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Reconnecting Africa to Global Travel and the International Community

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Summary



Context

- Despite lower case numbers and fatality rates, travel from Africa to the rest of the world has been massively restricted.
- These travel restrictions are having a serious impact on Africa's aviation and travel and tourism (T&T) sectors and in turn could potentially impact its ability to recover economically from the pandemic.



Key Findings

- Overall restrictions on global mobility have started to decline, with East Africa and the Horn of Africa region opening up the most.
- But medical-related travel restrictions (e.g., 14-day quarantines) are increasing.
- Africa receives 51% of its tourists from Europe, and with virtually no safe travel corridor established between the two continents, the future of the aviation and T&T sectors is in peril, despite many African countries having lower levels of infections and adopting stringent travel and testing protocols.
- If existing EU and UK travel restrictions remain, Africa could potentially lose more than 17.4 million jobs and \$120 billion in revenues towards GDP this year.



Recommendation

- Governments in Africa, the EU and the UK need to work together as quickly as possible to implement a travel framework and protocols involving social distancing, testing and contact tracing at airports and on flights; such a framework is essential to guide and manage the new normal of travel between continents in a way that ensures travellers' safety and rebuilds trust.



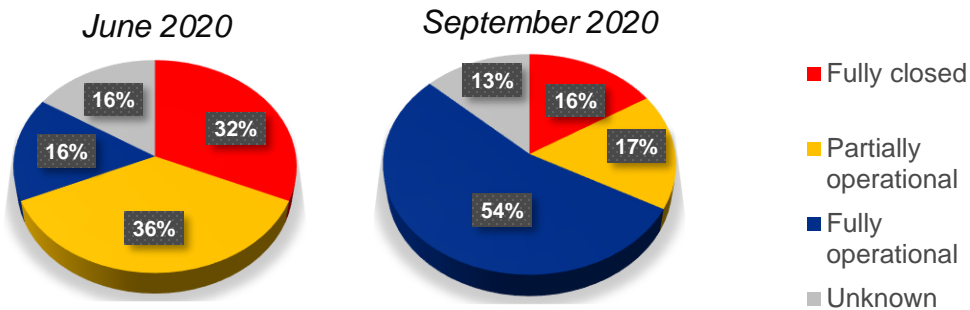
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1. Global Restrictions on Mobility

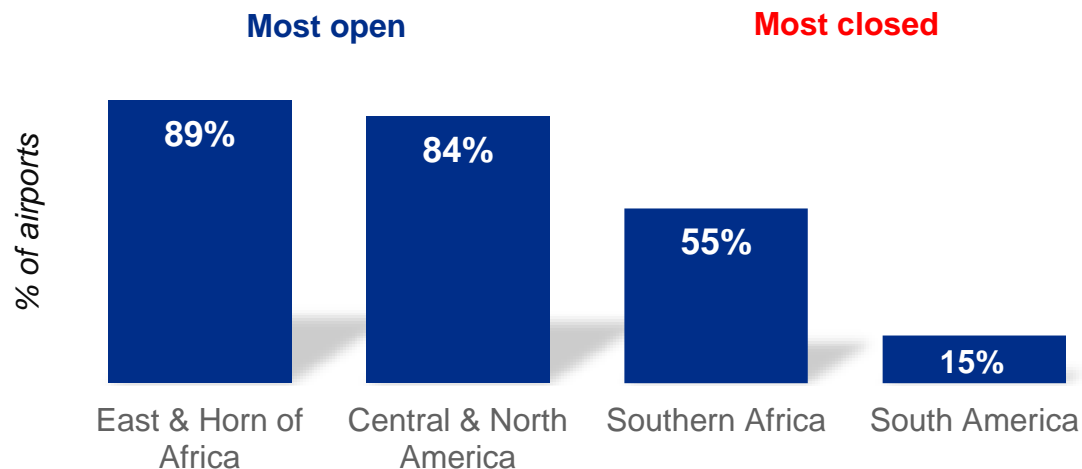


Governments around the world are opening their airports to jumpstart travel and, in turn, their economic recovery

Operational Status of IOM-Assessed Airports Globally



Regions With Highest to Lowest Share of Open Airports

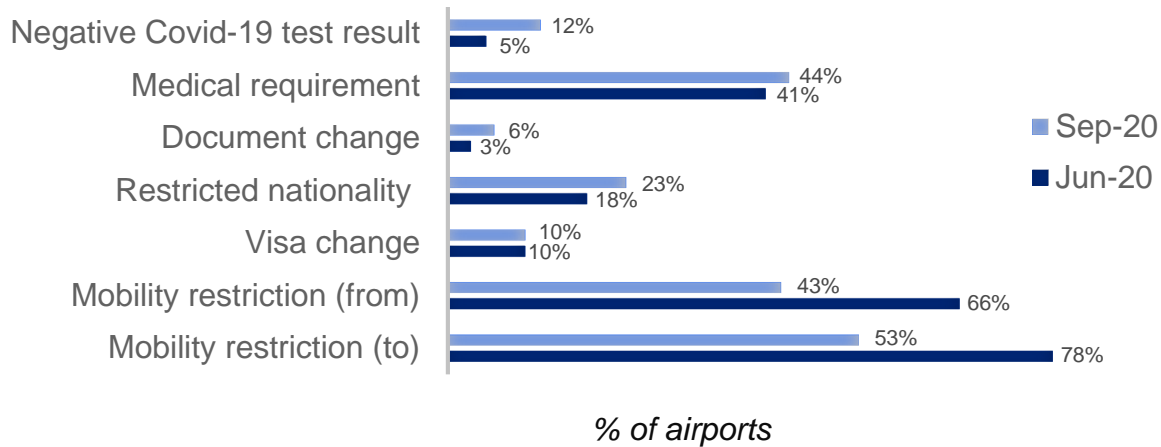


- With more than 35 million Covid-19 cases and 1 million Covid-19 deaths, the pandemic continues to restrict global mobility.
- As of 23 September 2020, the International Organization for Migration (IOM) has assessed 975 airports in 168 countries, territories and areas for type and number of pandemic-related restrictions.
- Since June the number of fully operational airports increased by 38 percentage points, owing to government plans of jumpstarting economic recovery through encouraging passenger air travel and switching to cargo flights.
- The number of fully operational airports in the East Africa and Horn of Africa regions and the European Economic Area have significantly increased, whereas a larger share of airports in South America and southern Africa remain fully closed.

