



**13<sup>th</sup> AVIATION  
STAKEHOLDERS  
CONVENTION**  
11-13 May 2025 | Kigali, Rwanda



# Monday 12 May

## Sustainability. Collaborate. Innovate

Better Skies for Africa





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11-13 May 2025 | Kigali, Rwanda



# Opening Ceremony



**Opening remarks**  
**Mr. Abdérahmane Berthé, Secretary**  
**General - AFRAA**

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# Opening Ceremony



**Welcome from the Host  
Ms. Yvonne Makolo, Chief Executive  
Officer – RwandAir**

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# Opening Ceremony



**Official Opening by the Guest of  
Honor - Dr. Edouard Ngirente, Prime  
Minister of the Republic of Rwanda**

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13-15 May 2025 | Kigali, Rwanda  
**RwandAir**  
By the name of Africa

# Networking Coffee Break

**9:40 – 10:10 hrs**

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AFRAA  
**RwandAir**  
*For the skies of Africa*



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*Better Skies for Africa*



# **Executive punchline: Sustainability. Collaborate. Innovate**



**Mr. Steven  
Polmans, Board  
Chairman - the  
International  
Air Cargo  
Association  
(IATA)**



**Mr. Aaron  
Munetsi  
Chief Executive  
Officer -  
Airlines  
Association of  
Southern Africa  
(AASA)**



**Raphael Kuuchi -  
AFRAA  
Consulting  
Director  
Government,  
Legal & Industry  
Affairs**

**Moderator**

# Presentation 1

## Transforming Rwanda into a global hub through investment, innovation and enhanced connectivity



**Ms. Irene Murerwa,**  
**Chief Tourism Officer -**  
**Rwanda Development**  
**Board**

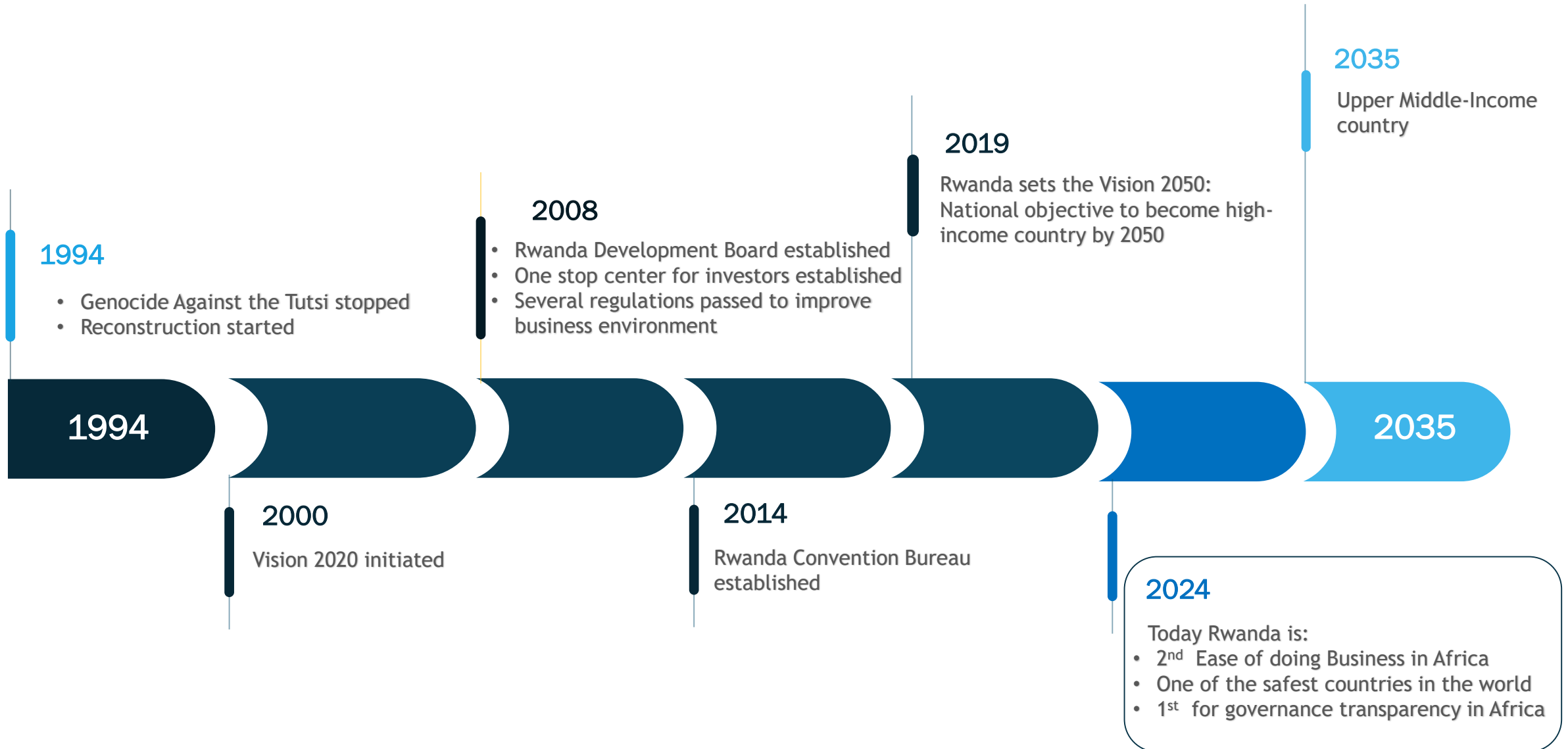
Better Skies for Africa



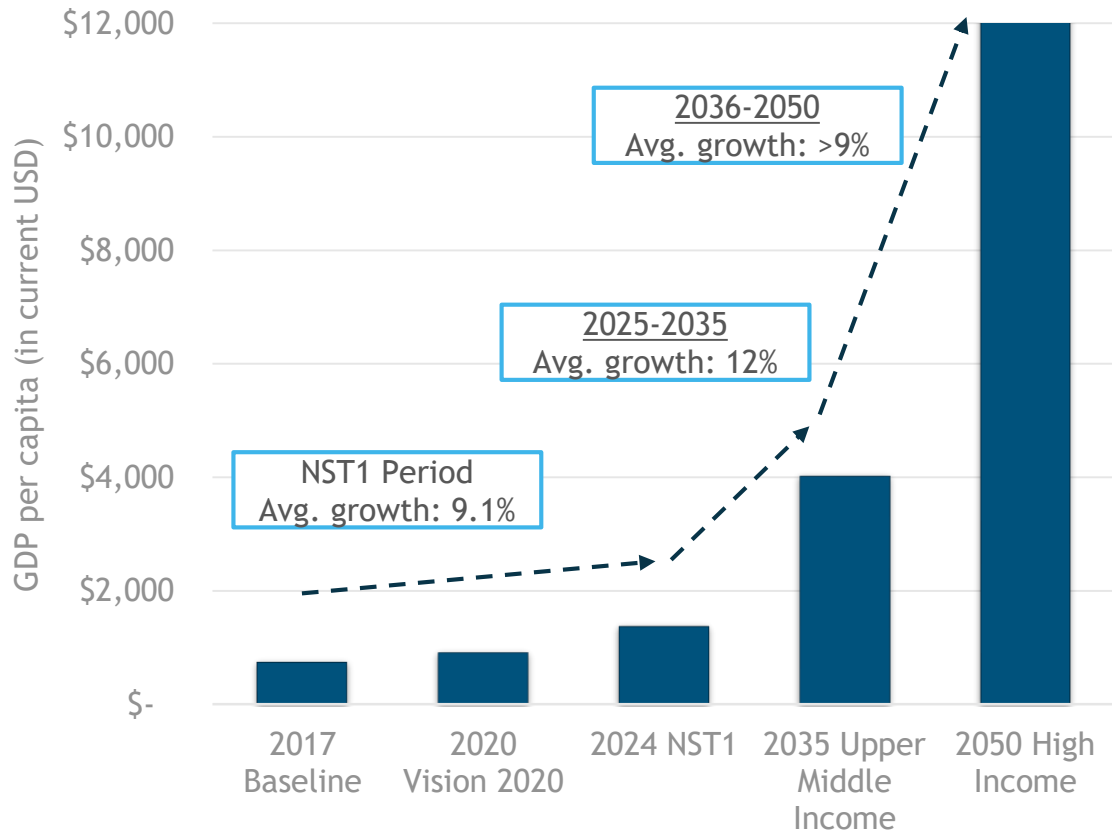


# THE RWANDA OPPORTUNITY

# Rwanda's Journey - Honouring The Past & Shaping The Future



# Rwanda has set targets to be a high-income country **By 2050**



Services & Exports will play a key role in achieving NST2 (2024-2029) targets



Source: Vision 2050, NST2, NST1

# Over 20 Years(2003-2023), Rwanda's GDP Grew 14-fold...



## 2003- 2023

- Rwanda's GDP increased from RWF 1,150 billion to RWF 16,355 billion (14x)
- Agriculture's share of GDP decrease from 33% to 27%
- Industry sector grew from 14% to 22%
- Services sector maintained its 44% share of GDP

# Rwanda has achieved **REMARKABLE PROGRESS** in Hospitality sector

2020	2024
<b>497,000</b> total visitor arrivals	<b>1,360,000</b> total visitor arrivals
<b>36,000</b> park visits	<b>150,500</b> park visits
<b>\$131M</b> In tourism revenues	<b>\$647M</b> In tourism revenues
<b>16,000</b> hotel rooms	<b>21,102</b> hotel rooms



Rwanda's target is to **nearly double its** tourism revenues to **\$ 1.1 billion** by 2029

Source: RDB Tourism, ICCA World

# The Progress Is supported by increasing **events hosted...**

**+\$84.8M**

Revenue generated in 2024

**+52.3k**

Delegates in 2024

**160**

Events hosted in 2024



Attended by 3000 delegates



Attended by 1000 delegates




Attended by 2000 delegates



Attended by 1000 delegates



Attended by 4,000 delegates

An aerial photograph of a lush, dense tropical forest. The canopy is a vibrant green, with various shades and textures of foliage. A river or stream winds through the forest, visible as a dark blue line. The overall scene is a rich, natural landscape.

# Why Rwanda?

# Rwanda has access to African & global markets through robust free trade agreements

## Regional agreements



**EAC free trade agreement**  
East African Community



Population  
300 M



GDP<sup>1</sup>  
\$ 168 Bn



**COMESA free trade agreement**  
Common Market for Eastern and Southern Africa



Population  
492 M



GDP<sup>2</sup>  
\$ 682 Bn

## Intercontinental agreements



**Everything but Arms agreement**  
European Union



Creating One African Market

**Africa continental Free trade area agreement- 1.3 bn market**

# RWANDA IS OPEN & CONNECTED TO THE WORLD

80M

Population Living in Close proximity

300M

Population in East Africa Community

\$29T

Size of Africa's economy in 2050



# Rwanda is reliable education & Innovation Partner

Rwanda is a proof-of-concept destination & building an Innovation ecosystem

**BIONTECH**

**ircad**  
Africa

**zipline**

**AMPERSAND**



Volkswagen

**haris**  
unmanned  
aerial  
solutions

**< norrsken >**

And is home to **Africa's top universities**



Changing the way health care is delivered around the world

**Carnegie Mellon University**

Educating and empowering the next generation of African engineer.



Specializes in conservation agriculture and One Health principles.



Preparing students to make an impact as leaders

# Building a New Airport

## BUGESERA CENTRAL

MEDICAL CITY



UNIVERSITY



MEGA AFRICA DUTY FREE MALL



Cluster 3 - Bugesera

3

Cluster 5A - Mixed Use

5

Cluster 5D - Mixed Use

5

## MIXED USE HUBS



ECO-VILLAGE



MIXED-USE NEIGHBOURHOOD

Cluster 5B - Mixed Use

5

Cluster 5C - Mixed Use

5

1  
New International Airport

ECONOMY HOTEL



LOGISTICS HUB



2

Cluster 2 - Rilima

5\*  
ECO-HOTEL & RESORT



3\* & 4\* HOTELS



CULTURE VILLAGE



AFRICAN MODERN ART MUSEUM



WATER PARK & AMUSEMENT PARK



CANOPY ADVENTURE ZONE



CASINO



OUTDOOR CONCERT ARENA



YOUTH SPORTS ACADEMY



EXHIBITION CENTRE



AGRI-TECH HUB



CLEAN TECH & ENERGY



AGRI HUB

Cluster 4 - Agri-hub

4



# A selection of companies that chose Rwanda...

Kwitonda Lodge by Singita



One & Only Gorilla's Nest



Bisate Lodge by Wilderness Safaris



One & Only Nyungwe House



AKAGERA Game Lodge by Mantis



Magashi by Wilderness Safaris

A hillside covered in dense green forest, featuring several traditional houses with thatched roofs and wooden balconies. The houses are illuminated from within, and the sky is a dark, overcast grey. The text "Thank you!" is overlaid in the center in a large, white, sans-serif font.

Thank you!

