



South-South Knowledge Exchange

AIR SERVICE DEVELOPMENT

REPORT ON THE KNOWLEDGE EXCHANGE EXPERIENCE

Madagascar and Cape Town, South Africa

Cape Town, 28th April – 1st May, 2019



Partners





Table of Contents

Introduction.....	4
The knowledge exchange	8
The study tour.....	10
Key lessons.....	19
Outputs and intermediate outcomes	22
Participant feedback.....	25
Annex 1. List of Knowledge Exchange Participants.....	27
Annex 2. List of Study Tour Speakers and Stakeholders Met	30

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The World Bank team:

Eneida Fernandes, Senior Private Sector Specialist, World Bank

Amy Chamberlain, Tourism Specialist, World Bank



Introduction

TOURISM AND CONNECTIVITY IN SUB-SAHARAN AFRICA

Broadly defined, tourism can be regarded as the world's largest industry, and one of the fastest-growing, accounting for over one-third of the value of global services trade. Tourism arrivals increased 7% in 2017, and Africa consolidated its 2016 rebound with an 8% increase in 2017. Tourism is economically important for at least 30 countries in Africa, globally representing 10% of GDP, and can also be a catalyst for growth of other sectors (e.g. agribusiness, handicrafts and creative industries). One in twenty of all jobs in Sub-Saharan Africa (SSA) are in the tourism sector and 50% of hospitality businesses in SSA are managed by women. The hospitality sector alone yields high development impacts in economies where tourism is important by providing critical business infrastructure, backward linkages to local suppliers and forward linkages to other industry-related fields. It is also an effective tool for addressing environmental protection, heritage conservation, at risk youth and community inclusion.

Africa's natural and socio-cultural resources match the growing demand of the international and intra-regional tourism market. Despite their significant potential, many countries in the region struggle to develop and sustain competitive tourism sectors. African countries are at different levels of development and main constraints to tourism development vary by country, but similar patterns of challenges and opportunities have been identified: poor data



and statistics, poor inter/intra-regional access and connectivity (i.e. visas, destination infrastructure and air travel), low capacity in digital marketing and knowledge of digital economy, and ineffective training facilities are just some of the common constraints holding the region back in tourism performance.

Air and road connections are the most commonly mentioned constraints to growth for tourism in SSA. Africa's distance from generating markets creates an acute need for higher quality and more competitive air access. While resolving the infrastructure investment needs of SSA countries is key, a well-developed air service development program is critical to ensure competitive cost, frequency, and routing of airlines in SSA.

MADAGASCAR AIR ROUTE DEVELOPMENT COMMITTEE

The Government of Madagascar (GoM) has set itself the ambitious target of welcoming 500,000 tourist arrivals by 2023. The GoM suggests that reaching this target could generate tourism receipts of up to US\$1.4 billion and result in a doubling of the number of direct jobs in hotels and tourism enterprises, and a direct contribution of tourism to GDP of 8%, in line with the average for other African countries and up from 5.1%.

In line with this target, the GoM has enacted an Air Transport Policy note which addresses opening of skies and facilitation for increased air connectivity. In parallel, the GoM has also successfully privatized the management of the two main airports of Madagascar (Antananarivo and Nosy Be) has secured a strategic partnership for its national airline, Air Madagascar.

Reaching this target requires, however, an active coordination of public and private stakeholders working in the air transport sector as well as private sector tourism stakeholders to ensure rationalization of international and domestic flights as well as a proactive air service development program that can lead to the envisioned improved connectivity. Government stakeholders such as Civil Aviation and the airport authority are already engaged in this objective.

In this context, under the World Bank Madagascar Integrated Growth Poles and Corridor SOP-2 investment project, a Route Development Committee for Madagascar is in the early stages of establishment. Members of the committee are already engaged in route development efforts through their respective organizations, but without a joint vision or clear implementation route. The initial goal of the committee is therefore to establish and implement a collaborative approach to increasing international arrivals to the country and to improve flight planning of domestic routes to integrate with arriving international flights.



CAPE TOWN AIR ACCESS

Cape Town Air Access (CTAA) is the focal point for international air route development in the Western Cape of South Africa, and signifies a collaboration between the Western Cape Provincial Government (WCG), the City of Cape Town (CoCT), Airports Company South Africa (ACSA), Cape Town Tourism (CTT), South African Tourism (SAT), Wesgro and private sector partners.

CTAA is housed within Wesgro, the official Tourism and Trade Investment Promotion Agency for Cape Town and the Western Cape. Wesgro divisions include Tourism, Trade, Investment Promotion, Research, Film and Media and a Convention Bureau. CTAA is a strategic project under Wesgro and is managed through a steering committee comprising representatives from all the project partners.

The primary goal of CTAA is to intensify and broaden Western Cape air access to targeted African and international markets to improve Western Cape economic competitiveness. The primary mandate of the air access team is therefore to promote, develop and maintain international air routes in and out of Cape Town International Airport through:

- ▶ Route retention (ensuring the success of existing routes);
- ▶ Route expansion (increasing frequencies and capacity on existing routes);
- ▶ New route establishment.