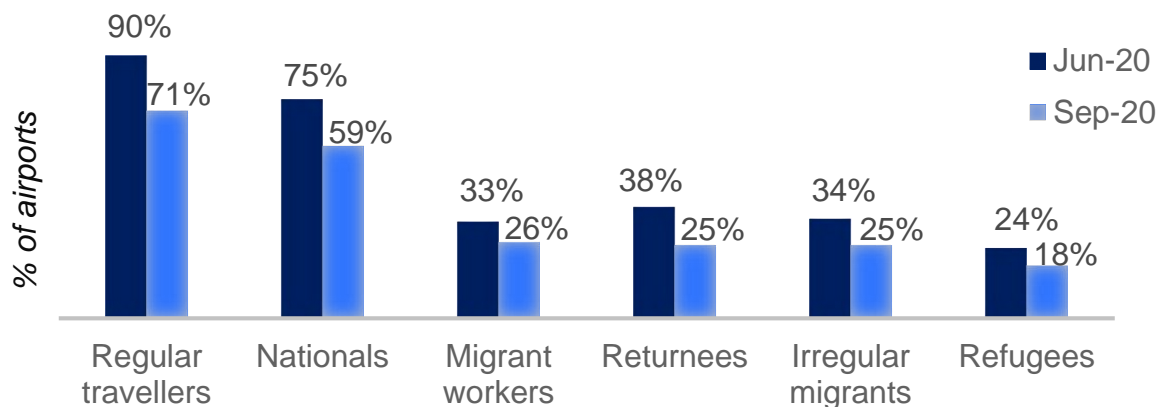


However, 14-day quarantine restrictions for arrivals are increasing globally and impacting aviation and travel and tourism (T&T)

Type and Percentage of Global Airport Restrictions



Impact of Global Airport Restrictions on Population Categories



- Complete mobility restrictions on landing and departing from airports remain the most common type of restriction, with 53% of airports restricting mobility to the airport.
- But while complete mobility restrictions declined in September (vs. June), medical requirements (e.g., quarantine) and restrictions targeted to specific nationalities increased, affecting 44% and 23% of global airports respectively.
- Increasingly, airports are reported to be requiring a medical certificate confirming a negative Covid-19 test result before departing and on landing.
- 14 to 30 days was the most common expected duration for medical-related restrictions (e.g., quarantine) at assessed airports.
- 71% of regular air travellers remain affected by global air travel restrictions, though other groups are also significantly affected.
- Since June, the EU and UK have implemented safe travel lists of and corridors with 37 and 59 countries and territories respectively, from which travellers will not be required to quarantine for 14 days.



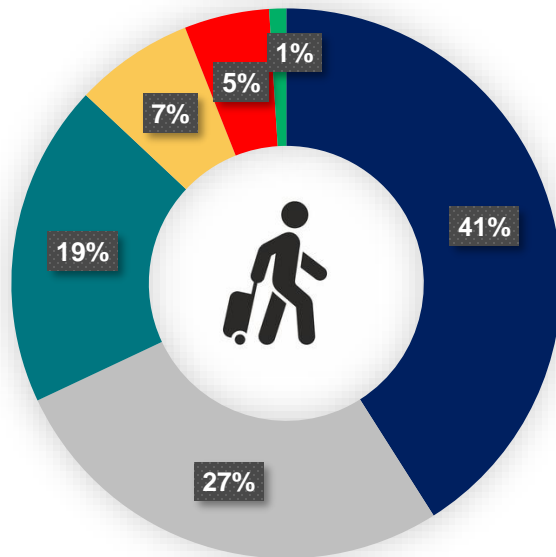
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2. Interdependence Between Africa and Europe

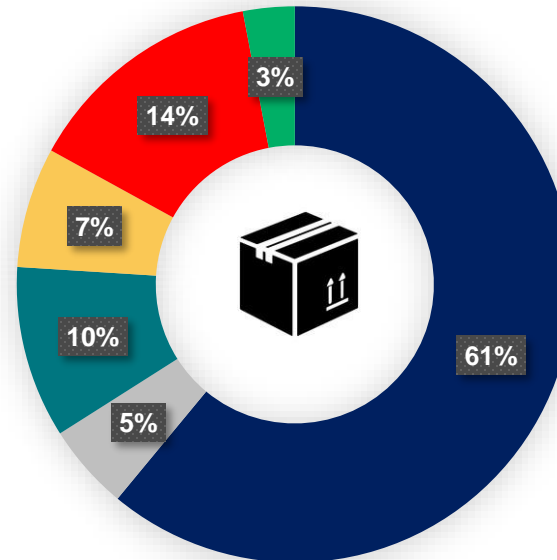


Europe is the prime destination for passenger air travel and cargo flights from Africa, and the biggest market for tourism