## Industry Leader Keynote Interview

**How are African airline CEOs approaching structural industry shifts, potential for growth, sustainability implications and business transformation.**



**Ms. Yvonne Makolo  
RwandAir CEO**



**Mr. Allan Kilavuka,  
Group CEO – Kenya  
Airways**



**Ms. Maureen Kahonge,  
Senior Manager  
Business Development  
& Communications –  
AFRAA**

**Moderator**

# Disrupting the Status Quo

18.9% World Population

2.1% Pax Traffic

2% of Cargo

Population: 1.549 Bn

*Nearly 60% under the 35 years of age*

\$0.9 net profit per passenger for 2024

Pax: 98M (2024 ), 113M (2025e)

Airlines: +419

Airports: +265

Intra-Africa Traffic: 28%

Intercontinental Traffic: 32%

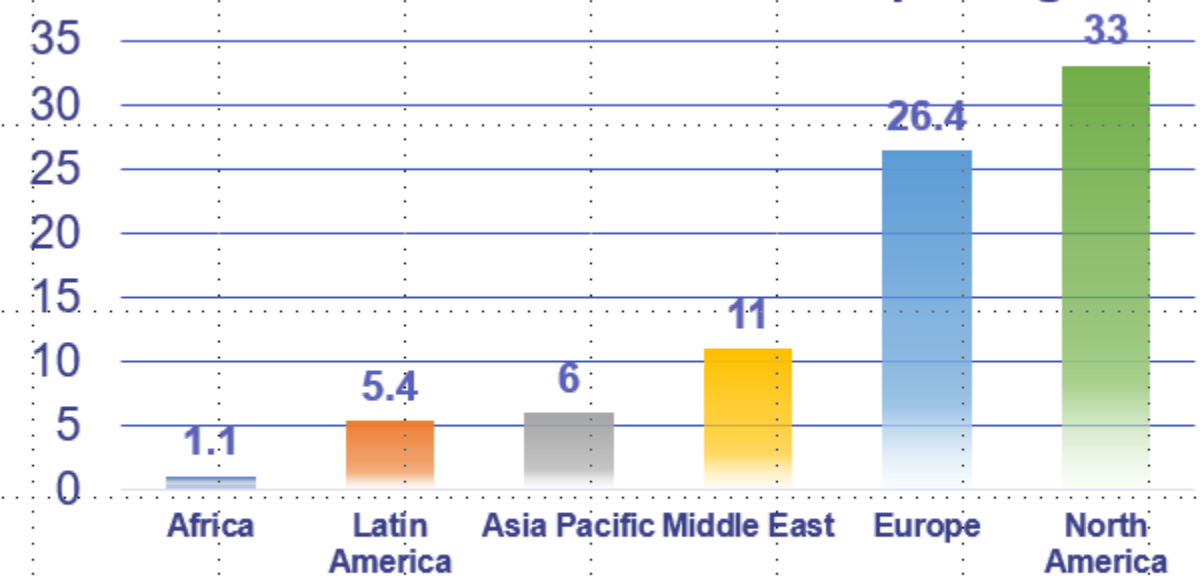


# Route Development



Source: Flightradar24

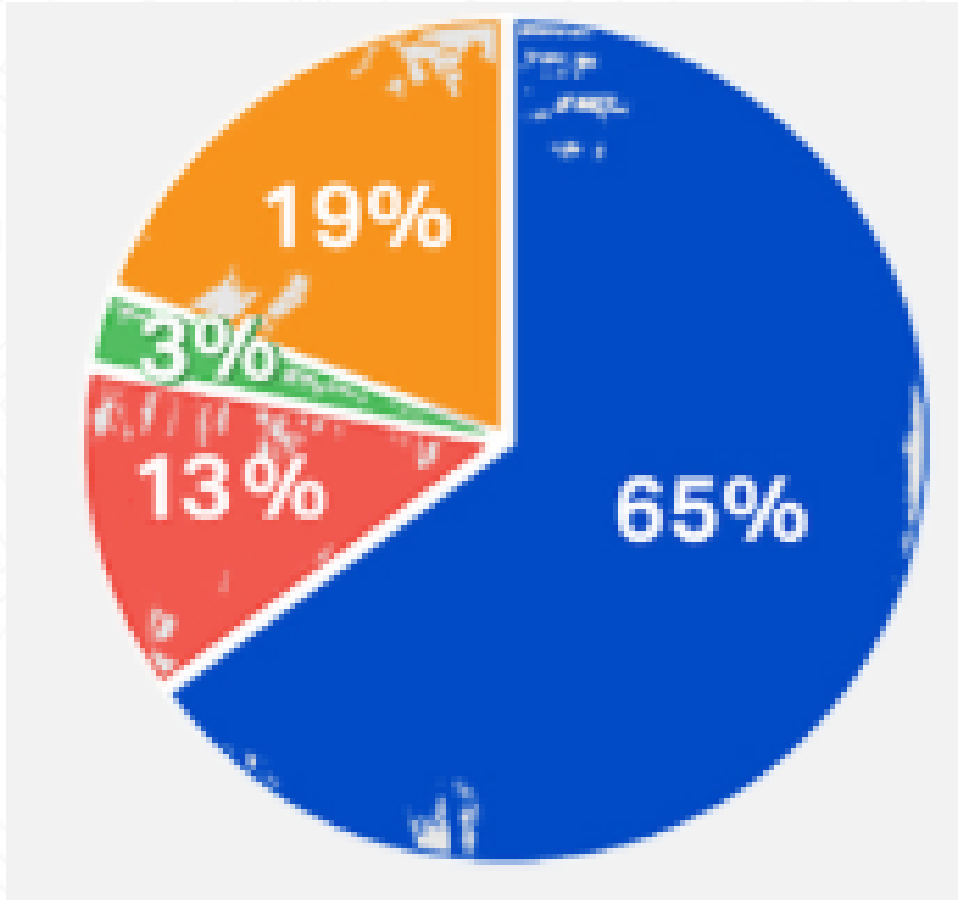
## GDP VS. Number of tickets per region



## US Cents charged per KM

15 Africa      11 Latin America      6 Europe

Source: AfDB

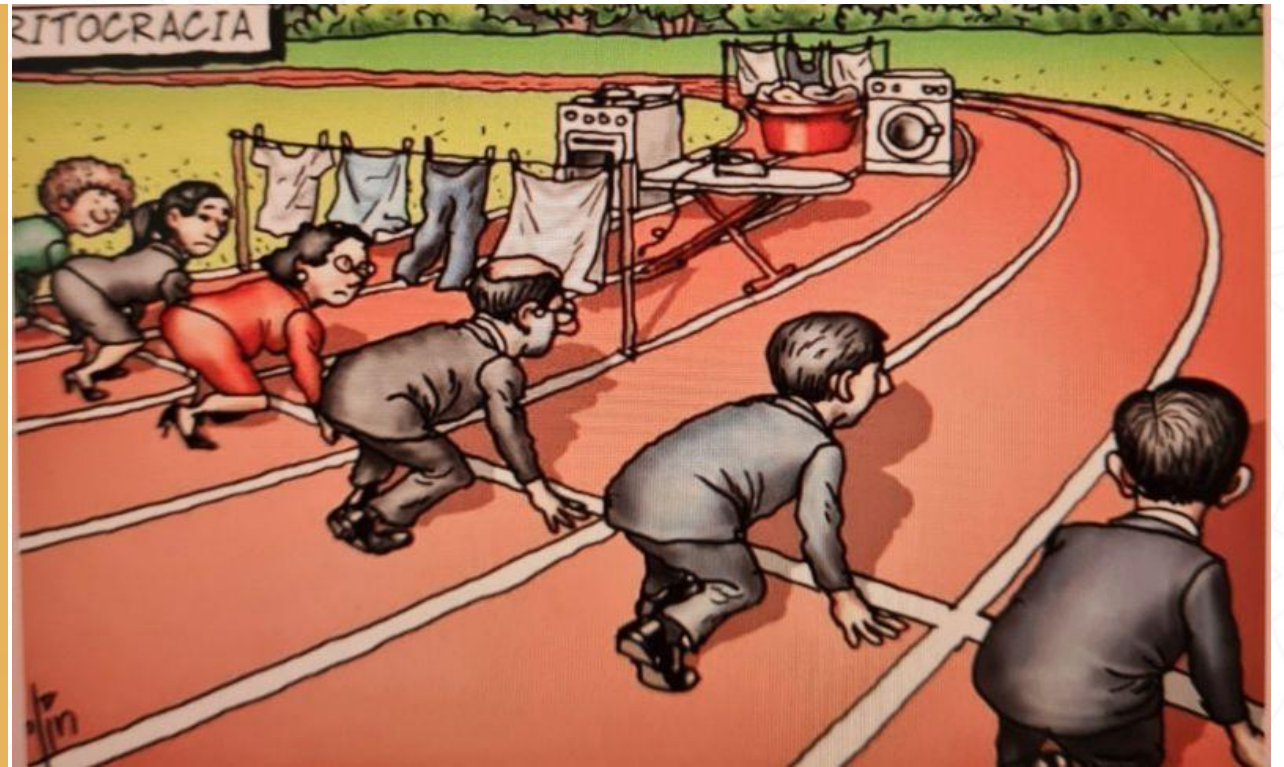


- **65%** Sustainable Aviation Fuels (SAF)
- **13%** New technology, electric and hydrogen
- **3%** Infrastructure and operational efficiencies
- **19%** Offsets and carbon capture

# Digital Transformation Trends in The Travel and Tourism Industry



# Talent, Diversity & Leadership



# Presentation 2

## Airline partnerships as a catalyst of growth for African carriers



**Mr. Arvind  
Chandrasekhar, Head of  
Network & Fleet  
Management -  
Lufthansa Consulting**





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**Lufthansa Consulting**

# Airline partnerships as a catalyst for growth of African carriers

Lufthansa Consulting  
May 2025

Better Skies for Africa



# Several airlines, but network gaps exist across the continent

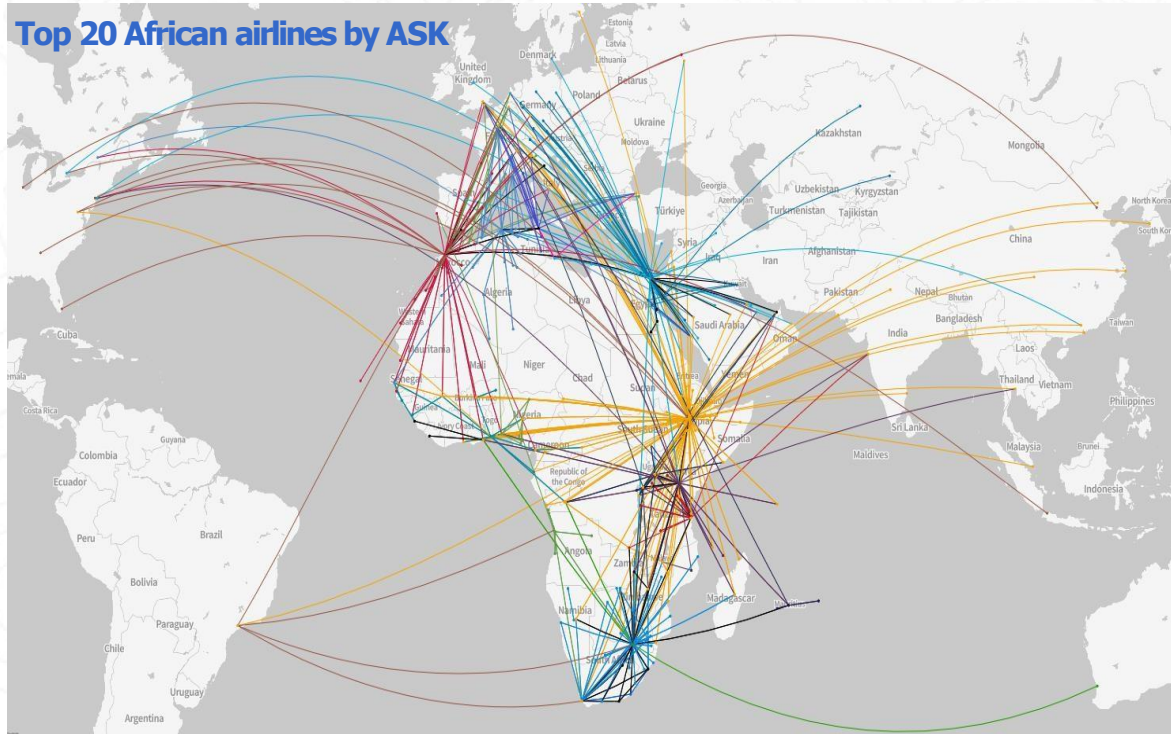


## Scheduled network 2025

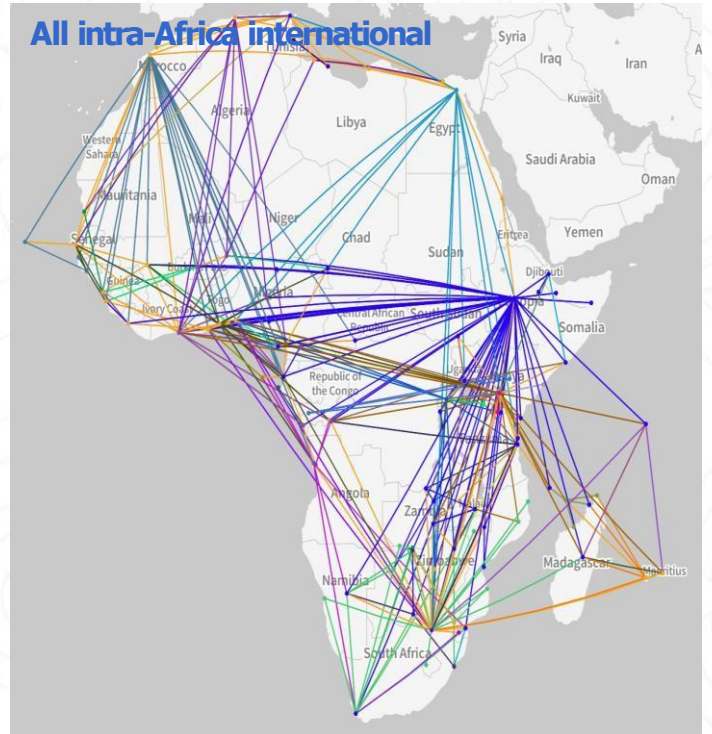
~2.5% of global traffic...

...but 15%+ of global airlines!