Since its inception in July 2015, Cape Town Air Access has contributed towards:

- ▶ Landing nine new international airlines, 14 new routes and 19 route expansions at Cape Town International Airport;
- ▶ Doubling international seat capacity at the airport, with 1.5 million seats;
- ▶ Leading to 16% international terminal passenger growth in 2016 and 20% growth in 2017;
- ▶ Growth of 52% in international air cargo in 2017;
- ▶ Estimated increase in direct tourism spending of R6 billion for the Western Cape Province.

As such, it is one of the world's most successful examples of an air service development program.



THE ESTABLISHMENT OF THE KNOWLEDGE EXCHANGE

Following the submission of a funding proposal and a competitive selection process, the World Bank's South-South Facility approved funding for a knowledge exchange between members of the nascent Madagascar Air Route Development Committee and Cape Town Air Access.

The knowledge exchange consisted of a group Study Tour to Cape Town, to meet with key CTAA personnel and other partners.

Participants in the knowledge exchange from Madagascar were:

- ▶ Tsitohaina Andriamanohera, Madagascar National Tourism Board (ONTM)
- ▶ Francois Xavier Mayer, Tourism Confederation of Madagascar (CTM)
- ▶ Patricia Rajeriarison, Ministry of Transport, Tourism & Meteorology, and PIC Project
- ▶ Paul Frédéric Andrianasitera, Madagascar Civil Aviation Authority (ACM)
- ▶ Todisoa Faustin Mboasalama, Aéroports de Madagascar (ADEMA)
- ▶ Jean-François Devaux, Tsaradia airline
- ▶ Jean-Marc Bourreau, IOS Partners
- ▶ Felirija Andrianatoavina, PIC Project

The group was led by Eneida Fernandes, Senior Private Sector Specialist, and Amy Chamberlain, Tourism Specialist, of the World Bank.

The following report describes the activities of the knowledge exchange and its key outcomes.



The knowledge exchange

GOALS

The goals of the knowledge exchange were to:

- ▶ Raise awareness of relevant constraints to air connectivity in neighboring countries and potential methodologies for addressing them;
- ▶ Enhance knowledge of best practices in air service development, related marketing, and the infrastructure implications of route development;
- ▶ Strengthen collaboration within the Madagascar Air Route Development Committee;
- ▶ Establish/enhance strategic relationships between the Madagascar Air Route Development Committee and key Southern African air transport regional partners.



LEARNING OBJECTIVES

By the end of the knowledge exchange, participants were expected to have a strong understanding of:

- ▶ How to establish and maintain effective public-public and public-private dialogue and collaboration for air service development;
- ▶ The optimal allocation of roles, responsibilities, resources and expertise;
- ▶ The importance of collaboratively setting strategic objectives and developing action plans;
- ▶ The fundamental components of an air service development strategy, including incentive policies, pricing, marketing incentives and activities, advocacy, etc.;
- ▶ Best practices in approaching and negotiating with airlines;
- ▶ The infrastructure needs related to air service development;
- ▶ The development of targeted marketing activities aligned with new routes.

EXPECTED OUTPUTS

Knowledge exchange participants were expected to work together to develop:

- ▶ A set of agreed, actionable next steps, based on best practices, for the Madagascar Air Route Development Committee to better structure itself and its approach;
- ▶ A Case Study document/presentation that participants can share among colleagues and other relevant stakeholders to further disseminate the lessons learned.



The study tour

PRE-STUDY TOUR

Knowledge exchange participants attended a Study Tour in Cape Town, from Sunday 28th April to Tuesday, 30th April, 2019.

Prior to the Study Tour, the World Bank team provided participants with a list of questions to guide their thinking and discussions while in Cape Town. See Attachment 1 for the full information kit provided to participants.

- ▶ What are the key lessons learned during the Study Tour?
- ▶ How will these lessons be important for you in your current role?
- ▶ Can a similar Air Service Development program be implemented in Madagascar?
- ▶ What are the key challenges that might be faced when trying to implement a similar program in Madagascar?
- ▶ Did the Cape Town program face these types of challenges? If so, how did they overcome them? How long did it take? Who was involved?
- ▶ How do you think you could contribute to addressing/overcoming those types of challenges if implementing a similar program in Madagascar?