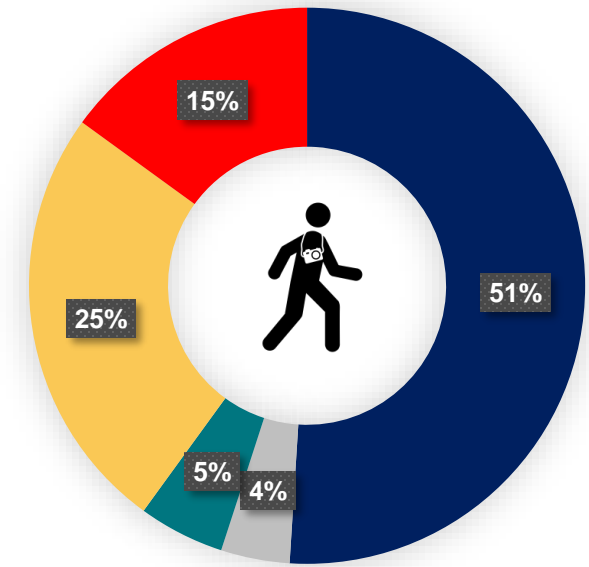
Passenger Traffic Departing Africa



E-commerce Cargo Departing Africa



Tourists in Africa



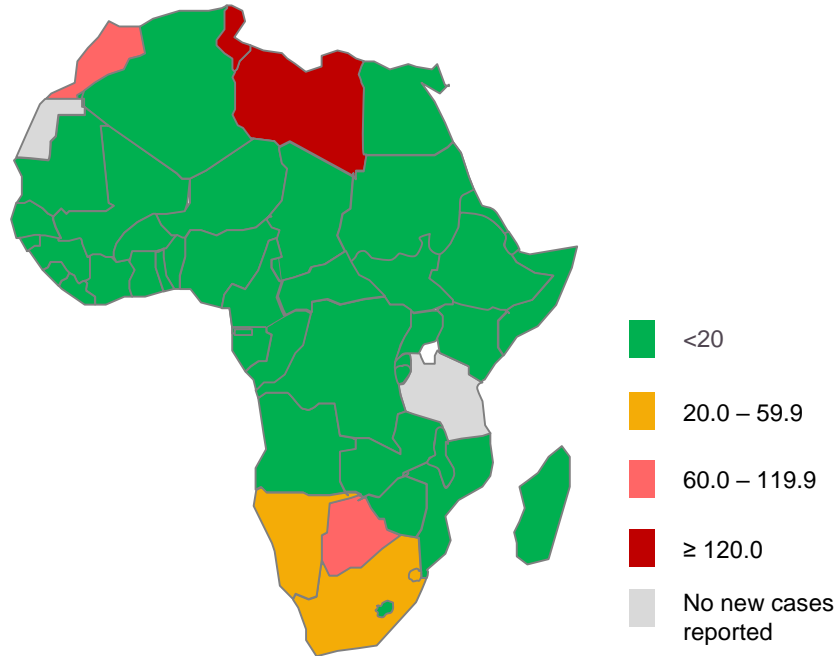
■ Europe ■ Africa ■ Middle East ■ Asia/Pacific ■ North America ■ Latin America/Caribbean

- In 2017, a total of 61 million international passengers departed from Africa with most travelling to Europe (25 million), followed by intra-Africa travel (16.5 million) and travel to Middle East (11.6 million).
- Approximately 3 million B2C e-commerce parcels carried by cargo flights in 2016 departed primarily to Europe (1.8 million); there were far fewer flights to North America (420,000) and Middle East (300,000).
- Europeans comprised the largest share of total visitors (51%) in 2019 followed by tourists from Asia (25%) and North America (15%).
- The geopolitical relationship between Africa and Europe has played a major role in the increasing economic interdependence between the two continents in the aviation and T&T sectors.