Top 20 African airlines by ASK



All intra-Africa international



Source: IATA AirportIS; OAG



**Lufthansa Consulting**

# Partnerships deliver value in multiple ways



Expanded network reach



Increased Load Factors (and, more importantly, revenue)



Cost efficiency through shared resources



Market access



Improved customer experience and loyalty



# Let's take a look at Rwandair's network...

## On its own metal



## Codeshare network

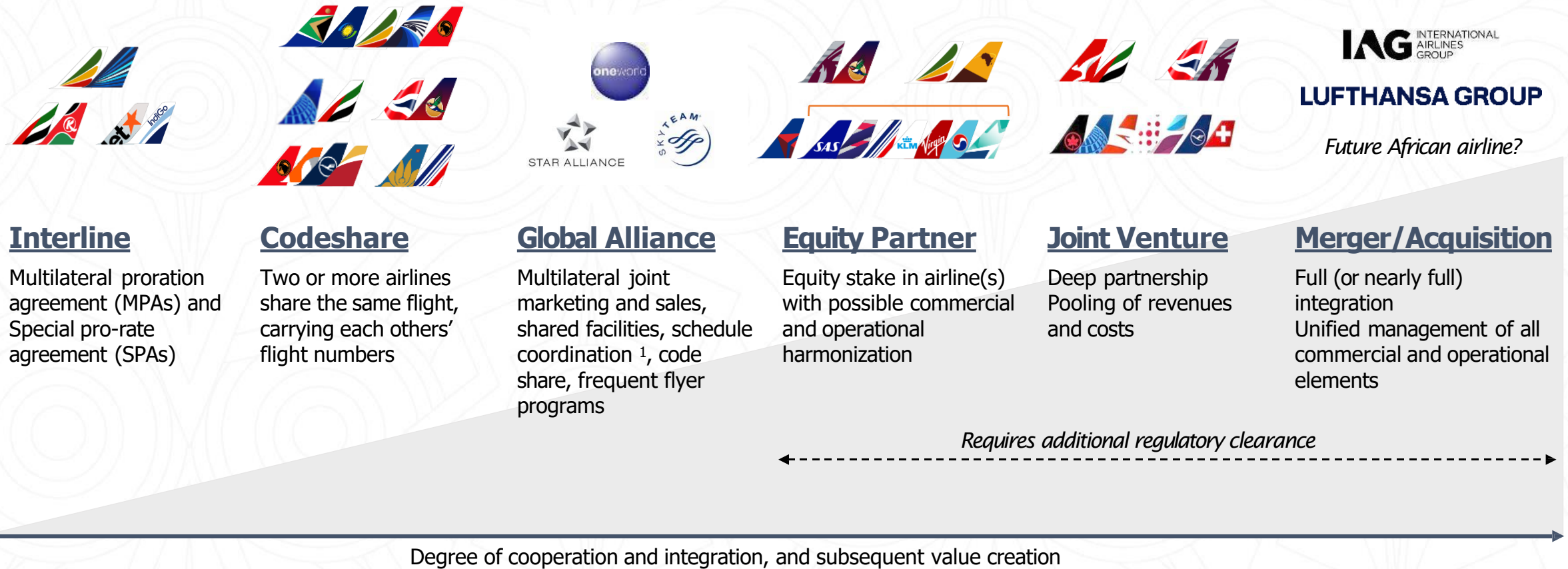
Indicative



Note: Maps reflect scheduled routes in 2025 as of 10 May 2025  
Source: OAG, Cirium

# Several degrees of commercial partnership are possible

Not exhaustive



Source: Lufthansa Consulting, Cirium

**IAG** INTERNATIONAL AIRLINES GROUP  
**LUFTHANSA GROUP**  
*Future African airline?*

# The ecosystem is evolving

Alliances are less relevant;  
regional champions matter



Market access trumps business model



New platforms ease partnership implementation



# There are, however, some known barriers to executing this



**(Aero)political barriers**



**Pre-existing partnerships**



**Safety and compliance concerns**

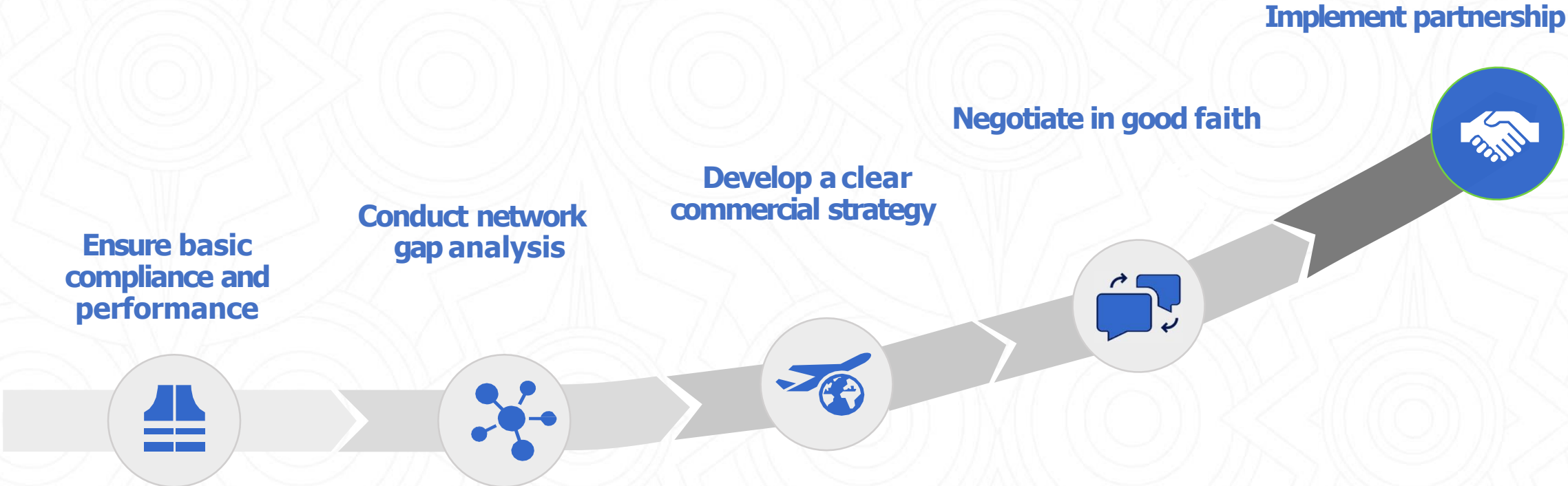


**Perceived execution risks**

Addressing these challenges is key to enhancing collaboration among African carriers and with external airlines



# Airlines should take a structured approach to partnerships



Feel free to reach out; we look forward to discussing this further



**Catrin Drawer**

Partner  
Head of Market Africa, Indian Ocean, Iraq, Jordan

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*Fly the dream of Africa*

# THANK YOU

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# Panel discussion 1

## Seamless and efficient air travel experience in Africa through harmonized cross-sectorial approach



**Mr. Shahab  
Matin, Managing  
Director  
Commercial  
Marketing -  
Africa & Middle  
East Region**



**Ms. Eva  
Nishimwe,  
Deputy Managing  
Director -  
Rwanda Airports  
Company**



**Prof. Dr. Eyden  
Samunderu,  
Project  
Contracted  
Expert, EASA (  
NTU/Amena-**



**Mr. Ali Tounsi,  
Secretary General  
- ACI-Africa**



**Raphael Kuuchi -  
AFRAA  
Consulting  
Director  
Government,  
Legal & Industry**

# Presentation 3

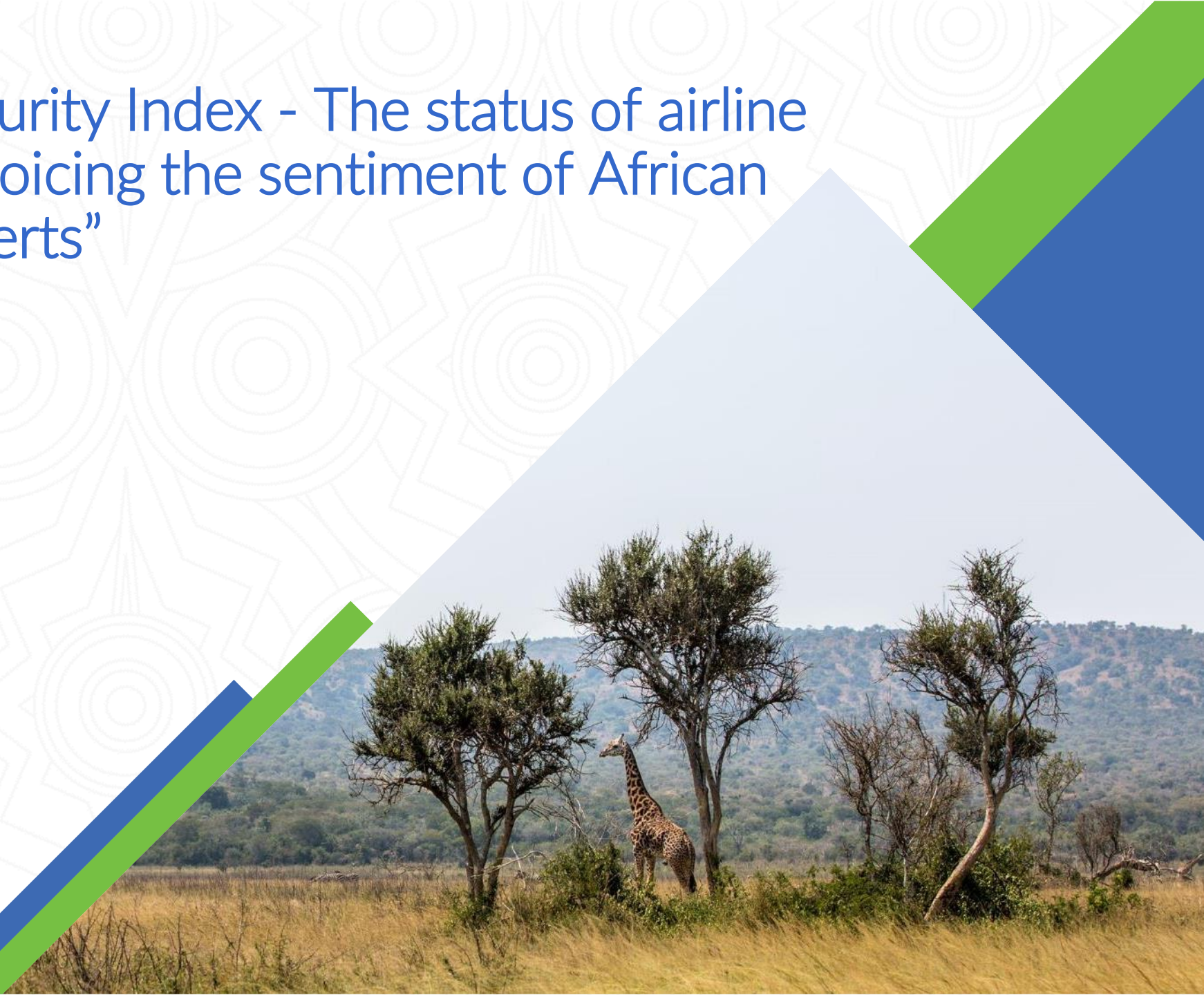
“Airline Payment Maturity Index - The status of airline payments in Africa: Voicing the sentiment of African Airlines payment experts”



**Ms. Sandy Samaan, Vice  
President, Head of Visa  
Consulting & Analytics  
for Sub Saharan Africa -**

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**Visa**





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# VISA

## AIRLINE PAYMENT MATURITY INDEX

The status of airline payments in  
Africa

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## VISA Consulting & Analytics (VCA)

- Extensive presence in Africa, with regional offices in Johannesburg, Nairobi, Lagos and Cairo and additional 5 local offices
- 1000+ professionals worldwide, including Consultants, Data Scientists and Economists
- 2000+ projects delivered worldwide in 2024
- Unique access to VISANet data

## Our partnership with AFRAA

- AFRAA Partner since 2024
- Joined AFRAA Route Network Coordination & Cargo Committee Meeting (RNCC) in September 2024 with presentation on “Innovative approach to airline network planning”
- Loyalty webinar October 2024 “Transforming Loyalty Programs from a Cost of Sales to Revenue Generators”
- Selected by several AFRAA carriers as exclusive Cobrand Card partner



## Our research in partnership with AFRAA

- Thanks to the AFRAA partnership, in Q4-24, we shared with [Airline Payment Maturity Index Questionnaire](#) and collected 32 answers from senior airline executives, directly responsible for payments from a commercial and/or financial angle.
- Each of the [15 questions](#) was scored [from 1 to 4 points](#):
  1. Needs attention;
  2. Developing;
  3. Competent;
  4. Best Practice
- The respondents were not aware of the score associated with each possible choice when answering.





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# Current airline performance

A clear missed revenue  
opportunity

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# Payment performance of African Airlines



## Industry view

- Airline retailing aims to transform traditional airline sales models into **dynamic retail environments**, offering personalized and ancillary services directly to passengers.
- In this context, the **significance of payment systems becomes even more pronounced**, as seamless and secure transactions are essential to the success of these retailing efforts.
- A study conducted by McKinsey & Company and IATA back in 2019<sup>1</sup>, the global airline industry could unlock an **additional US\$40 billion in value by 2030** through effective implementation of retailing strategies.
- When the same study was updated in 2024<sup>2</sup>, the amount **increased to US\$45.5 billion** – with the largest proportion of value driven by ‘**Optimized payment and fulfillment**’, accounting for US\$20.3 billion, or 45% of the total value available.

