ACI Africa, the Voice of African Airports

Time to fly again

Better Skies for Africa
# Impact on Passenger Traffic in 2020

<table>
<thead>
<tr>
<th>Million Pax</th>
<th>Jan-Mar</th>
<th>Apr-Jun</th>
<th>Jul-Sep</th>
<th>Oct-Dec</th>
<th>Year 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forecasted (Pre-COVID-19)</td>
<td>55</td>
<td>58</td>
<td>68</td>
<td>61</td>
<td>242</td>
</tr>
<tr>
<td>Estimated under COVID-19</td>
<td>45</td>
<td>2</td>
<td>16</td>
<td>31</td>
<td>93</td>
</tr>
<tr>
<td>Reduction</td>
<td>-10</td>
<td>-56</td>
<td>-52</td>
<td>-31</td>
<td>-149</td>
</tr>
<tr>
<td>% Change</td>
<td>-18%</td>
<td>-97%</td>
<td>-76%</td>
<td>-50%</td>
<td>-62%</td>
</tr>
</tbody>
</table>
High - A faster launch of a potential vaccine that can easily be mass-produced.

Low - Pessimistic turn of events: unsuccessful vaccine research, a large second wave resurfacing across the globe, supply side shocks such as escalating aviation-related bankruptcies, a deepening economic crisis.
2020 – 2028 Passengers Traffic Forecast

Back to 2019 passenger volumes

Uncertainty

- BAU forecast
- Projection
- Historical data
ACI Africa’s Guidance for Restart

ACI Africa Restart Guidance in French and English

The guidelines consist of six key pillars, namely:

1. Airport preparedness
2. Staff motivation
3. Healthy airport measures
4. Healthy airport experience
5. Financial sustainability
6. Communication
ACI Airport Health Accreditation

- To assist airport members to comply with the new health measures
- To further reinforce the confidence of passengers in the process and infrastructure put in place
- The Airport Health Accreditation (AHA) programme provides airports with an assessment of how aligned their health measures are with the ACI Aviation Business Restart and Recovery guidelines and ICAO Council Aviation Recovery Task Force (CART) Recommendations along with industry best practices.
- 47 airports from 25 States have expressed interest to join the program
- 29 airports have started the process
- 4 airports from 3 countries have received the accreditation

Airport Health Accreditation in Africa
To help airports communicate with passengers, ACI has developed an app to help passengers directly access information about the measures in place at individual airports.

- **Check & Fly App**

- The free app can be found on the [Apple App Store](https://apps.apple.com).

- Web-based portal [https://api.acris.aero/check_and_fly/COVID19/v1/](https://api.acris.aero/check_and_fly/COVID19/v1/)
### African Airport Revenues

<table>
<thead>
<tr>
<th>Million USD</th>
<th>Jan-Mar</th>
<th>Apr-Jun</th>
<th>Jul-Sep</th>
<th>Oct-Dec</th>
<th>Year 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Forecasted (Pre-COVID-19)</strong></td>
<td>1,000</td>
<td>1,000</td>
<td>1,200</td>
<td>1,100</td>
<td>4,300</td>
</tr>
<tr>
<td><strong>Estimated under COVID-19</strong></td>
<td>800</td>
<td>30</td>
<td>300</td>
<td>600</td>
<td>1,730</td>
</tr>
<tr>
<td><strong>Reduction</strong></td>
<td>-200</td>
<td>-970</td>
<td>-900</td>
<td>-500</td>
<td>-2,570</td>
</tr>
<tr>
<td><strong>% Change</strong></td>
<td>-20%</td>
<td>-97%</td>
<td>-75%</td>
<td>-45%</td>
<td>-60%</td>
</tr>
</tbody>
</table>
States support to alleviate the financial impact is a condition to the recovery:

- Ensuring access to finance, e.g. government loan guarantees or funding of debt
- Waiving airport concession fees
- Tax relief for the aviation sector
- Providing government assistance, e.g. subsidies and grants
- Bearing costs of public health measures
Depending on local circumstances:

- Temporary discounts or rebates on charges to support the recovery of traffic and for traffic development

- Deferral mechanisms: airport charges could potentially be deferred and be recovered over a period of years and at an interest rate to be determined or negotiated.
ACI’s Advocacy for Testing in lieu of Quarantine

- ACI Africa calls for widespread deployment of testing to foster international travel in Africa
- Adoption of consistent, risk-based and harmonized health protocols
- Implementation of internationally agreed and recognized COVID-19 testing
- Removal of cumbersome quarantine measures
- Quarantine and unilateral decisions from governments are destroying efforts from industry players to restore air connectivity.
Time to Fly Again

Restoring confidence in Travel
Thank You

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About ACI-Africa

ACI Africa is the international association of African airports. It is the voice of African Airports and has as prime objective to advance the interests of airports and to promote professional excellence in airport management and operations on the African continent. ACI Africa is composed of 67 members from 53 African countries, managing more than 260 airports, and of 44 business partners.

ACI Africa Website: https://www.aci-africa.aero/