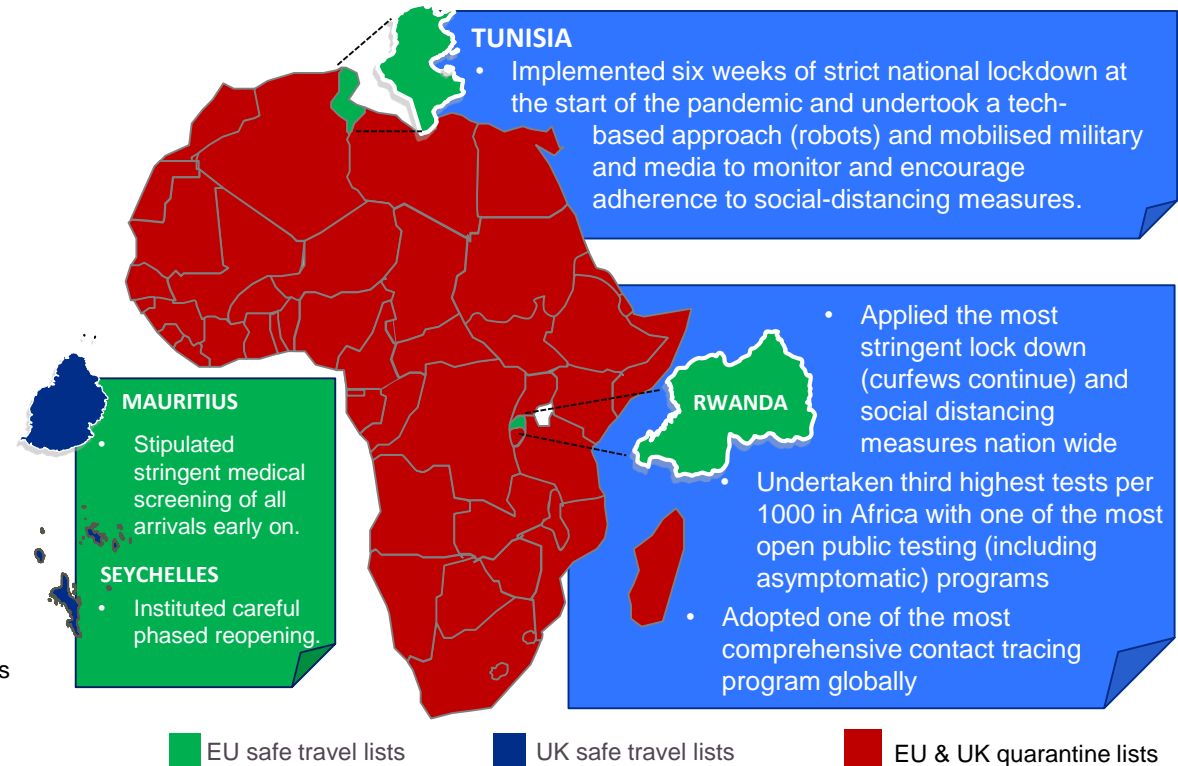


Yet the EU and UK mandatory 14-day quarantines for arrivals are being implemented disproportionately

Covid-19 Cases per 100,000 Population



EU & UK Safe Travel Corridors

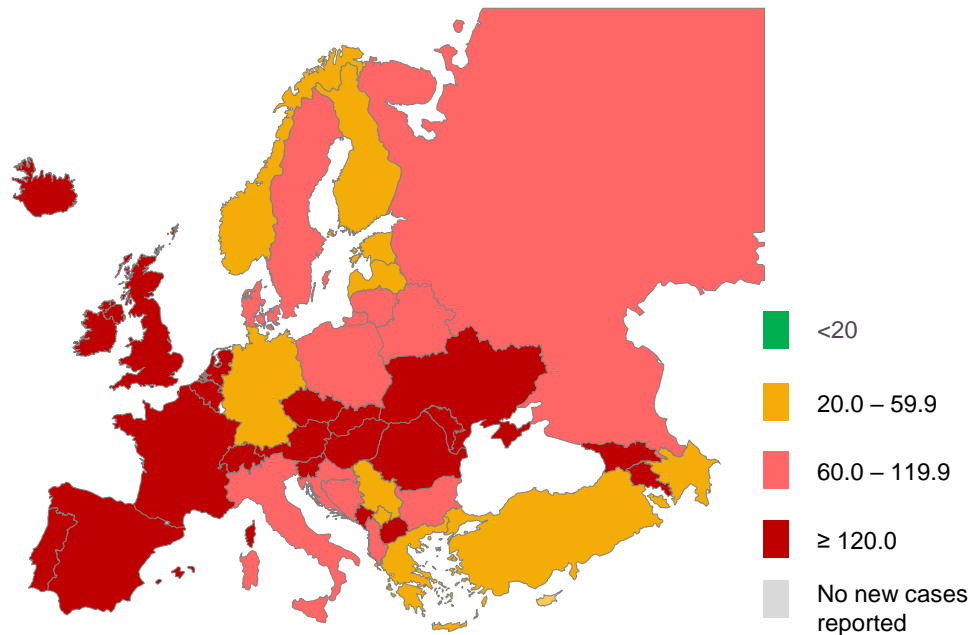


- In contrast to Europe's high number and incidence of Covid-19 cases and deaths, Africa's 14-day Covid-19 case notification rate per 100,000 is mostly below 20 and its total number of cases and deaths represents only 4.2% and 3.5% of global numbers respectively, with low hospitalisation rates.
- Despite Africa's lower Covid-19 numbers, the EU and UK have put in place 14-day quarantines and other medical travel restrictions for all arriving passengers from Africa except for Rwanda and Tunisia, which are on EU safe travel list, and the Seychelles and Mauritius, which have safe travel corridors with the UK.
- Given Europe is a key destination and market for tourism, commerce and trade for Africa, the continuation of mandatory 14-day quarantines for all arrivals could have an indelible impact on the continent's aviation and T&T sectors and, in turn, on its future economic growth and development.

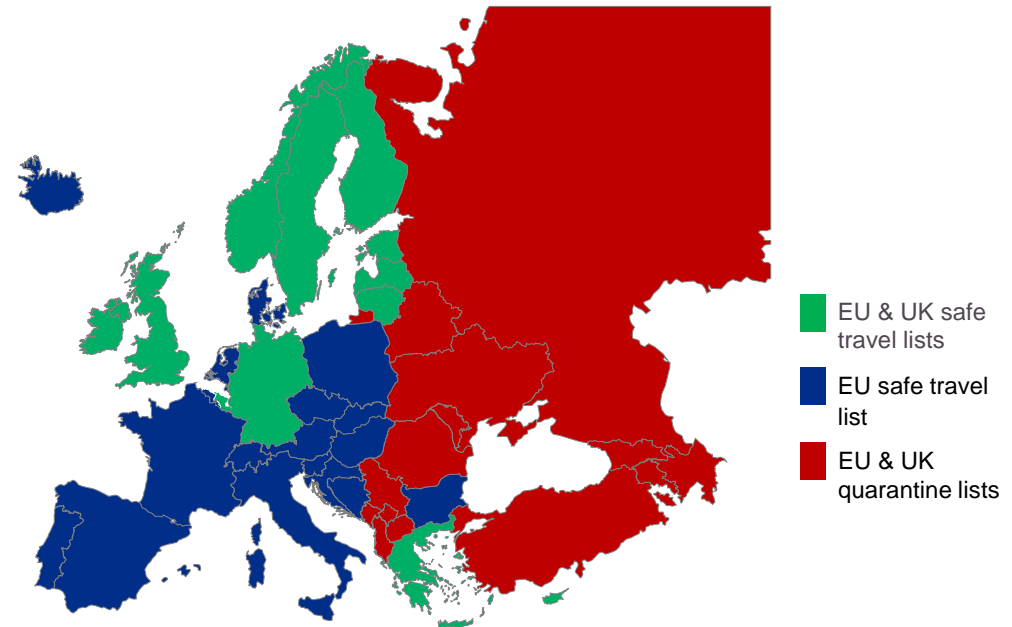


Despite higher numbers of Covid-19 cases, many European countries make it onto EU and UK safe travel lists

