBU has been significantly low. In order to present the true region-wide picture of the gaps in ANS infrastructure, it is necessary for States to conduct assessment of their infrastructure requirements and identify areas whereby the assistance may be required, particularly in the implementation of the GANP.

**3. ACTION BY THE MEETING**

The meeting is invited to:

- a) Discuss and agree on the modalities for assessing ANS infrastructure gaps in implementation of the GANP;
- b) Take note of the IWAF and ensure that the infrastructural needs of States in the implementation of GANP are presented; and
- c) Review and propose further action.

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