



ECONOMIC COMMISSION FOR AFRICA
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PROGRESS REPORT ON
ECA/ICAO'S STUDY OF AIR TRANSPORT IN AFRICA

1. Introduction

The requirement for the study of air transport in Africa now being undertaken by ECA/ICAO originated in certain recommendations which were adopted by the Eastern African Transport Conference in November 1962 and presented to the fifth session of ECA, held in Leopoldville between 18 February and 3 March 1963. In this session, after hearing an explanation of how the work might be carried out and on the understanding that ICAO would collaborate with the secretariat of ECA in doing the work, the Commission resolved "that the studies of the (ECA) secretariat being carried out on the development and co-ordination of all African air transport facilities should be intensified, ICAO being requested to give all possible assistance". The actual terms of reference and plan of the study, together with arrangements for the collaboration of ECA and ICAO, were left to be developed by the secretariat of the two Organizations. This was done on the basis of discussions in Addis Ababa and subsequent correspondence.

Following the basic understanding, it was further agreed that, first of all, a survey of the existing air transport facilities in the African region should be performed. An ICAO expert would perform this survey in the West and Northwest part of Africa, covering all the countries from Congo Leopoldville up the coast and terminating in Tunisia, and that the ECA expert would do the same in East and Northeast Africa, up to and including Libya.

The main difficulty in performing this task is to obtain statistical data on air traffic movements, by carriers, between each country, shown by destination and origin. This type of data is collected by the Departments of Civil Aviation from the carriers and is of a confidential nature, as disclosure of it could affect the commercial interests of the various airlines. The reliability of the information received, in view of the continuous changes in the air transport picture in Africa, should be looked upon as of a short-term duration. This is so because the situation in this regard, existing in some of the countries visited, and the future operating plans, undergo frequent changes caused by political or economic considerations.

3.A. List of countries surveyed by the ICAO expert

- Countries covered as at 31 December 1963:

Ghana	Central African Republic
Congo-Leopoldville	Cameroun
Congo-Brazzaville	Nigeria

- Countries to be covered as at 15 February 1964:

Dahomey	Upper Volta	Liberia
Niger	Mali	Sierra Leone
Togo	Ivory Coast	Guinea
		Senegal

- Countries to be covered after 1 March 1964:

Mauritania	Algeria
Morocco	Tunisia

B. List of countries surveyed by the ECA expert

- Countries covered as at 31 December 1963:

Kenya (EACSO)	Sudan
S. Rhodesia	Madagascar
Somalia	

- Countries to be covered as at 31 March 1964:

United Arab Republic

Libya

4. Processing of experts' field reports

As the experts field reports on individual countries are received in Montreal, they are analysed by ICAO economists and statisticians. This process involves checking the material for accuracy against data already available in ICAO from other sources (including the official ICAO Statistical Reporting Forms) and supplementing it with such additional material as may be obtainable. The advice of ICAO experts in such fields as training, personnel licensing, airworthiness and legal matters is sought where appropriate, and in this way as complete and accurate a picture as possible at this stage is developed for each country surveyed. All of this material is then co-ordinated and consolidated under various headings, so that a general view may be presented of the present situation of civil aviation in the region.

5. Draft outline of the study

The present intention is that the Study should cover the requirements of the African countries for air transport and, as far as possible, for other forms of commercial aviation. The Study should take the form indicated in the following outline:

I. Introduction

Requirement for the Study

Collaboration by ECA and ICAO

Terms of reference and objectives of the Study

Area covered by the Study

Methods of work and sources of information

II. Survey of existing air services - indicating route stages, flight frequencies, types of aircraft operated, adequacy of

services, and plans for future developments, under the following sub-headings:

- A. Scheduled services
 - 1. Domestic services
 - 2. International services within Africa
 - (a) by national carriers
 - (b) by foreign carriers
 - 3. International services extending beyond Africa
 - (a) by national carriers
 - (b) by foreign carriers
- B. Non-scheduled operations
 - 1. by national operators
 - 2. by foreign operators
- C. Freight services, mixed and all-freight
 - 1. Domestic
 - 2. International intra-African
 - 3. International extra-African

III. Demand for air transport

- A. Volume of passenger and cargo traffic carried in 1962 on mixed and all-cargo services
 - 1. International (intra and extra-African)
 - 2. Domestic
- B. Growth of traffic volume over previous five years
- C. Indications of future demand for passenger and cargo transport, taking into consideration, in addition to such factors as expected economic growth and the possible effect of reduced costs of air transport, the need to establish air services to foster general economic development.