- ▶ What public and private-sector organizations were involved in the Cape Town experience (e.g. airport, Tourism/Trade and Commerce Ministries, Convention and Visitors Bureau, Hotel Associations)?
- ▶ Are there comparable organizations in Madagascar? What are the key differences?
- ▶ What role did each of these organizations play in the Cape Town program?
- ▶ In each of those organizations, what human and financial resources were specifically dedicated to air service development?
- ▶ Was there any collaboration between Cape Town and other airports in South Africa to ensure complementary air service development efforts?
- ▶ Did bilateral agreements between South Africa and other countries (with airlines that wanted to serve Cape Town) need to be negotiated or modified? If so, how?
- ▶ What, if any, investment in facilities and airport infrastructure were made to attract new air service?
- ▶ Were there financial or non-financial incentives offered to airlines that launched new air service? What were they, and which organizations contributed to such incentives?
- ▶ Was there an accompanying customer service initiative/improvement program at the airport to promote repeat visitors? What did it involve?
- ▶ How was data of arriving and departing passengers captured, recorded and published for use in, and in support of, air service development and tourism promotion programs?
- ▶ What, if any, outside technical support has the Cape Town effort engaged in its air service program?
- ▶ What will be your role be in the Madagascar Air Route Development Committee?
- ▶ How can you best share the knowledge you have gained through this Study Tour? For example:
 - ▶ organize a presentation of the Study Tour findings to your colleagues;
 - ▶ organize capacity building/training sessions;
 - ▶ maintain contact with the Cape Town organization to obtain their ongoing support/advice;
 - ▶ invite representatives of the entities you visited during the study tour to your country, etc.



STUDY TOUR ACTIVITIES IN CAPE TOWN

Once in Cape Town, the group participated in the following activities.

SUNDAY 28TH APRIL

The group participated in a free historical walking tour of Cape Town.



Jean-Marc Bourreau, Chief Operating Officer of IOS Partners, led a working session entitled **Introduction to Air Service Development**. The session began with a presentation entitled “Air service development: Why and how?”, which explored the origins and purpose of air service development programs, as well as the necessary steps to be taken under such a program. Mr. Bourreau highlighted the potential of such programs to generate both more routes and “better” routes, for a more competitive tourism sector and more competitive airports.

Required air service development steps:

- Identify demand
- Revise bilateral agreements
- Identify potential airlines
- Conduct technical and financial feasibility studies
- Approach airlines with a business case



Following the presentation, the group discussed the study tour objectives, the agenda, and shared some initial thoughts on the air service development needs and challenges for Madagascar.



MONDAY, 29TH APRIL

The group met with **Paul van den Brink, Project Manager, Cape Town Air Access, Wesgro**, for an in-depth presentation on the **Cape Town Air Access program**. Mr. van den Brink described the program's purpose, structure, budget, methodology and key results, and over-viewed some relevant data for Madagascar. Key points included:

- ▶ The value of bringing together both the public and private sectors in air service development;
- ▶ The importance of having one single interlocuter responsible for engaging with airlines;
- ▶ The need to maintain and nurture relationships with existing airlines to ensure continued viability of their routes;
- ▶ The need for a full-time data analyst who is responsible for conducting the background work for (i) business cases for new airlines, and (ii) maintaining existing airlines and routes;
- ▶ The need for strong and innovative marketing programs to accompany new routes in both the origin and destination countries;
- ▶ The possibility that it can take years to land one new international route.



A new international route to Cape Town with three flights per week has the potential to create 3,000 new jobs for the province.

Source: AECOM study for Wesgro

Corne Koch, Head of Cape Town and Western Cape Convention Bureau, Wesgro, presented to the group on the significant role of the **MICE market for tourism development** in the Western Cape. Ms. Koch noted that good connectivity, as one of the first details a convention organizer will enquire about, is critical in developing a MICE sector. She also highlighted the successful alignment of the Convention Bureau’s marketing strategy with the Cape Town Air Access strategy – that is, by targeting only key markets with demonstrated demand and growth potential. By doing so, both bodies ensure that limited resources are used strategically and in a targeted manner.

Rick Taylor, International Tourism Consultant at The Business Tourism Company, discussed with the group the concept of **“The Picture of Success”**, whereby a tourism development effort must begin with a vision, benchmarks and indicators. Mr. Taylor stressed the need for an optimal combination of tourism volume, value, length of stay, geographical spread and seasonality in order to achieve optimal economic growth and job creation goals.



TUESDAY, 30TH APRIL

Tim Harris, CEO of Wesgro, presented to the group on Wesgro’s work on **air service development, trade and investment**. Of particular note was the description of Wesgro’s institutional model, which combines tourism, trade and investment promotion—as well as air connectivity as a strategic project—under one agency, allowing optimal convergence across the three.





The group participated in a **field visit to Cape Town International Airport** together with Paul van den Brink. The group was welcomed with a presentation from **Gavin Scott, Assistant General Manager of the airport**, which described the infrastructure expansion needs of the airport stemming from the successful air service development program.



Mr. Deon Nolan, the Manager of the Airport Management Centre, took participants on a tour of the airport's Management Centre, from which all airport operations are monitored. The group was struck by the airport's capacity to bring all service providers (e.g. airlines, security, customs) together to optimize efficiency and to enhance the entire airport experience for passengers.





The group completed questionnaires asking them to reflect on the field visit (see Attachment 2 for the questionnaire).

“It was very enriching. It allows me to take new ideas to our small airports”

“Success factors include a clear vision, institutions that clearly share tasks, strong competencies, lots of monitoring and shared information...”

