



AFRICAN DEVELOPMENT BANK GROUP  
GROUPE DE LA BANQUE AFRICAINE  
DE DÉVELOPPEMENT

INFRASTRUCTURE AND URBAN DEVELOPMENT DEPARTMENT



# INTEGRATED AVIATION TRANSFORMATION PROGRAM (IATP) FOR AFRICA

## Airlines, Capital and Connectivity Forum, Mercure Nairobi Upper Hill – Nairobi, Kenya – 25-26 February 2026

### Context

Africa's aviation sector represents only 2–3% of global traffic despite accounting for 18% of the world's population, creating a structural connectivity gap that costs African economies an estimated USD 50–100 billion annually in lost trade, tourism, logistics efficiency, and economic opportunity. As aviation demand is expected to triple by 2050, the continent faces an urgent need to modernize fleets, strengthen safety and regulatory oversight, and expand strategic airport and cargo infrastructure to support AfCFTA, Single African Air Transport Market (SAATM), regional integration, and global competitiveness.

However, airlines, airports, and air navigation systems remain underdeveloped due to persistent structural constraints, including:

- High aircraft financing costs (30–50% above global peers)
- Ageing and insufficient airline fleets (15–20 years on average)
- Insufficient MRO capacities, particularly in West and Central Africa

- Fragmented regulatory frameworks, slowing progress toward the (SAATM)
- A USD 20–25 billion airport and airspace infrastructure deficit
- Limited cargo, logistics, and cold-chain capacity
- High taxes and fees, e.g. Government and airport fees
- Lack of attractive financing options to airlines and airport operators

To address these bottlenecks, the African Development Bank is launching the Integrated Aviation Transformation Program (IATP) for Africa; a continent-wide modernization and financing platform aligned with the African Union's USD 30 billion Continental Aviation Infrastructure Investment Plan. IATP aims play a catalytic role through a USD 7 billion Aviation Finance & Connectivity Facility (AFCF) and to mobilize private and institutional capital at scale, unlock competitiveness, and deliver an integrated, safe, and climate-aligned African aviation ecosystem.

### The Strategic Response: IATP for Africa

The IATP is the Bank's flagship program to deliver continent-wide aviation modernization, supported by the Aviation Finance & Connectivity Facility (AFCF) the Bank's blended-finance engine designed to mobilize private, institutional, and concessional capital at scale. Through the AFCF, the program integrates aircraft financing, airport and airspace infrastructure, cargo logistics, safety oversight, and policy harmonization to accelerate the implementation of the Single African Air Transport Market (SAATM) and strengthen Africa's competitiveness.

The AFCF operates through two dedicated windows- The Pan-African Aviation Financing Platform (PAFP), focuses on fleet renewal and aircraft leasing solutions, enabling African airlines to access modern, fuel-efficient aircraft at competitive terms, while the Pooled Regional Sukuk Platform supports investment in infrastructure and airport services. Together, both platforms provide a structured pathway for mobilizing

investment at scale across the full aviation value chain.

IATP is structured around three core pillars:

- Policy, Safety, Sustainability & Capacity Building
- Airlines & Fleet Modernization through the Pan-African Aviation Financing Platform (PAFP)
- Infrastructure, Connectivity & Logistics

The program targets USD 7+ billion in aircraft financing and a full value chain of strategic airport, cargo, and airspace infrastructure investments over the next five years.

### Objectives

- Present the IATP architecture and highlight the Pan-African Aviation Financing Platform (PAFP) and associated financing and risk-sharing instruments.
- Facilitate structured engagement between African airlines and capital providers to align operational realities, risk perceptions, and bankability requirements.

- Identify and advance priority pilot transactions to support early implementation and demonstrate scalable aviation financing solutions.
- Strengthen collaboration across the African aviation ecosystem in support of connectivity, competitiveness, and regional integration objectives under AfCFTA and SAATM.

### Agenda

#### DAY 01 — Airline Economics, Fleet & Capital

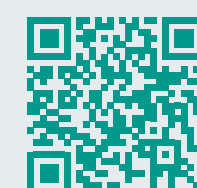
WEDNESDAY 25 FEBRUARY 2026

TIME	ACTIVITIES
<b>Theme: Understanding Market Realities and Mobilizing Capital</b>	
08:30 – 09:00	Registration & Networking Coffee
09:00 – 09:30	Opening Session: Africa's Aviation Imperative Opening Remarks: • Alex Ambition, Regional Director, East Africa, African Development Bank • Abderahmane Berthe, Secretary General, African Airlines Association (AFRAA)
09:30 – 10:00	Keynote: Africa's Aviation Growth Outlook
10:00 – 10:45	Airline Economics in Africa — What Drives Bankability
10:45 – 11:00	Coffee Break
11:00 – 11:30	Presentation: Introducing the IATP & AFCF Architecture
11:30 – 12:30	Lessor Financing — Making Africa Investable
12:30 – 14:00	Networking Lunch
14:00 – 15:00	Bank & ECA Financing
15:00 – 16:00	OEM Deep Dive: Fleet Renewal & Beyond the Aircraft
16:00 – 16:45	Cargo, Logistics & Trade Corridors
16:45 – 17:00	Special Remarks: • Tomoki Nakai, Executive Director, Japan, African Development Bank
17:00 – 17:15	Day 1 Wrap-Up Summary remarks by the session moderator and AfDB, highlighting key takeaways and previewing Day 2

#### DAY 02 — Infrastructure, Sustainability & Execution

THURSDAY 26 FEBRUARY 2026

TIME	ACTIVITIES
<b>Theme: From Strategy to Transactions</b>	
09:00 - 09:30	Morning Coffee & Networking
09:30 - 10:15	Airport & Airspace Infrastructure Financing
10:15 – 11:00	MRO, Training & Skills Development
11:00 – 11:45	Sustainability, SAF & Climate-Aligned Aviation
11:45 – 13:00	Networking Lunch
13:00 – 13:45	Local Taxes, Charges & Fiscal Policy
13:45 – 14:30	Aviation Insurance, Risk Transfer & Dispute Resolution
14:30 – 15:15	Blocked Funds & Repatriation Risk
15:15 – 15:30	Coffee Break
15:30 – 16:15	Transaction Workshop: What an IATP Pilot Deal Looks Like
16:15 – 17:00	Closing Panel: From Conference to Commitments
17:00 – 17:15	Closing Remarks: Mike Salawou, Director, Infrastructure & Urban Development, AfDB



**Registration link:** <https://forms.gle/QdW2b1vo9TZWYKtC8>

### Hotel Accommodation

We're pleased to offer a discount rate to stay at **Mercure Nairobi Upper Hill, Radison Blu** (Walking distance to the Workshop Venue) and **JW Marriot** (Shuttle Bus will be arranged). For those who're interested, please contact/book with AfDB Ms. **Lilian Achieng**, l.achieng@afdb.org

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