## Our VISA data



Fig.1 – Payment performance of African Airlines vs. Rest of the World Airlines (2024)

1. McKinsey & Company and IATA, November 2019, Where is the Value in Airline Retailing? Short summary of value creation analysis, Nov.2019

2. McKinsey & Company and IATA, Ready for takeoff: The airline retailing opportunity, Oct. 2024

# Key areas

## Passenger experience





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# Our questionnaire

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# Our questions



	 <b>Payment strategy</b>	 <b>Payment architecture</b>	 <b>Passenger experience</b>	 <b>Commercial performance</b>	 <b>Internal readiness</b>
Q1	What is your <b>main strategic objective</b> in implementing your payment strategy?	How <b>effective</b> is your current payment architecture in meeting the needs of your business?	How <b>extensive</b> is your coverage of customer touchpoints in your passenger experience strategy?	How would you assess your current payment <b>approval rate</b> ?	How well does your <b>organizational structure</b> support your payment strategy?
Q2	How are different teams within your organization aligned in the <b>execution</b> of your payment strategy?	How <b>compliant</b> is your payment architecture with current regulatory requirements and industry standards?	How does your passenger experience <b>differentiate</b> in the market (point of sales)?	How effectively does your current system manage <b>fraud rates</b> ?	How efficient are your <b>business processes</b> related to payments?
Q3	How would you rate your <b>ability</b> to execute the payment strategy?	How evolved or <b>modern</b> is your payment architecture?	How <b>digitalized</b> is your passenger experience?	How does your system handle <b>chargebacks</b> ?	How effectively do you monitor and utilize <b>payment KPIs</b> ?

## Average score by area

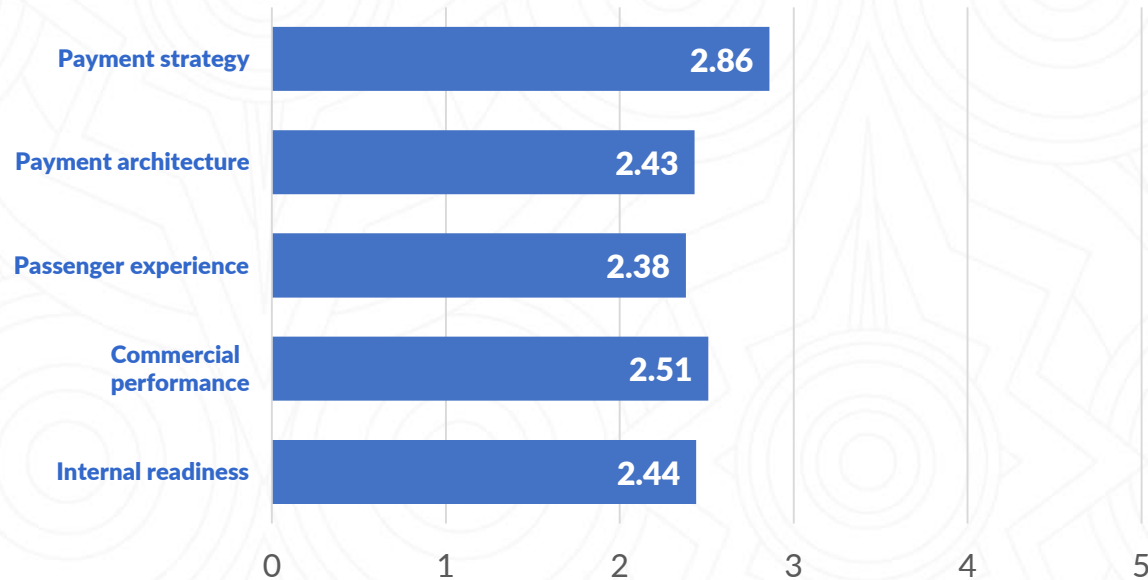


Fig.2 – Airline Payment Maturity Index questionnaire: average score by key area

## Key findings

- On average, airlines self-rated themselves consistently between 'developing' (2) and 'competent' (3) across four of the key areas, with a slightly higher score for 'payment strategy'.
- The survey results reveal a coherent strategic vision undermined by operational inefficiencies, outdated technology, and inadequate data utilization.
- Enhancing internal coordination, modernizing payment architecture, and improving KPI monitoring could align strategic objectives with operational execution, ultimately boosting commercial performance and passenger experience.

# Five airline clusters



Planning

**Operational Challengers**  
7 respondents  
with score 32-36



**Emerging Planners**  
5 respondents  
with score 27-30



**Developing Strategists**  
6 respondents with score 29-32



**Visionary Leaders**  
5 respondents  
with score 44-48



**Competent Executors**  
9 respondents  
with score 35-40



Execution

# Five airline clusters



## Operational Challengers

- Clear plans but need better execution
- Struggle integrating new payment methods
- Manage chargebacks moderately but need better fraud prevention
- Teams are aligned but need more effective collaboration

## Emerging Planners

- Developing roadmaps and acquiring resources
- Payment systems being updated, lack real-time processing and advanced security
- Face high chargebacks and fraud
- Teams need better alignment and collaboration

## Developing Strategists

- Basic plans but struggle with resources and stakeholder buy-in
- Payment systems need optimization and better compliance
- Cover few payment touchpoints, face frequent fraud and chargebacks
- Their teams are unsynchronized

## Competent Executors

- Clear plans and resources but struggle with execution speed and adaptability
- Their compliant payment systems support most modern payment methods
- Offer a competent payment experience
- Need better fraud detection and cross-functional collaboration

## Visionary Leaders

- Excel in all areas
- Advanced payment architectures supporting modern payment methods, real-time processing, and robust security
- Ensure seamless passenger payments
- Teams work harmoniously with clear plans and resources.



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# Key lessons for Africa's Airlines

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# Key lessons for Africa's airlines

- The **evolving landscape** of airline payments is **critical** to the industry's overall success.
- The **efficiency and security** of payment systems are pivotal components that can significantly **impact revenue streams**.
- The maturity of **payment systems** becomes a **key differentiator** for airlines.
- There is a **critical need** for better monitoring and utilization of **payment KPIs** and **data-driven decision making**.
- Improving the coverage of **customer touchpoints** and **digitalizing passenger experiences** is essential in a competitive market
- Payment architectures need to be **compliant** with current regulatory requirements and industry standards
- Strengthening **organizational structures and business processes** is crucial.





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# VISA support to African Airlines

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# Customized support for each airline



The clustering of airlines into five groups allows for more targeted and prioritized recommendations:

<b>Operational Challengers</b>	<ul style="list-style-type: none"><li>• Develop a <b>robust payment</b> architecture that meets basic <b>regulatory requirements</b> and <b>industry standards</b>.</li><li>• Ensure teams are aligned and <b>well-trained</b> in executing the <b>payment strategy</b>.</li></ul>
<b>Emerging Planners</b>	<ul style="list-style-type: none"><li>• Invest in fraud management systems to <b>reduce fraud rates</b> and <b>improve payment security</b>.</li><li>• Implement systems for better monitoring of and response to <b>payment KPIs</b>.</li></ul>
<b>Developing Strategists</b>	<ul style="list-style-type: none"><li>• Expand and digitalize <b>customer touchpoints</b> to enhance passenger experience.</li><li>• Improve <b>efficiency in payment approval processes</b> to boost commercial performance.</li></ul>
<b>Competent Executors</b>	<ul style="list-style-type: none"><li>• Leverage <b>advanced data analytics</b> to drive strategic decisions and fine-tune payment strategies.</li><li>• Integrate <b>cutting-edge payment technologies</b> to stay ahead in the market.</li></ul>
<b>Visionary Leaders</b>	<ul style="list-style-type: none"><li>• Benchmark against global <b>best practices</b> and <b>continuously innovate</b> to maintain leadership.</li><li>• Ensure <b>seamless integration of payment systems</b> with global standards and practices.</li></ul>

# To contact us



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Visa Consulting & Analytics

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**VISA**

**THANK YOU**

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## Panel discussion 2

# CIOs roundtable: Strategies to enhance and innovate end-to-end travel experience in Africa



**Mr. Getaneh  
Woldemichael, Director  
Commercial  
- RENAC**



**Ms. Francine  
Mukeshimana  
, Strategy &  
Performance  
Director -  
Afrijet/FlyGa  
bon**



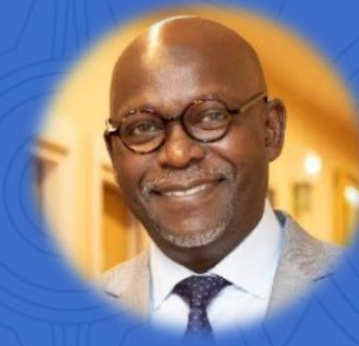
**Mr.  
Jonathan  
Newman, VP  
Business  
Developmen  
t - Accelya**



**Mr. Fouad  
Caunhye,  
Chief  
Commercial  
Officer -  
RwandAir**



**Mr. Lampros  
Brianas,  
Director,  
Subsaharan  
Africa Airlines -  
Amadeus IT  
Group**



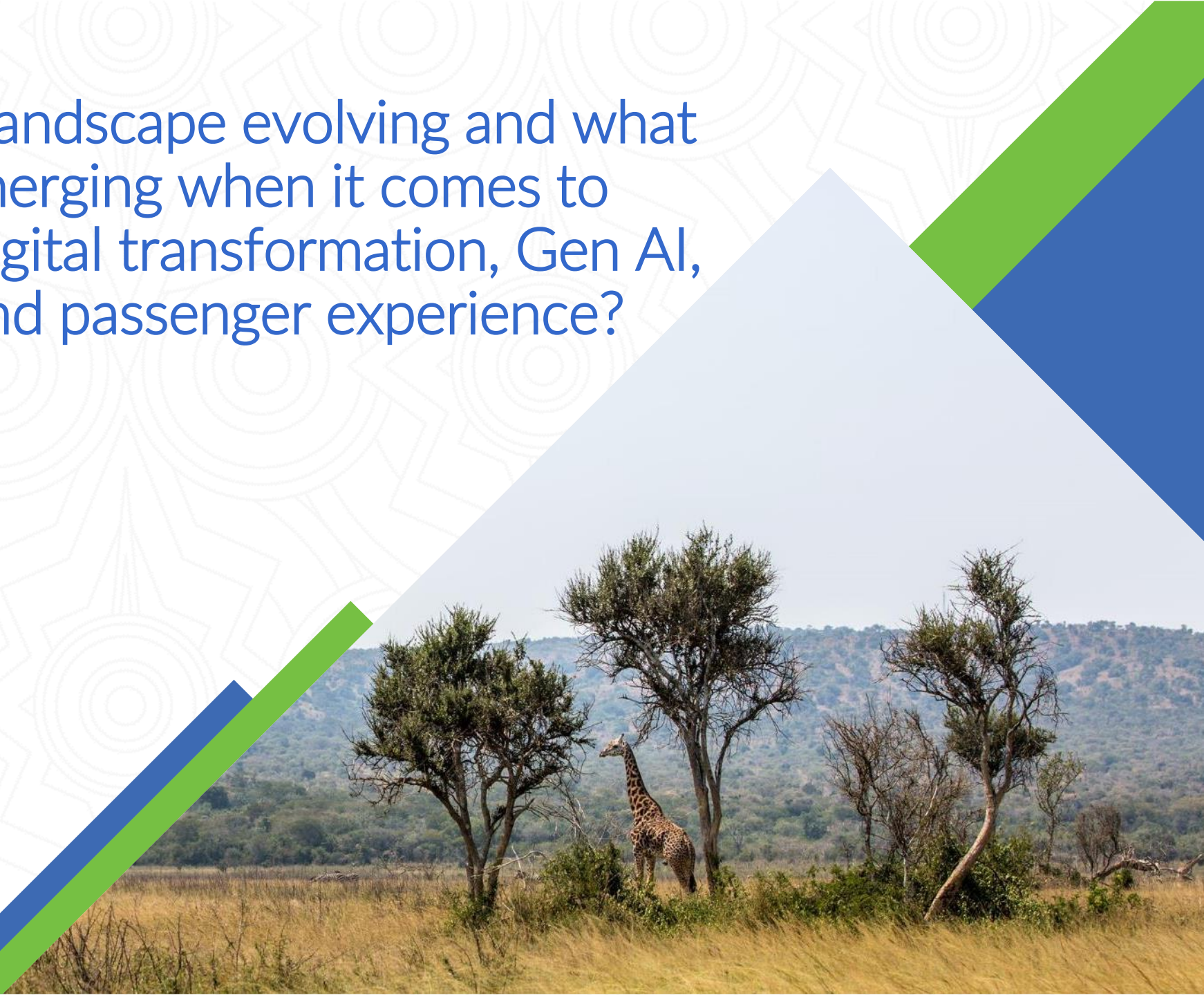
**Mr. Ibra Wane,  
Business  
Development  
Director - APG  
**Moderator****

# Presentation 4

How is the low-cost landscape evolving and what are the key trends emerging when it comes to predicting demand, digital transformation, Gen AI, supply chain issues and passenger experience?