“We could replicate the customer experience focus through collaboration between all institutions working at the airport”

“We need to be attentive to the experience of the passengers as a priority”

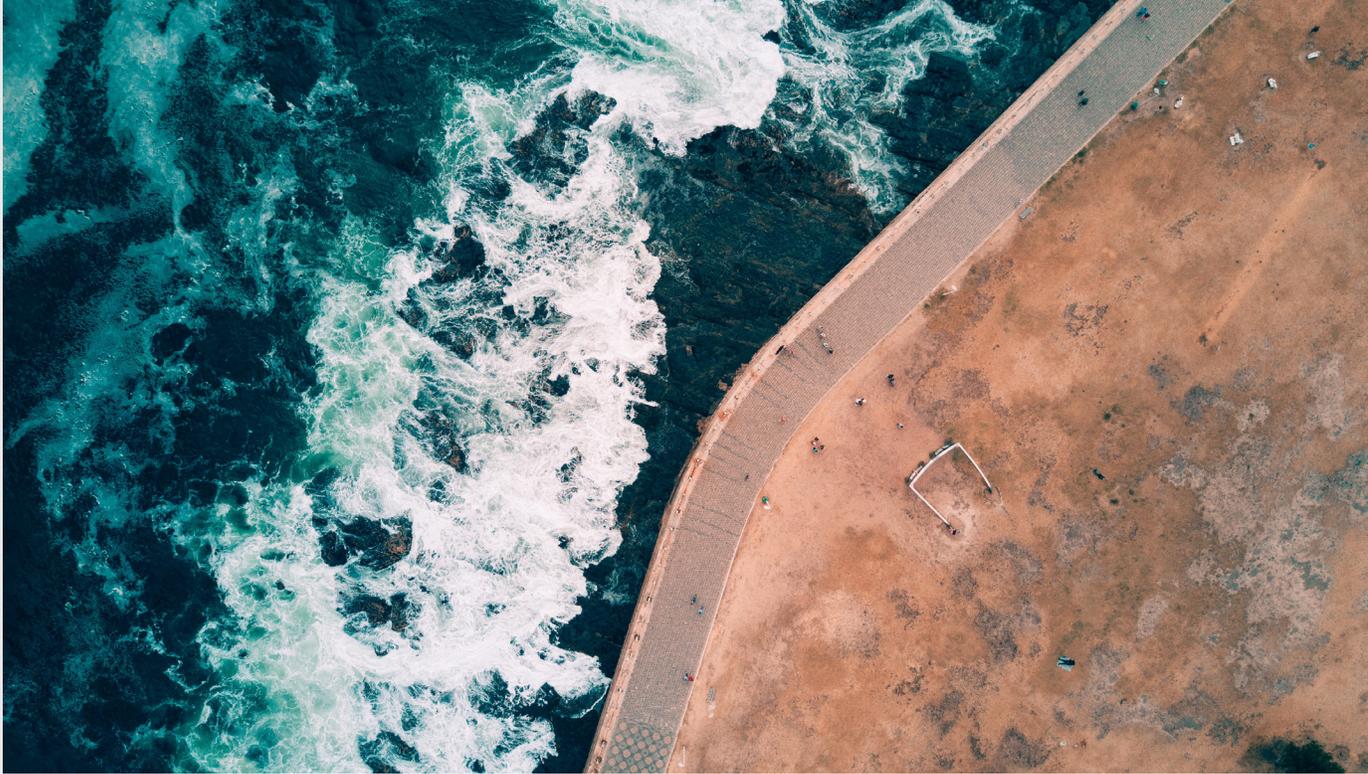
In the afternoon, the group engaged in a **joint action planning session** to establish key next steps in developing Madagascar’s air service. Specifically, participants:

- ▶ Performed rough calculations of the number and types of new flights, as well as optimization of existing flights, that would be required in order to reach the government’s target of 500,000 international arrivals. These calculations will help inform the setting of targets for the Air Route Development Committee.
- ▶ Scheduled a follow-up meeting among public sector members of the Air Route Development Committee upon their return to Madagascar.
- ▶ Agreed to prepare a summary of key findings and proposed next steps – including a number of specific “quick wins” – to be presented to the Minister of Transport, Tourism and Meteorology.

At the end of the Study Tour, participants completed a feedback questionnaire, which also asked about the key lessons learned during the knowledge exchange (see Attachment 3). Their feedback is described in the following two sections.



We must be ambitious, but start with small steps that allow stakeholders to work together



Key lessons

From their feedback on the study tour and subsequent discussions, the following emerged as the key lessons from the knowledge exchange:

- ▶ An air service development program should generally follow a standard set of steps, as follows:
 - ▶ Identify demand
 - ▶ Revise bilateral agreements
 - ▶ Identify potential airlines
 - ▶ Conduct technical and financial feasibility studies
 - ▶ Approach airlines with a business case.
- ▶ It is critical to establish a shared vision among relevant public and private air service development stakeholders, as well as agreeing on clear objectives and targets in reaching that vision.