Covid-19 Cases per 100,000 Population



EU & UK Safe Travel Corridors



- As of 13 October, Europe's 14-day Covid-19 case notification rate per 100,000 is predominantly above 20 and its total number of cases and deaths represents 16.3% and 21.6% of global numbers respectively.
- The EU and UK's decision to add or remove a country from their safe travel lists (i.e., arrivals having to quarantine for 14-days) is triggered by whether it has fewer than 16 (EU) or 20 (UK) Covid-19 cases per 100,000 people.
- Despite having high numbers and incidences of cases and deaths, a number of European countries are on UK and EU safe travel lists, which appears to be driven by geopolitical reasons rather than epidemiological evidence.
- However, low- and lower-middle-income countries in Africa that are heavily dependent on Europe both geopolitically and economically, and have much lower numbers of Covid-19 case and deaths, are largely excluded from EU and UK safe travel lists and travel corridors.



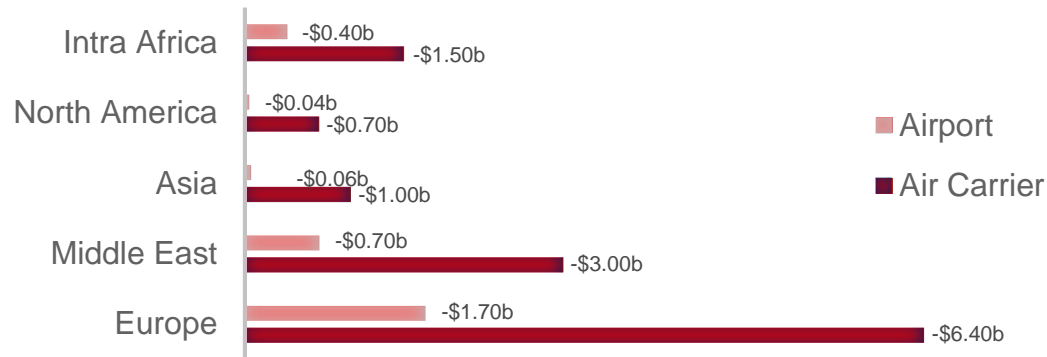
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3. Impact on the Aviation Industry

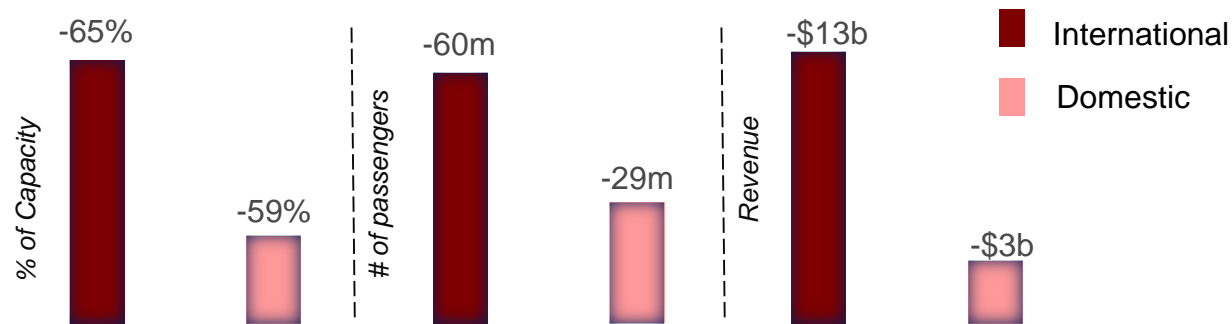


Continuation of EU and UK quarantine restrictions could potentially cost Africa's aviation sector \$13 billion in revenues

Year-on-Year Airport and Air Carrier Revenue Losses per Regional Route With Africa, January-August 2020



Forecasted Impact on International and Domestic Passenger Traffic and Revenues, Africa Region, FY2020