**Mr. Karanja Ndegwa,  
Chief Executive Officer -  
Jambojet**





**Jambojet**  
.com

12<sup>th</sup> May 2025

## Evolution of the Low-cost Airline Landscape and Key Trends.

**Theme:** Sustainability. Collaborate. Innovate

**Presentation by:**

Karanja Ndegwa - MD & CEO, Jambojet





# Africa has a lot of potential to grow....

## Africa

- 18% of world's population
- 3% of global GDP
- 2% of global air traffic

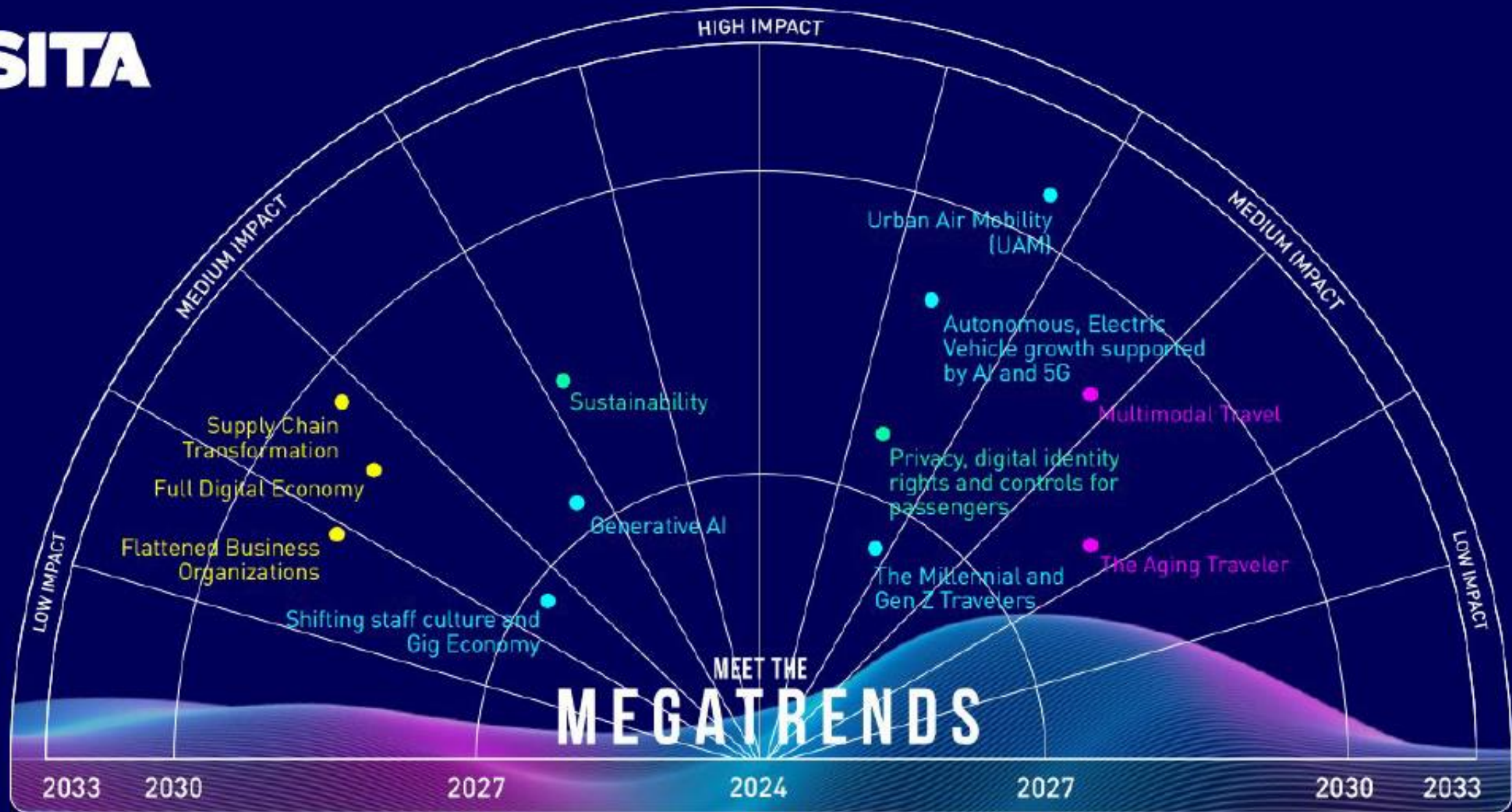
85% International Traffic  
15% Domestic/Regional

Source: Oxford Economics & IATA

- **LCCs are vital for affordability and connectivity in Africa, where air travel penetration is low.**
- **In Africa, where market access barriers remain high, the share of LCCs within the region is about 9% compared to Europe and Asia where its is > 30%**

Source: ICAO





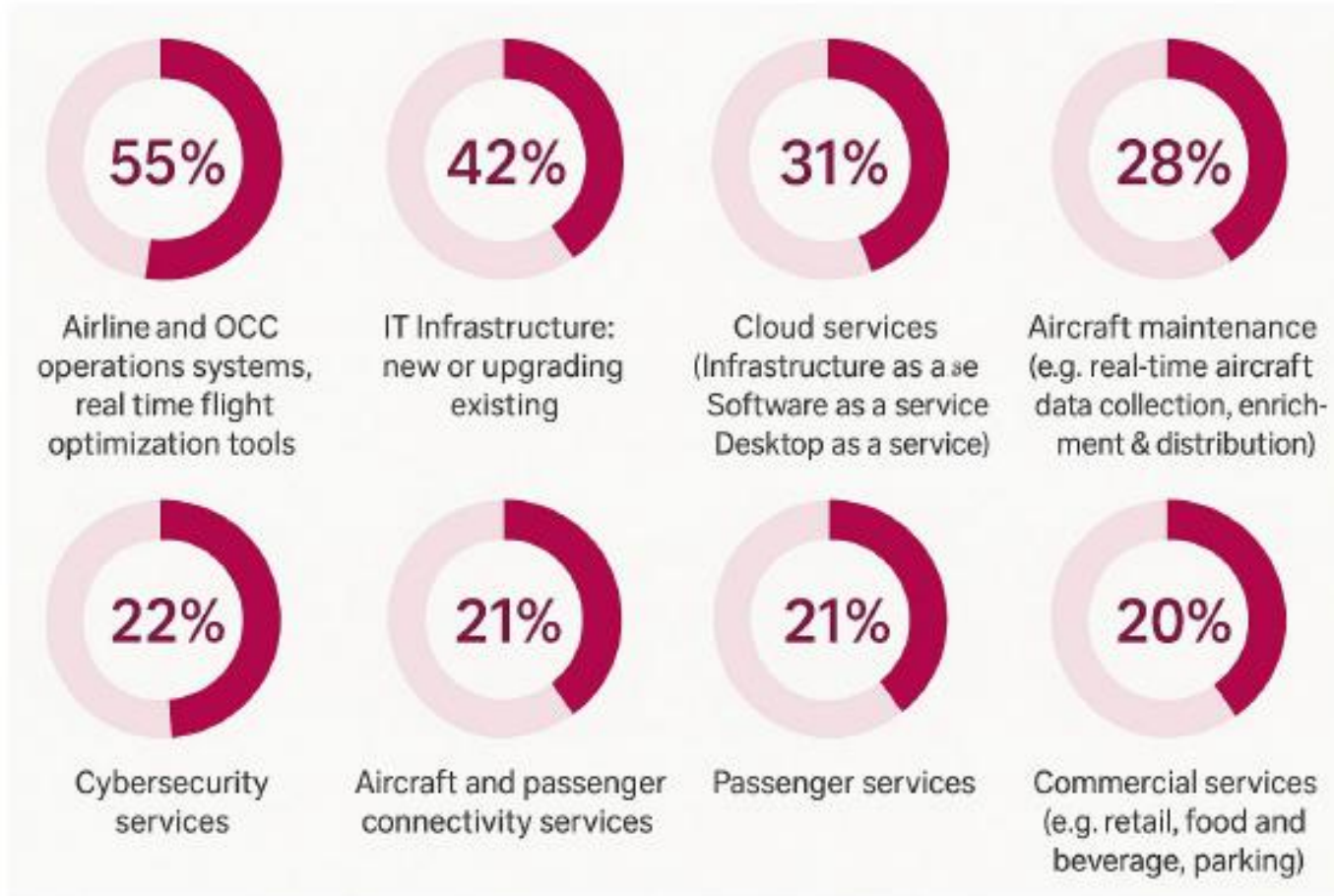
# Data driven precision



- Apply machine learning to analyze historic and real time data for flight & revenue optimization.
- LCCs operate in price-sensitive markets which drive dynamic pricing.
- Forecasting in seasonal routes to adequately manage capacity.
- Route incubation – start low frequency then scale

# Digital Transformation

Where are the airlines investing?



- **90% of global airlines** are digitizing key customer touch points.
- Prioritizing **full scale IT modernization** will enable new digital services, optimize costs and enhance operational flexibility.
- **Mobile first strategies** critical in Africa - digital payment integration, real time flight disruption communication.
- Traditional cost cutting is shifting toward **digital efficiency, automation** and proactive cost management.



# Digital Transformation at Jambojet



**78%**

Web & App Revenue



15below - Disruption Management



Sustainability

Mobile **56%** | Card **21%**

Payments



Laminaar ARMS - EFB, fuel monitoring



Employee Experience

**38%**

Online check in



Passenger communication & feedback



Learning & Development

# Potential of Ai



Several African countries have formulated national AI strategies to drive innovation, economic growth, and societal development. Kenya recently launched its National AI Strategy 2025–2030.

**Machine learning** has already improved passenger forecasting accuracy by 10%, enabling better route planning and pricing.

## AI presents huge potential in:

- Predictive maintenance
- Enhancing competitive advantage
- Ethical deployment of intelligent systems

## Our Next Steps:

- **Automated Ai Chatbots**
- **Intelligent Disruption Handling**
- **Predictive Customer Engagement** (e.g. cross-selling, Upselling & processing)

# Passenger Experience



...Remains a key driver of performance

Companies with a customer experience mindset drive revenue 4-8% higher than the rest of their industries.

Companies that excel at customer experience have 1.5 times more engaged employees than less customer-focused companies.

Companies that use tools like customer journey maps reduce their cost of service by 15-20%.

Companies that lead in customer experience outperform laggards by nearly 80%.

77% of consumers say inefficient customer experiences detract from their quality of life.

Loyal customers are five times more likely to purchase again and four times more likely to refer a friend to the company.

Companies with engaged employees outperform competition by 147%.

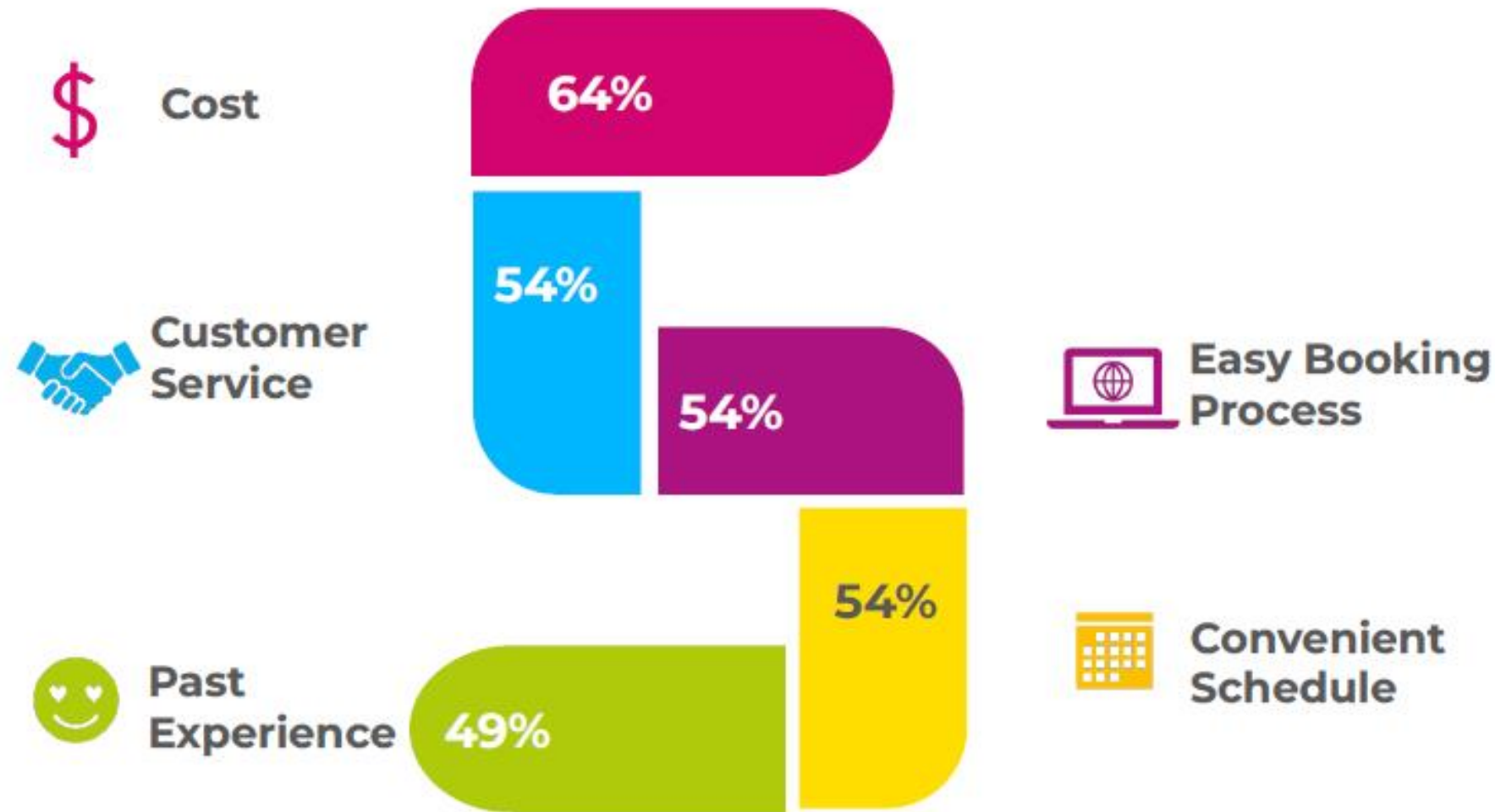
96% of customers say customer service is important in their choice of loyalty to a brand.

Customer-centric companies are 60% more profitable than companies that don't focus on customers.