The cohesion of a working group is very important, without a doubt



- ▶ Air service development should do more than just bring new routes. An effective air service development program should:
 - ▶ Maintain existing routes (through nurturing relationships with current airlines)
 - ▶ Develop existing routes (e.g. with greater load factors or higher frequencies)
 - ▶ Open new routes and bring new airlines.
- ▶ It is necessary to design an institutional framework for an air service development program that clearly describes roles and responsibilities of each of the stakeholders.
- ▶ It is highly advisable to designate one single interlocuter responsible for communicating with the targeted airlines and existing airlines.



For each new route you want to develop, you have to develop a business case

- ▶ An air service development program benefits from having a technical unit or working group responsible for the preparation of business cases to present to airlines, including a full-time data analyst.
- ▶ Business cases to be presented to airlines must include thorough analyses of demand data and economic analysis in order to prove the viability of a new route/new frequency, as multiple destinations will be competing for the airline's attention.
- ▶ It is highly beneficial to establish an air service fund with sponsors and partners to allow the program to offer incentives to airlines where necessary.
- ▶ An air service development program must engage in joint marketing and other innovative marketing approaches (e.g. media swaps) to promote a newly opened route or an increased frequency to ensure its quick uptake and sustainability.



The power of bringing numerous actors together



- ▶ It is necessary to closely monitoring an air service development program's success, using pre-defined indicators (e.g. increase in annual capacity, increase in number of airlines flying to the destination).
- ▶ Air service development can take a very long time to be successful, so patience is key and efforts should start as soon as possible.
- ▶ The MICE market holds significant potential for tourism growth, but strong air connectivity is needed as a first step in attracting that market.



The implementation of this work is in the interest of all of us, from average citizens to the operators and finally to the whole country

- ▶ Efforts to grow tourism and air connectivity can benefit significantly from a strategic alignment of tourism, trade, air connectivity and investment promotion efforts (e.g. by focusing resources across agencies on the few geographical markets shown to have the most potential).
- ▶ A tourist's experience begins in the airport, so strong customer service across all airport services is critical to visitor satisfaction.



Outputs and intermediate outcomes

When asked how they would apply the knowledge gained through the knowledge exchange, participant responses included:

“We will bring together a wider group, incorporating stakeholders from the airports, the Economic Development Board of Madagascar, and additional officials from the Ministry of Transport and Tourism”

“Given that working on route development is a new responsibility for me, I am going to try to adapt everything that I have learned here to Madagascar”

“I will first use it to sensitize our managers on the importance of everything I have learned here”

“I will study the possibilities of increasing the frequency of air arrivals”

Very soon after the completion of the knowledge exchange, two follow-up activities (described below) helped to (i) consolidate and validate the findings, (ii) bring the findings to a broader group of relevant stakeholders within Madagascar, and (iii) begin to apply the lessons learned through interactions with international air service stakeholders.

FOLLOW-UP PUBLIC SECTOR AIR SERVICE MEETING

Public sector members of the Air Route Development Committee of Madagascar – including those involved in the knowledge exchange – met for a working session in the week following the Study Tour to prepare a summary of their findings to be presented to the Minister of Transport and Tourism for his buy-in and action.

During the working session, participants listed the key lessons from Cape Town for Madagascar, to be discussed with the Minister. The group also prepared proposed next steps to be agreed with the Minister. These include:

- ▶ Updating the government’s Air Transport Policy Letter to better communicate the country’s air access development needs;
- ▶ Creating a Steering Committee, led by the Minister of Transport, Tourism and Meteorology;
- ▶ Defining a Five-Year Strategic Plan on Air Connectivity (2019–2023);



- ▶ Establishing a Technical Unit or working group consisting of a Project Manager, an Air Transport Specialist and a Data Analyst, with partnership and co-financing agreements with Ravinala Airports, Aeroports de Madagascar (ADEMA), and the private sector (e.g. tour operators, exporters);
- ▶ Implementing the Strategic Plan via the Technical Unit/working group;
- ▶ Updating bilateral agreements where required.

The meeting with the Minister is scheduled for June 2019.



The need for a long-term vision and sustainability of the program, and stakeholders working together to reach a common goal

PARTICIPATION IN THE INDIAN OCEAN TOURISM CONNECTIVITY FORUM

Six of the Study Tour participants attended the Indian Ocean Tourism Connectivity Forum, organized by the World Bank in collaboration with the Government of Mauritius, and in coordination with the Governments of Madagascar, Mozambique, and Seychelles, on 30–31 May 2019 in Mauritius. The Forum brought together policy makers, technical specialists and private sector representatives in the field of tourism connectivity from the Indian Ocean sub-region and across the Sub-Saharan Africa region, as well as internationally recognized experts in air transport, tourism development and visa facilitation, to:

- ▶ Share data, knowledge and experiences on air connectivity and visa facilitation, with a special focus on the Indian Ocean sub-region;
- ▶ Identify practical opportunities for enhancing tourism connectivity, including increased collaboration among countries;
- ▶ Disseminate best practices in promoting tourism competitiveness through air service initiatives and visa facilitation.