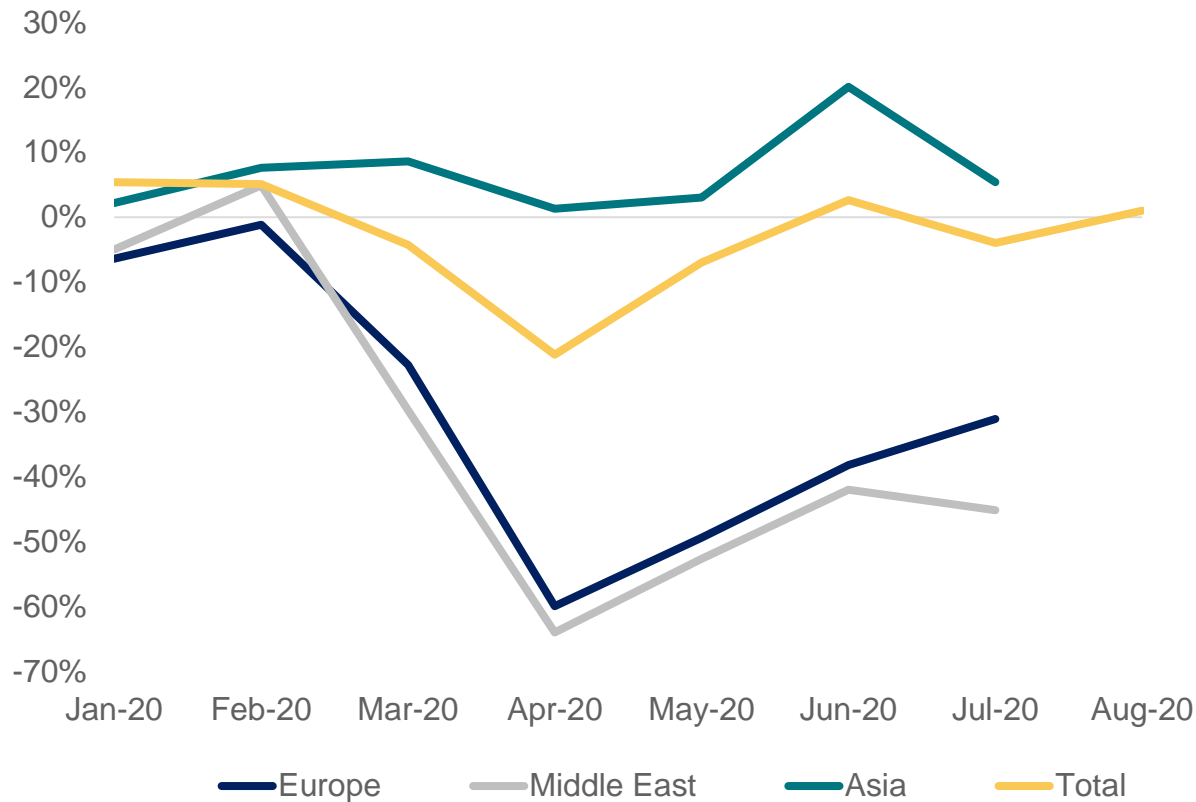


- Compared to 2019, airport and air carrier revenues for Africa as a whole decreased by \$1.8 billion and \$6.7 billion respectively in the first eight months of 2020.
- Routes between Europe and Africa contributed heavily to the decline in both airport (51%) and air carrier (59%) revenues.
- Historically, domestic markets within Africa for passenger air travel are smaller than other markets, making the recovery in revenues much more dependent on international markets, in particular the EU and UK, reducing or removing 14-day quarantine restrictions on travellers from Africa and developing safe travel corridors between European and African countries.
- If current 14-day quarantines for arrivals remain, it is forecasted that Africa's airline seat capacity for international markets will reduce by 65%, leading to a decrease of 60 million passengers and costing the aviation sector \$13 billion in revenues for the year 2020.



Asia helps African air cargo post year-on-year growth, but European routes remain far below 2019 levels

Africa Air Cargo Tonne Kilometres, Year-on-Year Growth



- Cargo tonne kilometres (CTKs)* across the world fell by 14% year-on-year (YoY) in August. However, for the fourth consecutive month Africa posted its strongest international cargo demand performance overall, with CTKs of African airlines growing by 1% YoY.
- This growth is primarily due to increasing investment flows and trade along the Africa-Asia route since the beginning of the year.
- One of the African air carriers that has led this strong performance is Ethiopian Airlines, which switched to transporting cargo to 70 destinations compared to just 10 pre-pandemic.
- While the resilience of the Africa-Asia route and the performance of Ethiopian Airlines will help with the overall recovery in Africa's cargo business, an increase in CTKs along the traditionally key Africa-Europe route will also be vital and depend on travel restrictions being reduced between the two continents.

*CTK measures the number of revenue tonnes of cargo (freight and mail) carried multiplied by the distance flown.



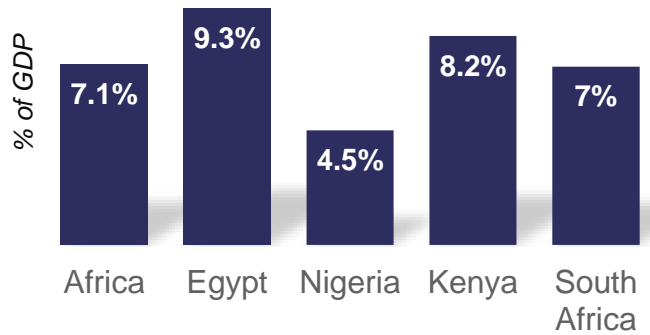
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4. Impact on Travel & Tourism

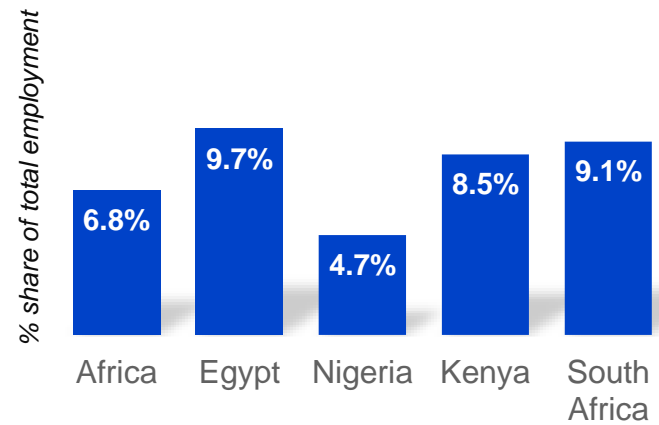


Tourism and travel directly accounts for 7% of African GDP and 7% of jobs and is indirectly key for the wider economy