Source: KANTAR

# 5 key driving factors in choice of airline





## Navigating the Global Supply Chain

- ✈ Global supply chain issues continue to impact aircraft deliveries and costs. According to IATA (Outlook for 2025) capacity constraints will persist in 2025 and beyond – global record for old fleet in 2024(14.8 years)
- ✈ Impact on LCCs - Pressure on expansion plans and operational expenses which are already higher in Africa.
- ✈ Strategies include partnerships, diverse suppliers and proactive planning.



**Thank you**

# Presentation 5

## Enhancing airline profitability through effective Direct Operating Cost management



**Mr. Jean-Marc Perreaux,  
Sales Director - Maureva**



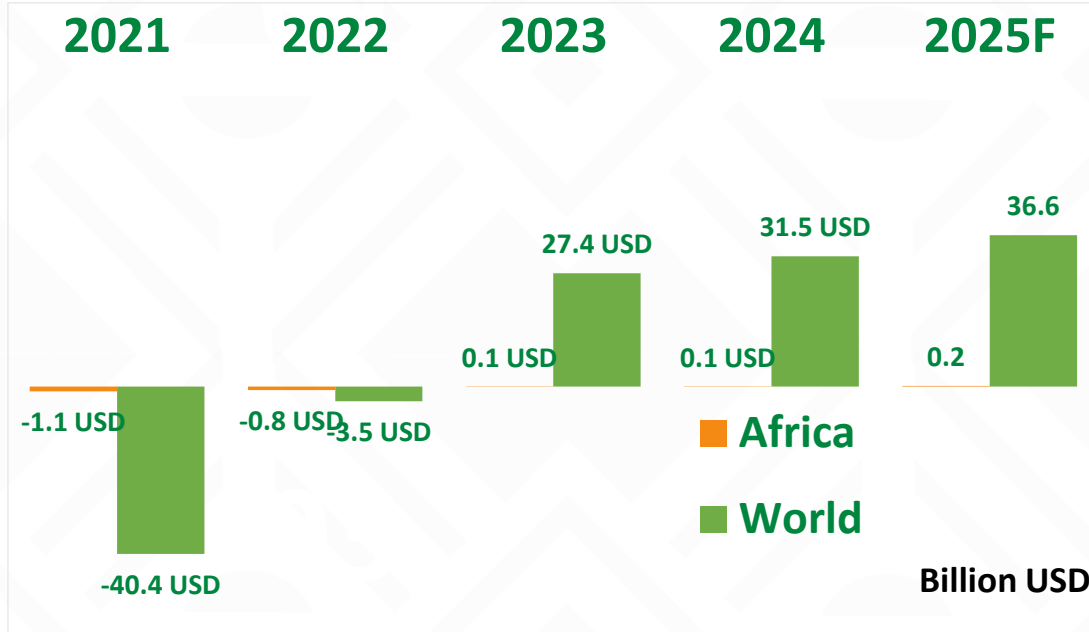


**maureva**

Let's talk about costs!

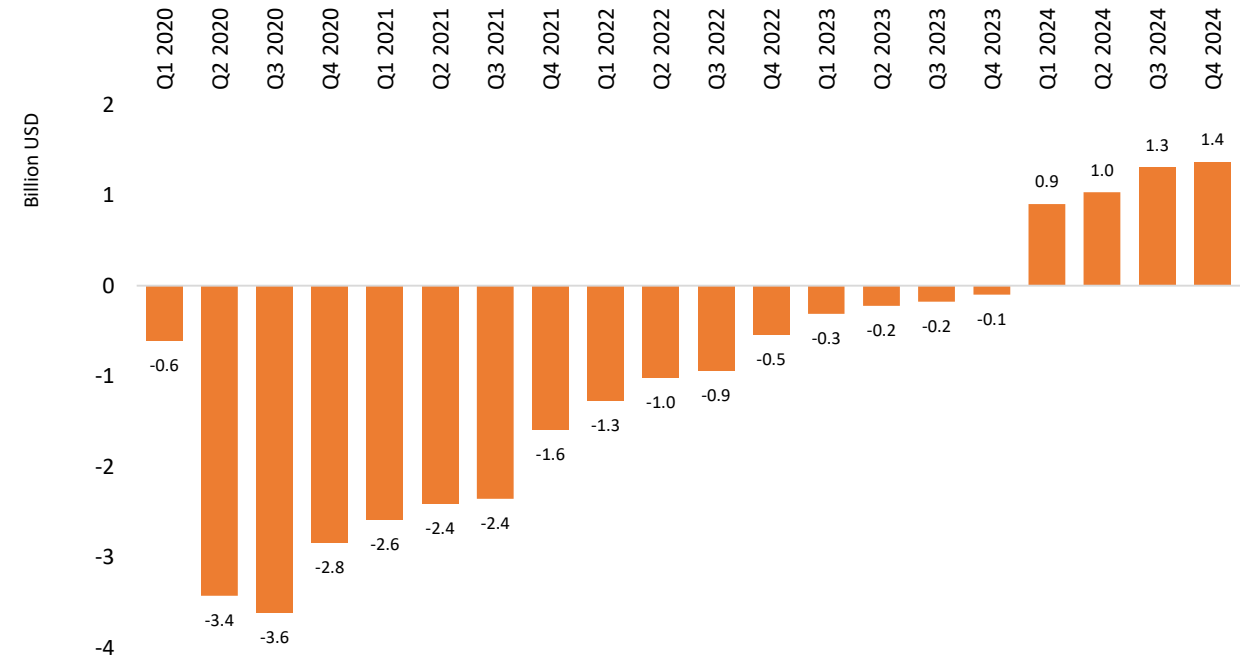
# AFRICAN AIRLINES PERFORMANCE

## FINANCIAL RESULTS 2021 -2025 (FOR.)



- ✓ GLOBAL Net Profit Forecast 2025: **USD 36.6 Billion**
- ✓ AFRICA Net profit Forecast 2025 : **USD 0.2 Billion**

## PASSENGER REVENUE LOSSES/PROFIT COMPARED TO 2019

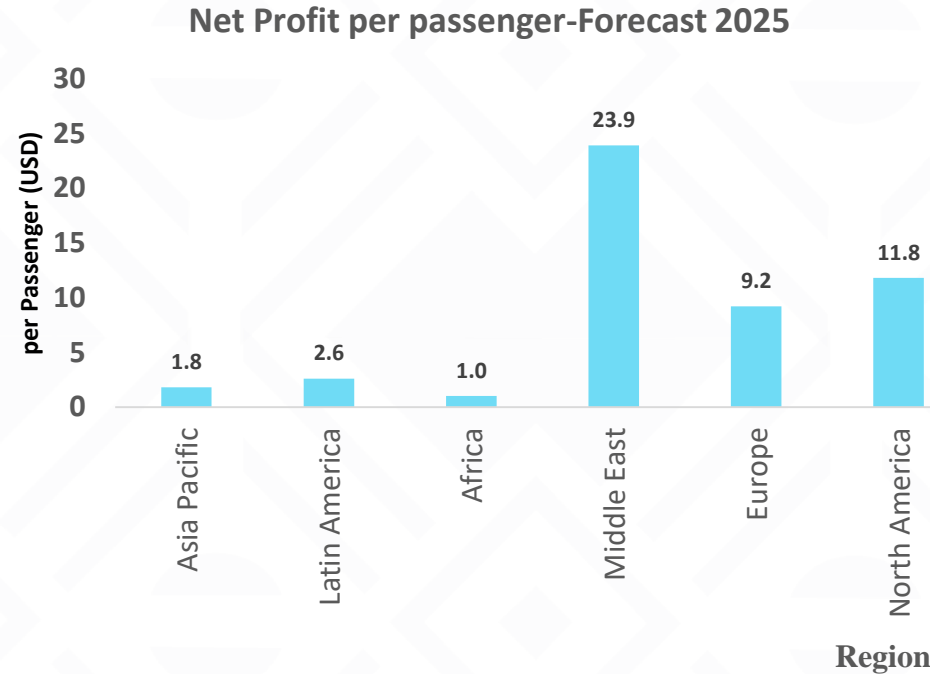


- ✓ Global profit forecast per passenger 2025 : **USD 7.0**
- ✓ AFRICA profit forecast per passenger 2025 : **USD 1**

Source : AFRAA,OAG,IATA Sustainability Economics, All Africa

# AFRICAN AIRLINES PERFORMANCE

## NET PROFIT FORECAST



- ✓ Global profit forecast per passenger 2025 : USD 7.0
- ✓ AFRICA profit forecast per passenger 2025 :USD 1

Source : AFRAA,,IATA Sustainability Economics, All Africa, APEX AERO



**maureva**

Let's FOCUS ON costs!



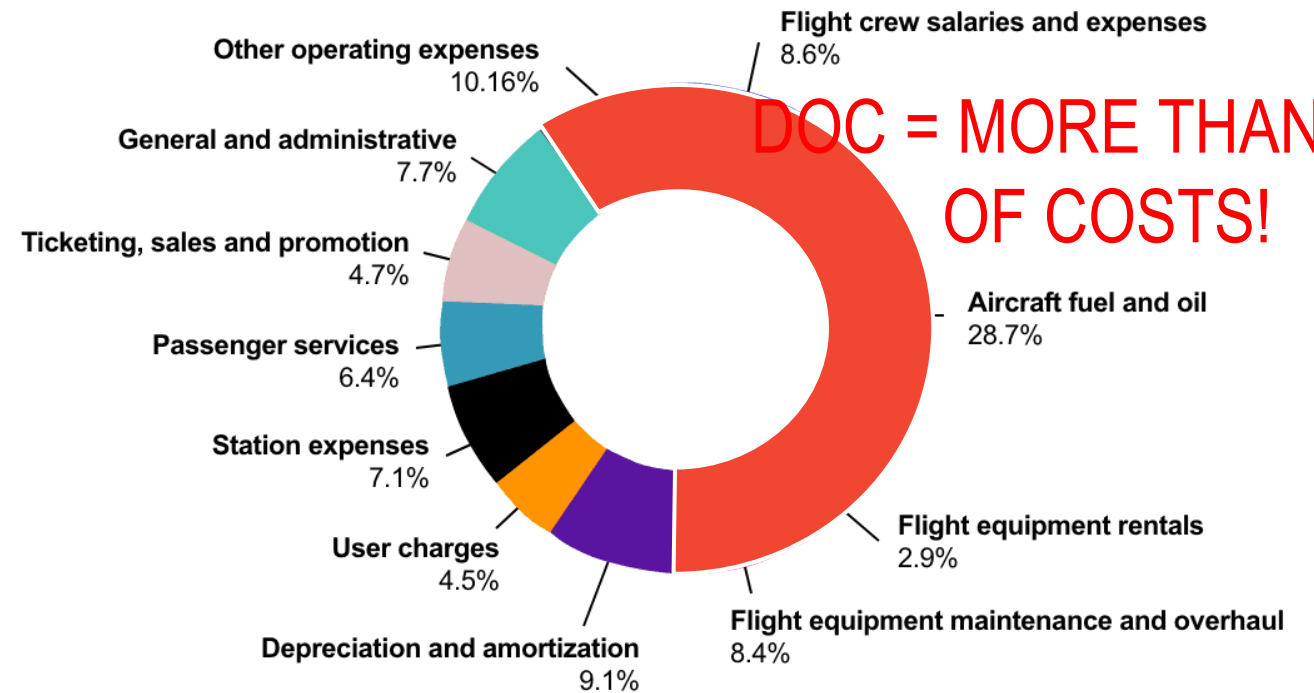
## DIRECT OPERATING COSTS (DOCs):

- FUEL
  - GROUND HANDLING
- AIRPORT CHARGES (LANDING, PARKING, etc.)
  - NAVIGATION CHARGES
- CREW COSTS & EXPENSES
  - MAINTENANCE
    - Etc.

REPRESENT more than **50%** of costs

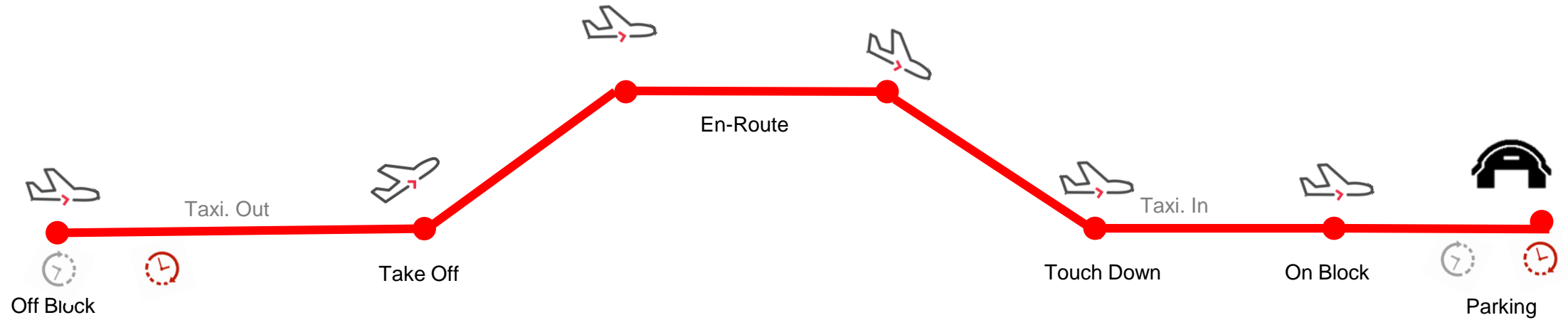
With FUEL costs amounting for  
More than **30%** in 2024

## Airline Cost Items Breakdown





For each **FLIGHT** ....