The Madagascar delegation to the Forum consisted of the knowledge exchange participants together with representatives of Air Madagascar and Ravinala Airports – other key part-



ners in the country's Air Route Development Committee. The knowledge gained through the Knowledge Exchange provided a strong foundation for participants to engage in technical discussions with international experts in air service development, airport management and international aviation regulation, as well as those responsible for route development in neighboring countries, during the Forum.

The delegation took part in the following sessions:

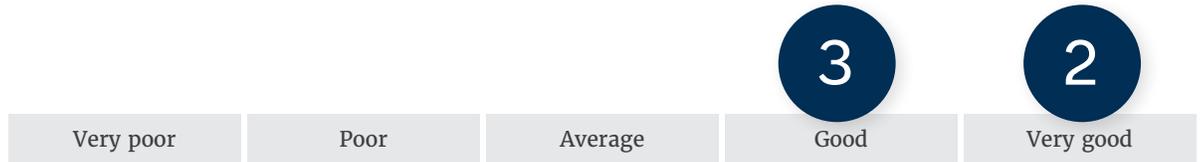
- ▶ **Using flight data to inform air service and tourism planning and decision making.** This panel presented best practice approaches to analyzing flight and tourism demand using large-scale datasets, including user-generated data, for elaborating air service and tourism development strategies.
- ▶ **Best practices in air service development for tourism growth.** This panel showcased international examples of optimal approaches to implementing regional-, country- and city-level air service development that balance the interests of governments, tourism industries and airlines. This included the Cape Town experience, but also introduced alternative models of air service development (e.g. Costa Rica, Atlanta International Airport).
- ▶ **Executive training on air service development.** This comprehensive executive training explored how to approach, design and implement a collaborative air service development program, drawing from international best practices and specific success stories. This training provided the delegation with even greater practical know-how and more tools for initiating their program.
- ▶ **Multilateral roundtable discussion on sub-regional air connectivity cooperation.** This closed discussion, for invited representatives of airlines and civil aviation authorities of Madagascar, Seychelles, Mauritius and La Reunion, ICAO and UNWTO, explored concrete opportunities for further air connectivity collaboration across the sub-region. As a result of this session, Air Madagascar and Air Mauritius are already initiating discussions on possible collaboration.
- ▶ **Breakout session on the findings of World Bank analytical work on air connectivity to Madagascar,** including identification of routes with burgeoning demand to be monitored for possible new routes, as well as new routes with sufficient demand for development. During this session, Air Madagascar expressed its openness to exploring the operation of a route identified as having clear unmet demand, and the delegation committed to exploring the other origin markets with burgeoning demand for potential future air service development efforts.



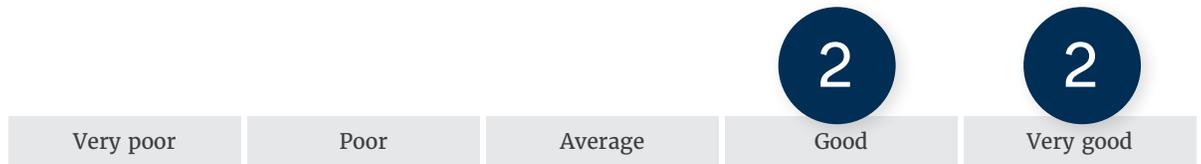
Participant feedback

See Attachment 3 for the survey distributed to participants.

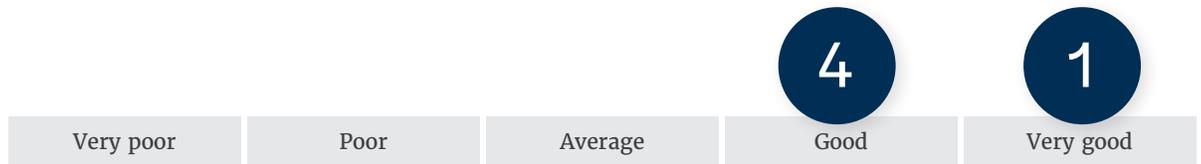
1. How would you rate the overall quality of the study tour?



2. How would you rate the overall usefulness of the study tour?



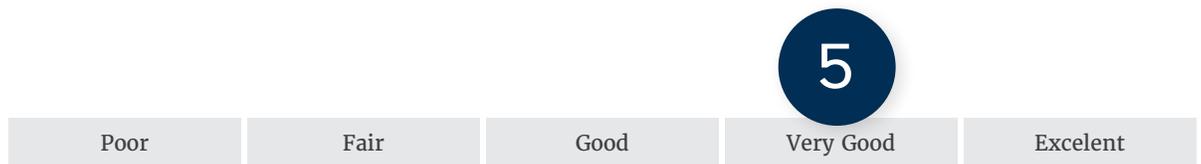
3. How would you rate the overall relevance of the study tour to your work?