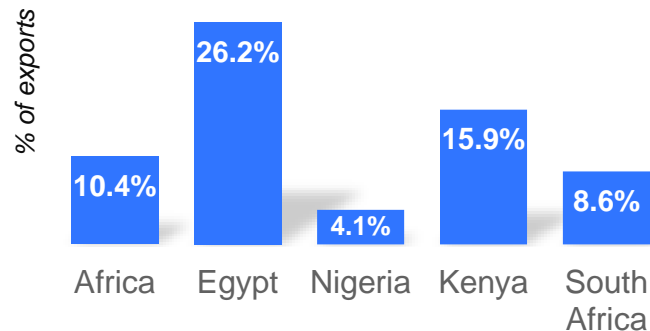
T&T Contribution to GDP



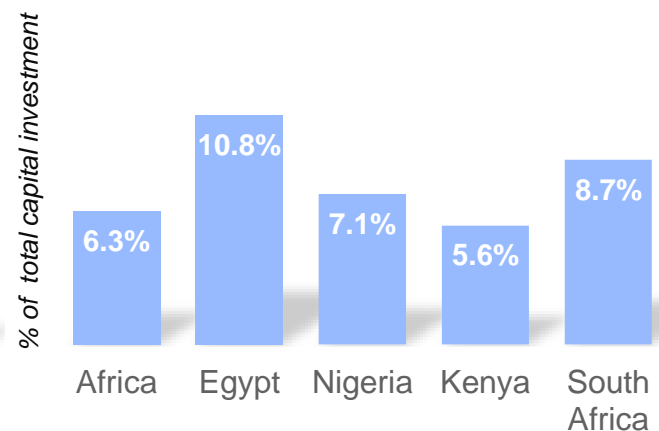
T&T Contribution to Employment



T&T Contribution to Total Export



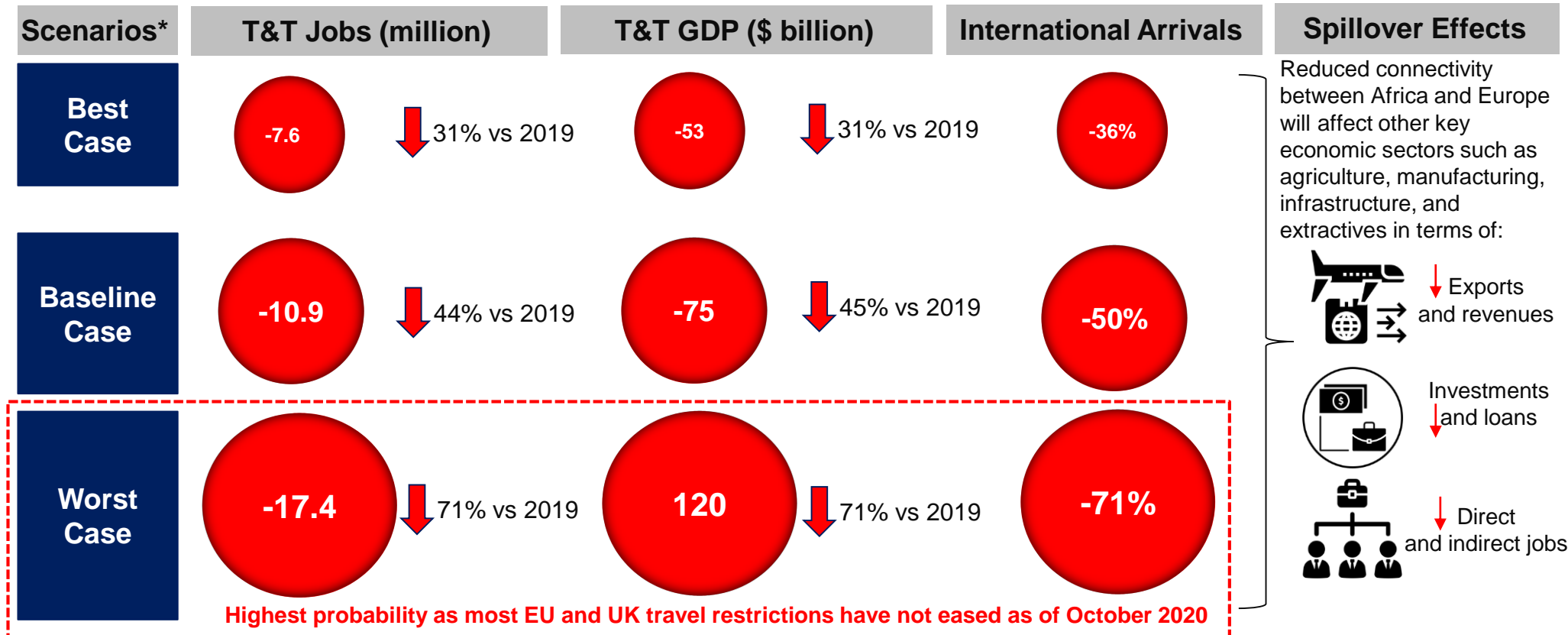
T&T Contribution to Investment



- In 2019, T&T contributed \$8 trillion towards global GDP and 330 million jobs worldwide.
- For Africa specifically, T&T contributed \$168.5 billion towards GDP, 24.6 million in jobs, \$61.3 billion in export earnings, and \$34.3 billion in capital investments.
- Africa's three biggest economies made the largest contribution of T&T towards GDP: Egypt (\$29.5 billion), South Africa (\$24.6 billion) and Nigeria (\$18.1 billion).
- T&T's contribution to GDP grew fastest in Tunisia (12.9%), Rwanda (10.9%) and Kenya (4.9%), owing to governments prioritising the sector and developing an enabling business environment where public-private partnerships and private-sector investment into T&T-related projects could increase.
- Over the years, the development and expansion of Africa's aviation industry has fuelled domestic and regional T&T in Africa; however for the T&T sector to continue growing and contributing to Africa's economic growth and development it will need to heavily depend on the unrestricted flow of travellers from Europe, the Middle East, and Asia.