IV. Air transport fleet

- A. Transport aircraft in service in latest year for which figures are available, showing total numbers of aircraft of each type and such characteristics as weight, payload capacity and cruising speed
- B. Transport aircraft on order, indicating year in which delivery is expected
- C. Future requirements for aircraft
 1. Types of aircraft required for intercontinental, regional and domestic operations
 2. Possible requirements for small, short-haul aircraft of moderate speed, capable of operating from short runways and operating economically on low-density routes.

V. Financial aspects of air transport

- A. Economic operating conditions
 1. Load factors
 2. Utilization of aircraft and personnel
 3. Direct operating costs
- B. Rates and fares
- C. Financial situation of the carriers

VI. Analysis of the ownership of airlines registered in the States

VII. Facilitation of the international movement of passengers, freight and mail

- A. Extent to which States implement the provisions of Annex 9 to the Chicago Convention and have notified to ICAO their "differences" from these provisions
- B. Extent to which national Facilitation Committees have been established

- C. Facilities at airports for the handling of passengers, baggage, freight and mail.
- VIII. Aircraft maintenance and overhaul - extent to which this is carried out in Africa
- IX. Training of air crew and ground personnel carried out in the States by government agencies, by operators, and through various technical assistance arrangements including fellowships
- X. International co-operation on air transport - An examination of the extent to which there is co-operation between African States and with States outside Africa, on both governmental and airline level, on such matters as
- A. Co-ordination or pooling on common international routes
 - B. Standardization and pooling of spare parts, engines, and equipment
 - C. Combined ground handling
 - D. Centralization of maintenance and overhaul facilities
 - E. Centralization of common technical services in the fields of airworthiness certification, personnel licensing, accident investigation, etc.
- XI. Aerial Work - A survey, to the extent that available data permit, of the present and possible future demand for aerial work in such fields as agriculture, forestry, public health, mapping, surveying of natural resources, planning civil engineering projects, etc.
- XII. Appendices, as required, including maps, tabulations and graphs, as well as additional information on individual countries.

6. Comments on the draft outline

It must be understood, however, that the outline above is tentative and assumes that there will be sufficient material available to permit adequate coverage of the various sections of the plan. When the field work now in progress has been completed, it may be found necessary to modify, delete or add certain parts. The study, being the first effort of that nature for the Region, may not lead to recommendations. Inevitably, however, it will point to certain conclusions which might, probably after further more detailed study by States, ICAO and ECA, provide a basis for recommendations concerning African air transport services. The value of these conclusions and the extent to which it will be possible to base recommendations on them will depend on the quality and completeness of the data on which they are based.

Some of the areas in which the study may possibly indicate conclusions may be outlined as follows:

- (a) new passenger or cargo services may appear to be required in certain areas, but such requirement would need to be examined in the light of a more detailed study of potential demand and of an analysis of the general economic needs of the area in question;
- (b) a requirement for new, more economical, short-haul aircraft may emerge, which would need to be examined in connexion with manufacturing and financing possibilities;
- (c) modification of rates or fares may appear to be desirable to encourage demand;
- (d) consolidation or rationalization of certain air route networks through pooling or other forms of airline co-operation may appear to be desirable, dependent on further detailed analysis of all the issues involved;

- (e) the information available may indicate that steps should be taken to develop a wider understanding of the uses of aerial work and to train personnel to carry out these activities;
- (f) the study may well indicate that there is a further need for centralized co-operative developments in such fields as personnel training, maintenance and over-haul, airworthiness certification, personnel licensing, accident investigation, and pooling of spare parts, etc., but specific action will have to be based on further more detailed studies.

7. Presentation of Study and action thereon

Assuming that the experts have completed their field surveys and that all of their country reports have been received in Montreal by the end of March 1964, it is hoped that the final draft of the Study can be completed by ICAO with direct assistance of both ICAO and ECA experts, and despatched to Addis Ababa before the end of May. Consultations between ICAO and ECA secretariats before and after that date will permit the establishment of the final version of the document, which will then be prepared and despatched in accordance with a timetable that will ensure that it is in the hands of all national administrations concerned at least sixty days before States are asked to consider it at any meeting. In view of the technical nature of the Study this time interval will be essential to permit national civil aviation experts to give adequate attention to its various parts. It would also appear to be most desirable that the delegates who will be called upon to first consider the Study at a meeting, should be civil aviation experts who could then formulate views on the follow-up to be given to the matter.

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