Parking

Fuel Uplift

Baggage handling

Pax Boarding

Cargo Handling

Catering

Take off charges

Noise charges

Overflight charges



Transferts et Hotels (Crew / Pax)

Landing fees

Parking

Handling charges

Pax Disembarking

Cleaning

**MULTIPLE COSTS**  
**COMPLEX COST CALCULATION FORMULaES !**  
**MULTIPLE PROVIDERS INVOLVED !**



# COST MANAGEMENT & INVOICES VALIDATION IS VERY OFTEN DeCENTRALISED & MANAGED BY STATIONS



## IMPACTS :

- Non-centralized cost data: **Lack of visibility**
- **High organizational costs** for processing invoices
- Inconsistent and often **weak invoice control levels**
- Significant **variations in invoice payment timelines**
- **Challenges in generating accruals** and establishing a budget

# OUR SOLUTION : IMPLEMENT a **COST MANAGEMENT SOLUTION**

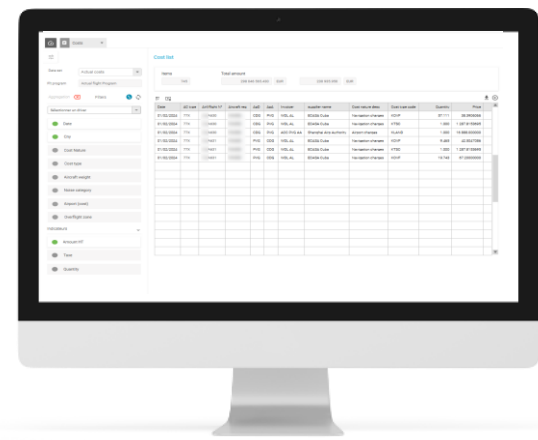
- **OBJECTIVE:** Digitization and centralization of cost calculation and control.  
Base cost calculations on activities rather than on received invoices.
- Approach varies than ERPs
  - **“Activity-Based Cost Management”**
- Focus Direct Operating Cost :
  - Fuel
  - Ground Handling
  - Airport & Passenger Charges
  - Navigation Charges
  - Crew Hotel
  - Catering
  - Cargo Handling
  - Etc.



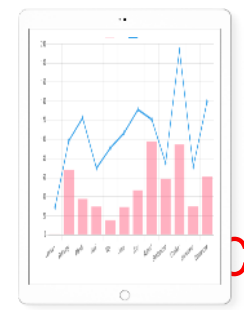
# HOW DOES KEOPS

## 1/ COST CALCULATION

- 1/ AIRCRAFT REFERENCES & NETWORK
- 2/ CONTRACTS MODELIZATION (PRIVATE + PUBLIC)
- 3/ FLIGHT ACTIVITES (FUTURE Or PAST)

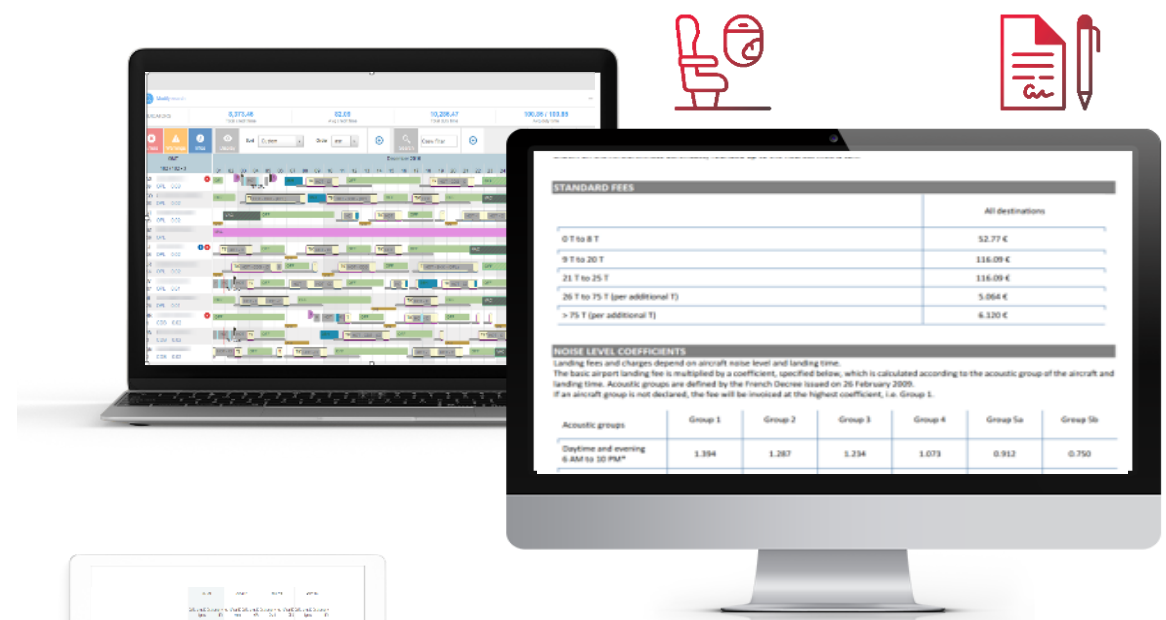


CALCULATION AT FLIGHT LEVEL



Budget & FORECAST Generation

CRUALS CALCULATION



ERP

# HOW DOES KEOPS WORK?

## 2/ INVOICE CONTROL



LOADING OF **PROVIDERS INVOICES**  
10% - Electronic (DIGITALISED INFO)  
90% - PDF / PAPER (HEADER CAPTURE ONLY)



**ReCONCILIATION** WITH CALCULATED COSTS

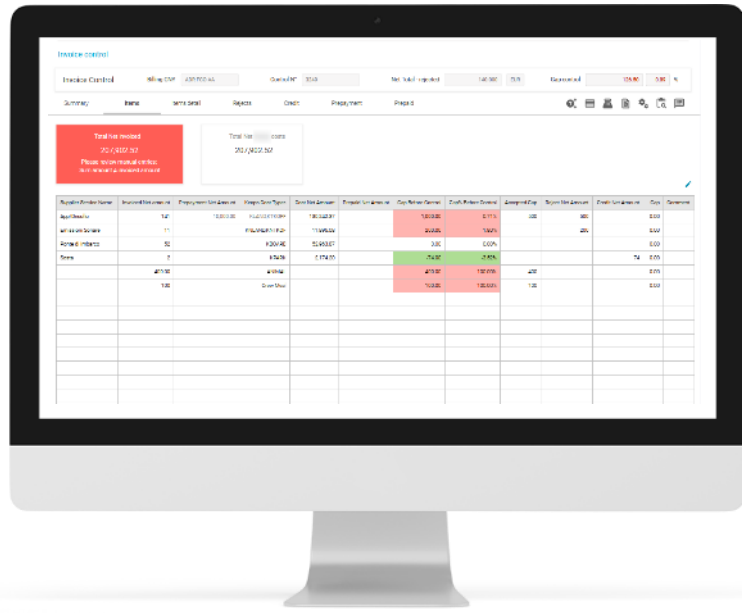


**GAPS IDENTIFICATION**



**CLAIMS** Generation

**ERP** Transmission



**AUTOMATED PAYMENT APPROVAL**



# WHAT BENEFITS & ROI

## Organizational BENEFITS

### → Centralization of cost data

- Improved visibility regarding Direct Operating Costs (DOC)
- Better visibility of supplier contracts
- Enhanced knowledge of suppliers
- Improved ability to assess performance

### → Reduced invoice processing costs

- Shortened processing time

### → Automation and standardization

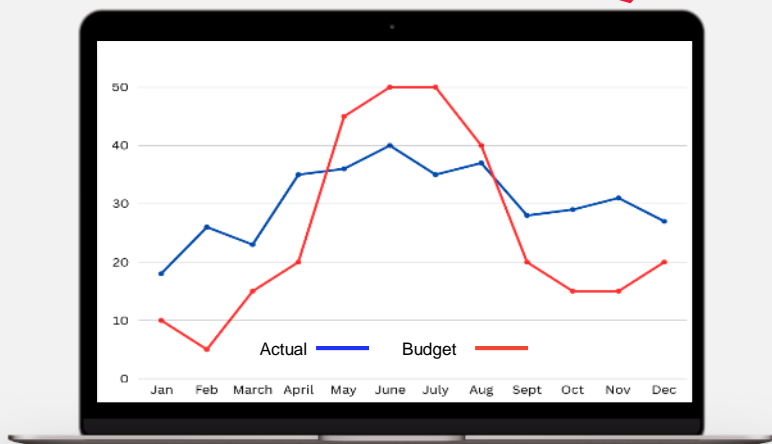
- Automated invoice approval process (rules integrated into the cost management system)



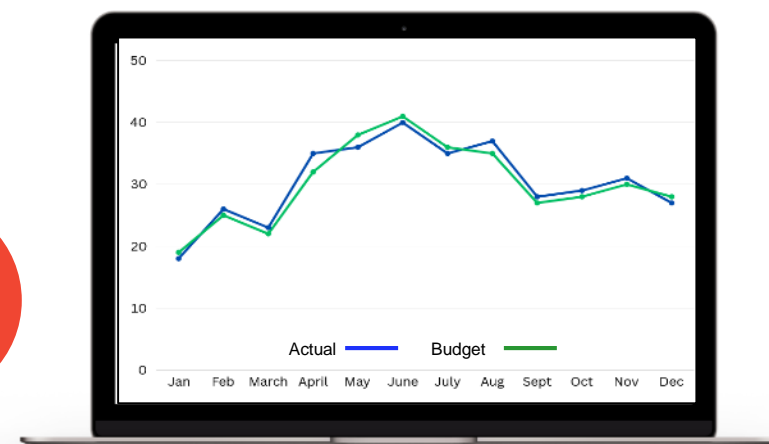
# WHAT BENEFITS & ROI

## Budget / FORECAST

### WITHOUT DOC MANAGEMENT SOLUTION



### WITH KEOPS



Approximately 3 weeks to generate

Based on hypothetical data Previous flights and estimated tariffs

Time consuming Process



Generated in A few hours Or minutes

Hypothesis based On scheduled activities And modeled rates

Efficient process Maximizing time And processes

# WHAT BENEFITS & ROI

## COST SAVINGS

- Claim generated in average : **0.5%** and up to **2.5%** of total DOC billed
- Estimated Savings : **USD 50K – USD 500K** per **A/C** per year

## SUCCESS STORY CLIENT KEOPS 2024

Client: North Africa Region / Fleet: **11 A320**

Period under review: **10 months** (December 2023 – September 2024)

Amount of DOC invoiced (Fuel, Ground Handling, ATC, Airport Charges): **USD 170M**

**Claims made: USD 3.09M**, representing 1.82% of total managed DOC

**Claims paid: USD 2.5M**, or 81% of claims (as of October 15)

Management handled by: **2 full-time invoice** controllers





# KEOPS MANAGED OUTSOURCED INVOICE CONTROL SERVICES



## → INVOICE CONTROL SERVICES FOR AIRLINES

- ✓ Scope : DOC (Fuel, SGHA, Airport & Passenger Charges, ATC)
- ✓ Deliveries : Claims, Accruals Reports, Cost Details reports
- ✓ Estimated setup time : 3 months

## → What we need:

- ✓ Access to Flight Operations Data (Flight Ops)
- ✓ Access to your private agreements (e.g., Fuel, Ground Handling)
- ✓ Relevant DOC invoices



## DO YOU KNOW YOUR DOC WELL ?



→ Are you able to quickly assess the cost impact of an aircraft type change on a flight schedule?

→ Do you know how much a delay actually impacts the cost of a flight?

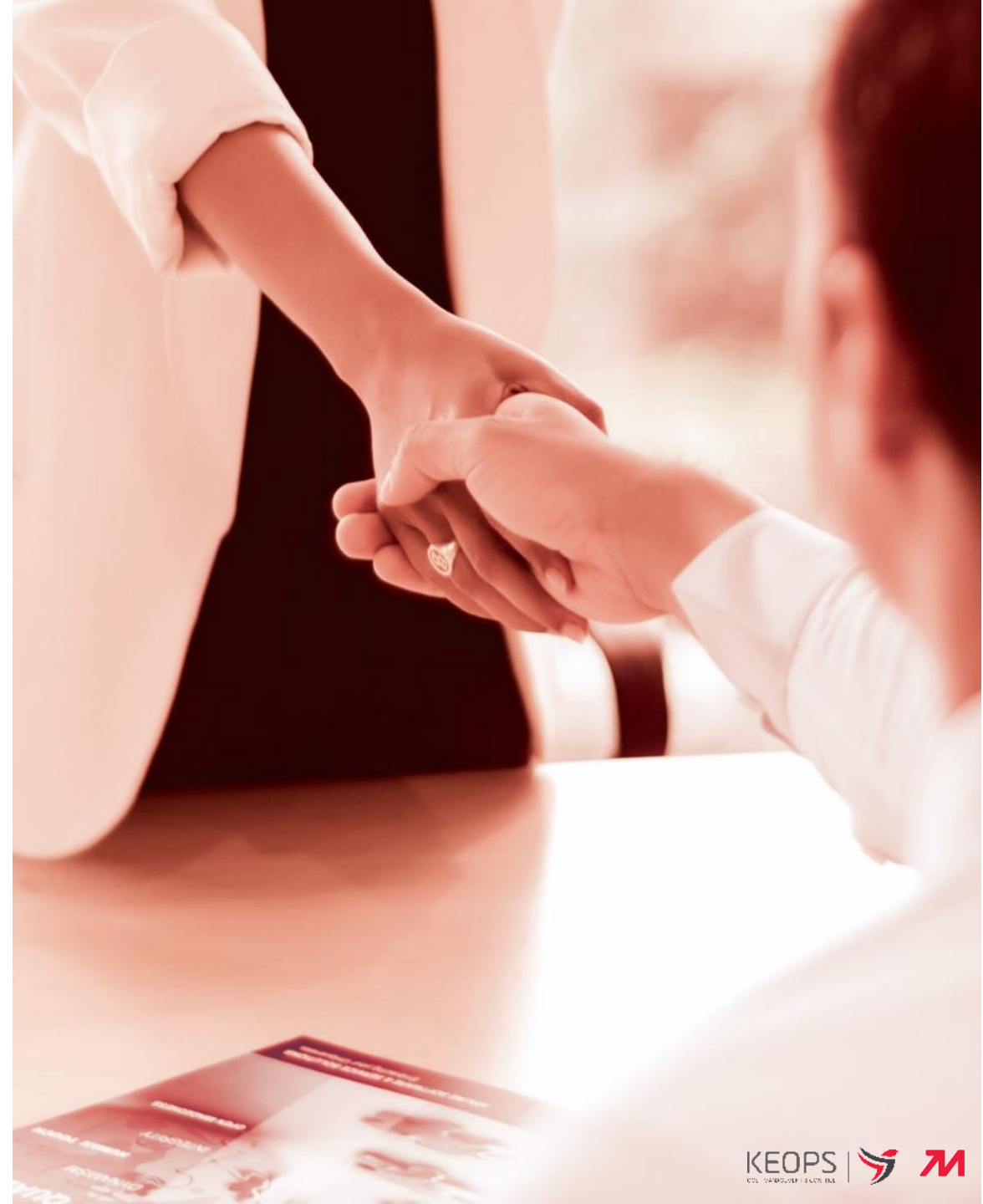


→ Can you identify errors on your supplier invoices?