4. To what degree did the study tour achieve the intended objectives?



5. How would you rate the knowledge providers?





6. Was the knowledge gained useful?



7. Was the time allocated to different sessions/field visits adequate?



8. What worked best during the study tour?

“The presentation of Cape Town Air Access by Paul. Thank you Paul!”

“The session “Introduction to Air Service Development” helped me to improve my understanding, which was previously a little fuzzy”

“The discussions between participants helped us with team building”

9. What would you recommend to improve the study tour?

“I would include a visit with the private sector on the same theme”



ANNEX 1

List of Knowledge Exchange Participants

Tsitohaina Andriamanohera, Madagascar National Tourism Board (ONTM)

Tsitohaina Andriamanohera leads the Madagascar National Tourism Board's market research and partnership division. The division advises relevant stakeholders on matters that impact Madagascar's tourism sector and the destination's global competitiveness, and leads the industry in times of crisis. Specifically, the team provides research, insights and support on air route development, evaluation of ONTM's marketing activities, engagement in strategic partnerships, and communication with stakeholders, media and staff. Tsitohaina has been with ONTM for 12 years. Contact: operation@ontm.mg

Francois Xavier Mayer, Tourism Confederation of Madagascar (CTM)

François Mayer, a trained pilot, leads the air transport agenda of the Tourism Confederation of Madagascar. He and his family have been involved in aviation in Madagascar for many generations. Their work has included creating one of the first airlines in the country, *Madagascar Air Service*, establishing an agency specialized in renting private planes, *Bora Fly*, and developing charter flights to various destinations in Madagascar. In 2015, François also served as National Tourism Advisor at the Ministry of Transport and Tourism. Contact: fx.mayer@gmail.com

Patricia Rajeriarison, Ministry of Transport, Tourism & Meteorology, and PIC Project

Patricia Rajeriarison is a private sector development specialist with 25 years of experience. For the past 17 years she has been specializing in tourism development, with a focus on the Indian Ocean and Africa regions. She has worked with institutions including the World Bank, International Finance Corporation, Netherlands Development Cooperation and Tourism Boards, as well as the private sector. Patricia currently serves as a Senior Tourism Consultant to the PIC project, and as a Technical Advisor to the Minister of Transport and Tourism. Contact: patricia@alterego.mg



Paul Frédéric Andrianasitera, Madagascar Civil Aviation Authority (ACM)

Paul Frédéric is the head of the Economic Regulation and Research Department at the Madagascar Civil Aviation Authority. In this role, he is responsible for conducting economic assessments of the aeronautical industry and monitoring air transport markets for compliance with relevant regulations. Paul Frédéric is also responsible for setting economic regulations for the aviation industry with the aim of promoting the industry's growth and development in accordance with the State's Air Transport Policy. Contact: FPHA@acm.mg

Todisoa Faustin Mboasalama, Aéroports de Madagascar (ADEMA)

Todisoa began his aeronautical career in 1997 as an internal auditor assistant at the Madagascar Airport Authority (ADEMA). Since 2004, he is the Head of the Statistics and Network Development Department at ADEMA, where he is responsible for exploiting ADEMA statistics for strategic decision making, conducting pricing studies on aeronautical charges, and strategizing for development of the air traffic network. Contact: stat@adema.mg

Jean-François Devaux, Tsaradia airline

Since 2017 Jean-François Devaux is the Managing Director of Tsaradia, the new subsidiary of Air Madagascar providing domestic flights in Madagascar. Jean-François has over 30 years of experience with international airlines. He held managerial positions with Air France for 18 years, including Regional Manager for West Africa in 1996-2000, as well as with the Union de Transports Aériens (UTA), Gabon Airlines and Ewa Air. Prior to joining Tsaradia, Jean-François was Executive Director at EWA Air, Mayotte. Contact: JF.Devaux@tsaradia.com

Jean-Marc Bourreau, IOS Partners

Jean-Marc Bourreau has nearly 20 years of professional experience in aviation strategic planning and operations as well as airport development and transaction advisories. Since 2011, he is the Chief Operating Officer of IOS Partners, Inc., a premier consulting company specializing in Aviation and Economic Development. He has led aviation projects in over 70 countries, including over 15 countries in Africa. He worked at the Juan Santamaría International Airport (San José, Costa Rica), from 2001 to 2008; first as a Quality and Environment Manager, and then as the Director of the Airport. During this period, the airport underwent a major construction program, was fully certified ISO 9001 and implemented a highly successful Air Service Development Program. Contact: jboureau@iospartners.com



Felirija Andrianatoavina, PIC Project

Felirija Andrianatoavina is the head of the Tourism Component of the Integrated Growth Poles Project (PIC Project), an initiative of the Government of Madagascar with financial support from the World Bank. The PIC Project supports the development of the tourism sector, including a component on air transport and connectivity in general. Support includes the improvement of regulatory frameworks, investment and advisory on airport infrastructure, and the development of air routes. These activities are carried out in collaboration with public and private sector stakeholders working on the development of air transport and tourism in Madagascar. Contact: felirija.a@pic.mg