Quarantining travellers from Africa could lead to more than 17.4 million jobs and \$120 billion in revenues being lost this year



- In June, the World Travel & Tourism Council forecast in its worst case scenario (i.e. the lifting of most global travel restrictions occurring late in the year) that the global T&T industry could stand to lose 197.5 million jobs and \$5.5 trillion in revenues towards GDP in 2020.
- With its T&T sector heavily dependent on international tourism, especially from Europe (51% of total tourists), the African continent risks losing even more than 17.4 million jobs and \$120 billion in revenues in 2020 if the EU and UK mandatory 14-day quarantines for arrivals remain intact for the rest of the year, and much more in early 2021, with massive spillover effects on exports, investments and jobs in other key economic sectors.

*Scenarios based on travel restrictions, in particular 14-day quarantine for arrivals, being eased from June and until end of 2020 on travellers from Africa.



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5. Adopting the New Normal of Travel



The EU and UK have supported Africa's health and economic responses, but they're not addressing a key bottleneck to recovery

Covid-19 Impact

Health



- 1.5 million+ cases
- 38,000+ deaths
- Only five African countries with cases more than 20 per 100,000

Economic & Social



- Economic cost of \$1.2 trillion
- 43 million+ people at risk of extreme poverty
- Household income reduced by 12%
- Mitigation costs 2.5% of GDP

Aviation



T&T



- International arrivals reduce by 71%
- 17.4 million+ job losses
- \$120 billion in GDP losses

EU & UK Support

- The EU provided €10 million to the Africa Centres for Disease Control (ACDC) for the implementation of the Africa Joint Continental Strategy for Covid-19 Outbreak.
- The UK invested £20 million in the African Union (AU) Covid-19 Response Fund.

- The EU (Germany, France and Italy) and UK have endorsed the World Bank and IMF's Debt Service Suspension Initiative (DSSI) to grant a number of low-income African countries debt-service suspensions to help them address the severe economic and social impacts of Covid-19.

- Despite lower cases and deaths, African nations (bar Rwanda and Tunisia) have been largely cut off from key international T&T markets by EU and UK.
- Continuation of these restrictions will significantly impact Africa's aviation, T&T and other key economic sectors and, in turn, its own ability to recover from the pandemic.

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EU & UK governments can support Africa's economic recovery by:

1. Working with the AU to develop an international framework for the new normal of travel between Europe and Africa.
2. Developing global protocols and standardising safety measures such as mask-wearing, testing and contact tracing, and quarantining for positive tests only at European and African airports.
3. Applying agreed standards consistently and removing and replacing quarantine measures with safe travel corridors for African countries that have epidemiological circumstances similar to countries on safe travel lists for the EU and UK.
4. Building a shared digital infrastructure for Covid-19 status, underpinned by standards and a trust framework. This will mean that travellers can get verified certification of test result or vaccination via QR code*, but it will require: linking of patient ID to travel IDs; results via international standards; a database of accredited labs; interoperability of travel data architecture; and privacy preserving model of records.



Three action sets for Africa and Europe to collaborate on in order to reconnect air travel

Ensure Safety*

- PRIORITY**
1. Stipulate a reduced quarantine time period for arrivals based on positive Covid-19 tests only.
 2. Implement health screening measures based on medical evidence, e.g. PCR tests on arrival/departure and installing full-body infrared scanners at various points in airport.
 3. Institute pre-arrival risk assessments or self-declaration electronic portals based on industry-wide standards for boarding.
 4. Digital framework adopted that provides test results or vaccination status via QR code* prior to departure. This is then verified throughout travel process points via APIs**, including by border agencies on arrival, but is privacy-preserving and does not provide any personally identifiable health data.
 5. Enhance sanitation facilities and increase cleaning and disinfection frequency throughout the airport and in airplanes with products approved by health authorities.
 6. Mandate mask use during flights.
 7. Limit physical interaction at all touch points across the airport and in flight.
 8. Undertake digital contact tracing in line with international standards for arrivals.

Rebuild Trust

- PRIORITY**
1. Develop operational and safety protocols for the new normal of travelling at airports and on flights. Consistently communicate them in advance with staff and travellers.
 2. Support ACDC efforts to create air travel system parity across countries.
 3. Train airport and airline staff in safety protocols and equip them with appropriate PPE.
 4. Provide approved alcohol-based hand sanitisers to travellers at appropriate high-traffic areas, either free of charge or at subsidised prices.
 5. Post signage throughout the airport and on flights informing travellers on enhanced disinfection and social distancing protocols.
 6. Encourage airports, airlines and travellers to increase the usage of contact-tracing apps.
 7. Create and broadcast an online registry for testing and eventually for vaccines.
 8. Robust protocols and standards that are universally adopted so that countries and individuals are confident in testing and vaccination records/infection status of fellow travellers.

Enable Policies

- PRIORITY**
1. Ensure blockages to issuance of short-term visas are lifted when other restrictions are.
 2. Reduce taxes and provide low-interest or interest-free loans on a case-by-case basis to airports and airlines in covering additional costs associated with implementing safety and operational protocols for the new normal of travelling.
 3. Communicate travel policy changes in a transparent and timely manner to airports, airlines, travellers and international governments.
 4. Expedite visas through simpler and cheaper processes and procedures for cabin crew and travellers where possible.
 5. Support airports and airlines to promote safe travel and tourism.
 6. Issue crew vaccine and testing visas.
 7. Work with international governments through both multilateral and bilateral channels to reduce travel restrictions, approve diagnostic innovations and safe travel corridors.

Ensuring airports and airlines reach the operational excellence in implementing the new normal of travel while guaranteeing safety and security experience for cabin crew and travellers will help Africa in developing more safe travel corridors with Europe and the UK.

**Based on safety measures undertaken and adopted by the governments of Rwanda, Tunisia, Mauritius and the Seychelles.*