→ How much overbilling do you experience annually, and how much are you able to recover?



IF YOU CANNOT ANSWER, CONTACT US!



**maureva**

THANK YOU

# Workshop

“The moment to act for African airlines: distribution freedom today, retailer tomorrow”



**Mr. Jonathan Newman,  
VP Business  
Development - Accelya**





**13<sup>th</sup> AVIATION  
STAKEHOLDERS  
CONVENTION**  
11-13 May 2025 | Kigali, Rwanda  
**RwandAir**  
For the passion of Africa

**accelya**

# The moment to act for African airlines: distribution freedom today, retailer tomorrow

Better Skies for Africa



# Who is on stage?



## Proven at scale


 **> 50%** NDC worldwide transactions. **33.5 Bn** offers per day.


 **\$100 Bn** financial transactions settled in financial year 2023-2024

 Delivering software and digital transformation for **100+** leading airlines

## Powered by AWS



 Bringing the retail cloud, scalability and powerful AI services to airlines

 Proven, resilient, future-ready capabilities

## accelya

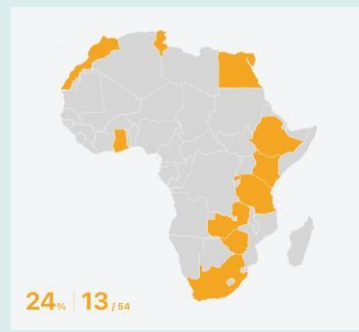
*The Airline-First Software Platform*

We empower airlines to delight their customers by enabling retailing freedom through the most trusted and open platform

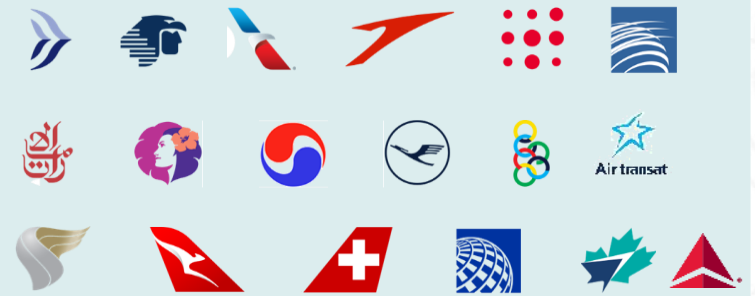
## Hi, I'm Jonathan



From UK, lives in Barcelona, loves running and exploring



## Trusted by the world's leading airlines





In 1987 the 747-400 launched  
Today there are only 14 operating

# Global Distribution Systems

TRAVELPORT Sabre amadeus

In 1987 the GDS went mainstream  
Today they create +80% of bookings

In the past 38 years



accelya

M-KOPA

Triply.co

ZaNiheza  
Travel

Wakanow

# Global Distribution Systems

TRAVELPORT Sabre amadeus

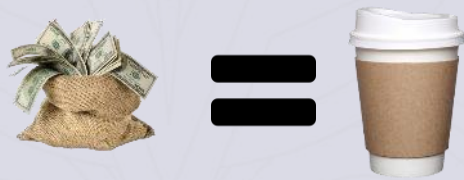
The travel industry globally and in  
Africa has moved on

But airline distribution in Africa  
remains the same

# When the music changes, so does the dance



## Economic



Profitability equals a cup of coffee

## Customer



Higher demands than ever

## Society



Fast-evolving society powered by tech

## Uncertainty



Unprecedented times



**Today**

**Distribution  
freedom**

**Tomorrow**

**Airline  
retailer**

# Two major African airlines are taking this approach



Launching in May



**AIRLINK**

Launching in June





For airlines

Distribution  
freedom means  
taking control

Control means lower cost,  
more money, better brand



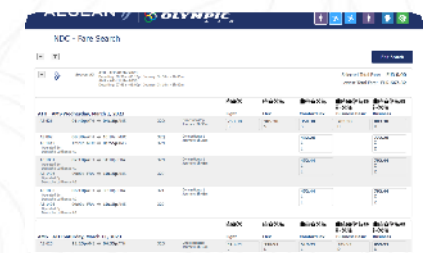
For airlines

Distribution freedom means taking control

No dependence on one channel



Direct connect portal



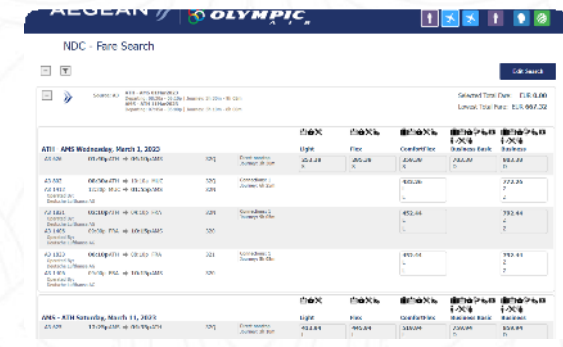
API

For travel sellers

Faster training, faster sales

Better experience,  
more revenue and  
happier customers

LN	FARE BASIS	OW	EUR	RT	B	PEN	DATES/DAYS	AP	MIN	MAXFR
01	GS500ALG				58	G NRP	- - + - + 12M R			
02	XS500ALG				69	X NRP	- - + - + 12M R			
03	VS500ALG				85	V NRP	- - + - + 12M R			
04	GS50BALG	53				G NRP	- - + - + 40 - R			
05	RS500ALG				107	R NRP	- - + - + 12M R			
06	GT70ACNB				107	G NRP	- - + - + - R			
07	GS500BST				108	G NRP	- - + - + 12M R			
08	XS50BALG	59				X NRP	- - + - + 35 - R			
09	XT70ACNB				118	X NRP	- - + - + - R			
10	XS500BST				119	X NRP	- - + - + 12M R			
11	TS50ALG				121	T NRP	- - + - + - 12M R			
12	GT70BCNB	65				G NRP	- - + - + - R			
13	NS500ALG				131	N NRP	- - + - + - 12M R			
14	VT70ACNB				134	V NRP	- - + - + - R			
15	VS500BST				135	V NRP	- - + - + - 12M R			



The screenshot shows a flight search interface with the following details:

- Search Criteria:** AFD Wednesday, March 1, 2023
- Search Results:** A table of flight options with columns for Airline, Flight Number, Class, Price, and Status.
- Summary:** AFD Thursday, March 2, 2023
- Summary Table:** A table with columns for Airline, Flight Number, Class, Price, and Status.

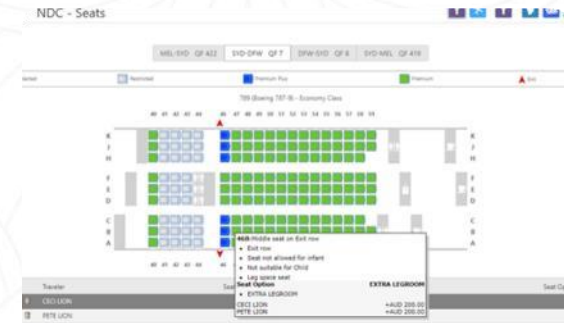


For travel sellers

Better experience,  
more revenue and  
happier customers

Easier ways to sell more

```
SM AA 1303/M/18AUGMIAMEX/V
SM AA 1303 M 18AUG MIAMEX 319
Y 0 B Y Y Y + + Y B 0 Y
9 Y Y Y Y Y Y 9
10 Y Y Y Y Y Y 10
11 < Y Y Y Y Y Y > 11
12 < Y Y Y Y Y Y > 12
13 < + + + + . + > 13
14 <E Y Y Y Y Y Y E> 14
15 < Y Y Y Y Y Y > 15
16 < Y Y Y Y Y Y > 16
17 < Y Y V Y Y Y > 17
18 < . . + . . . > 18
19 . . . . . 19
20 . . . . . 20
A B C D E F
. AVAILABLE <> WING F GEN FACI K GALLEY E EXIT C COT
+ OCCUPIED - LAST OFF H HANDICAP Q QUIET G GROUPS F PET
V RESTRICTED B BULKHEAD V PREF.SEAT X BLOCKED L LEGROOM U UMR
```



# Accelya leads the industry in NDC and retailing



Over 50% of all NDC

Serving the worlds leading airlines and enabling transformation

Leading the change



250+

direct connections to agents and aggregators globally



Up to 80% adoption rate by our customers



50k+

active IATA agencies



3X increase in bookings by working hand-in-hand with our airline customers



# Why does this matter for airlines in Africa?



4

Of the 77 airlines on the IATA NDC registry are based in Africa

Same as in 2024!

88%

Of airline sales in Africa are made via legacy channels

More than any other region

Over 25,000

Number of travel agents in Africa

Fastest growing globally

\$1

Per passenger profit for African airlines in 2025

\$6 lower than global average

# Why does this matter for airlines in Africa?



**Change is coming**

**Don't just  
take our  
word for it**



# What do airlines in Africa need specifically?



~~Complex, costly & time-consuming implementation~~

~~Overwrought technology and approach~~

~~Lengthy and complex API onboarding~~

Distribution Freedom in Africa

NDC has been slow to grow in Africa

# What do airlines in Africa need specifically?



**NDC ticketing enabled at speed**

-----  
**Refined scope based on what airlines need**

-----  
**API partner onboarding from 2 weeks**

**Distribution Freedom in Africa**

**Speed to value,  
relevant cost,  
ease of use**

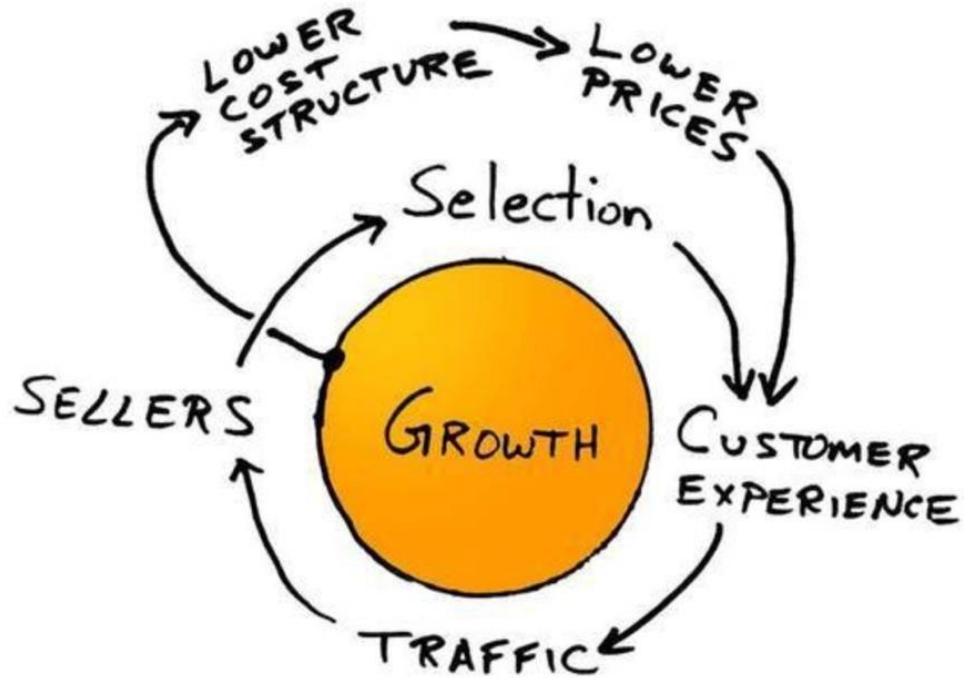
# What comes next?



Legacy tech can't fulfil future

Airline as retailer

**Simplified commercial operations & better revenues**



# Where do I start?



**Free consultation**

**Taking advantage of  
Distribution  
Freedom has never  
been easier**

**Connect with me**



**Contact us**





**13<sup>th</sup> AVIATION  
STAKEHOLDERS  
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 **RwandAir**  
by the president of Africa

**accelya**



# THANK YOU

Let's talk about  
distribution freedom

Better Skies for Africa



**13<sup>th</sup> AVIATION  
STAKEHOLDERS  
CONVENTION**  
11-13 May 2025 | Kigali, Rwanda  
**RwandAir**  
By the name of Africa

# Networking Lunch

**13:10 – 14:30 hrs**

Better Skies for Africa





**13<sup>th</sup> AVIATION  
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CONVENTION**  
11-13 May 2025 | Kigali, Rwanda



# THANK YOU

Place your title text here

Better Skies for Africa