Eneida Fernandes, World Bank

Eneida Fernandes is a Senior Private Sector Development Specialist at the World Bank in Madagascar, with more than 15 years of experience in private sector development for hospitality and tourism. Eneida is the Bank's Team Lead for the PIC project and for advisory work on enhancing air connectivity in the Indian Ocean. Eneida's work in the Africa Region with the World Bank has included supporting and preparing new operational projects and knowledge products focused on private sector development and tourism, including air transport. Her private sector background includes working in the hospitality sector as a manager and consultant; competency building for at-risk youth; implementation of best practices in sustainability; and operational capacity building and certification programs. Contact: efernandes1@worldbank.org

Amy Chamberlain, World Bank

Amy Chamberlain is a Tourism Consultant at the World Bank in Madagascar. She has seven years of experience supporting the public and private sectors in sustainable tourism development in the Africa and South Asia regions with the World Bank. In Madagascar, Amy works across the Bank's tourism and air transport portfolio, including the PIC project and regional advisory on enhancing Indian Ocean air connectivity. Contact: achamberlain1@worldbank.org



ANNEX 2

List of Study Tour Speakers and Stakeholders Met

Tim Harris, CEO, Wesgro

Tim Harris is the CEO of Wesgro, the Tourism, Trade and Investment Promotion Agency for Cape Town and the Western Cape. Tim previously served as Member of Parliament and Shadow Minister of Finance for the Democratic Alliance (DA). He holds a BA in English Literature and a Masters in Economics from the University of Cape Town. Tim currently sits on the board of the Cape Town Film Studios and Business Processing Enabling South Africa (BPESA).

Paul van Den Brink, Project Manager, Cape Town Air Access, Wesgro

Paul studied Economics and Marketing at the University of Eindhoven in the Netherlands where he graduated in 1995. In 1996 he moved for the first time to South Africa, where he worked for the South African Netherlands Chamber of Commerce (SANEC) in Johannesburg to promote the bilateral trade relations. He joined as Project Manager and was promoted to General Manager in 1998. In 2001, Paul returned to the Netherlands and started his career in the airport and aviation industry. He worked for the Schiphol Area Development Company (SADC) as International Marketing Director until 2013. He was responsible for the international marketing strategy of one of Europe's leading airport regions with its airport city and aerotropolis model and assisted in improving Amsterdam's air network for both passengers as well as cargo. In late 2013, Paul moved to Cape Town to work for the Dutch Ministry of Economic Affairs. Since 2015 he is also Project Manager of Cape Town Air Access.

Corne Koch, Head of the Cape Town & Western Cape Convention Bureau, Wesgro

Passionate promotor of South Africa and contributor to economic growth, Corne commenced her formal career at the South African Chamber of Commerce as Manager Corporate Affairs. She then entered the destination marketing sector in 2003 as the Gauteng Tourism Authority's Business Tourism Manager. Perusing her other passion, that of communicator, she took the role of Communications Manager at the Advertising Standards Authority of South Africa before her desire for tourism marketing enticed her back to Gauteng Tourism Authority in 2010 for another three year stint as Trade Development and Partnership Manager. In 2014 she moved to Cape Town and joined Wesgro in her current role as Head of the Cape Town and Western Cape Convention Bureau.



Rick Taylor, International Tourism Consultant, The Business Tourism Company

Rick Taylor's credentials cover the management, marketing and growth of big brands and destinations throughout a 20-year advertising career followed by 20 years in tourism, dealing at the highest levels of international, national, provincial and local government and commerce. He has a demonstrable track record in providing innovative and marketing led strategic solutions, combined with strong business development, communications, leadership and team building skills. After owning his own hotel, he served as Chief Executive Officer of Cape Metropolitan Tourism and the Cape Town Convention Bureau for seven years and later as Head of the National Convention Bureau for South African Tourism. Rick has been CEO of The Business Tourism Company since 2005 with assignments in Southern Africa, West Africa, East Africa, Europe, Australia and Trinidad & Tobago. Rick has sat on a number of National and International Boards in the tourism arena, including Tourism Business Council of South Africa (TBCSA); South African Meetings Industry Federation (SAMIF); Destination Marketing Association International (USA); Marketing Federation of South Africa (MFSA) and the International Advisory Committee of the French Tourism Board (Maison de la France).

Jean-Marc Bourreau, IOS Partners

Jean-Marc Bourreau has nearly 20 years of professional experience in aviation strategic planning and operations as well as airport development and transaction advisories. Since 2011, he is the Chief Operating Officer of IOS Partners, Inc., a premier consulting company specializing in Aviation and Economic Development. He has led aviation projects in over 70 countries, including over 15 countries in Africa. He worked at the Juan Santamaría International Airport (San José, Costa Rica), from 2001 to 2008; first as a Quality and Environment Manager, and then as the Director of the Airport. During this period, the airport underwent a major construction program, was fully certified ISO 9001 and implemented a highly successful Air Service Development Program. Contact: jboureau@iospartners.com

Gavin Scott, Assistant General Manager, Cape Town International Airport

Bio currently unavailable



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