In Their Words

Closing the 90% NDC Gap: What the number tells us

Abderahmane Berthe,

Secretary General, AFRAA featured in ***TRAVEL DISTRIBUTION NEWS***

Q1. The AFRAA–TPConnects whitepaper published earlier this year put a striking number on the table: more than 90% of AFRAA member airlines currently have no NDC capability. From your position as Secretary General, what does that figure actually tell us about the structural realities facing African carriers, and what does it not tell us?

That figure is significant, but it requires careful interpretation. What it tells us unambiguously is that the overwhelming majority of African carriers are still transacting through legacy GDS infrastructure that was not designed with their operating context in mind. It tells us that the shift to modern retailing has not yet reached our membership in any meaningful way, and that for most African airlines, NDC remains a distant ambition rather than an operational reality.

But what the figure does not tell us is how alive African carriers are to modernization. This fact is corroborated by the same survey which found that over 40% of airlines are either planning or actively implementing NDC. There is an appetite. The constraint is not vision — it is capacity. Most AFRAA member airlines are small to mid-sized operators: 81% carry fewer than two million passengers annually, and 80% operate fleets of 15 aircraft or fewer. These are not organizations with large IT departments or transformation budgets. The 90% figure reflects the consequences of under-resourced aviation ecosystems, not a lack of strategic will.

What the number also does not capture is the diversity within it. Some of our members are well along the path; others are operating with on-premises infrastructure and no near-term cloud migration timeline. A single headline statistic flattens that complexity. Our work at AFRAA is to address the spectrum, not just the average.

Q2. African airlines operate in a fundamentally different commercial environment to the carriers that have led NDC adop-

« Ce n'est pas la vision qui manque, c'est la capacité »

Abderahmane Berthe, Secrétaire général de l'AFRAA, revient sur le chiffre marquant du livre blanc AFRAA–TPConnects : plus de 90 % des compagnies membres n'ont aujourd'hui aucune capacité NDC.

Un constat qu'il invite à interpréter avec nuance.

Un retard qui n'est pas un manque de volonté. Pour Abderahmane Berthe, ce chiffre traduit surtout la réalité d'écosystèmes aéronautiques sous-dotés en ressources, et non une absence d'ambition. La même enquête montre que plus de 40 % des compagnies planifient ou déploient

tion globally. Legacy GDS dependency, thin margins, limited IT budgets, and fragmented market structures all play a role. In your view, which of these barriers is the most consequential, and which is the most misunderstood by the vendors and organizations pushing NDC adoption on the continent?

The most consequential barrier, in my view, is the absence of in-house technical capacity. You can address cost through financing mechanisms, you can address market fragmentation through interline and codeshare arrangements, but the deficit of skilled digital talent within African airlines is a structural problem that takes years to resolve. The whitepaper confirmed this: 60% of respondents reported difficulties integrating NDC with existing systems, and many airlines openly acknowledged they lack the in-house expertise to manage large-scale IT transformation. Without that internal capability, even well-designed solutions will not be implemented well.

The most misunderstood barrier, in my experience, is agency and market readiness. Vendors arrive on the continent with technically sound products and assume that once the airline is equipped, distribution will follow. What they consistently underestimate is that the travel agent community in many African markets remains deeply embedded in GDS workflows. The incentive structures, the booking tools, the settlement mechanisms, all of it is built around existing intermediary channels. Any NDC adoption strategy that does not invest in agent training and transition support is building on an incomplete foundation.

I would also add that the framing of 'barriers' can obscure a more important point: African airlines are not simply behind on a universal adoption curve. They are navigating a distinct commercial environment that demands adapted solutions, adapted timelines, and adapted support models. The industry's credibility with African carriers depends on acknowledging that.

déjà le NDC. « La contrainte n'est pas la vision — c'est la capacité. » La plupart des membres de l'AFRAA sont de petits opérateurs : 81 % transportent moins de deux millions de passagers par an et 80 % exploitent 15 avions ou moins, sans grands départements informatiques ni budgets de transformation.

Les vrais obstacles. Le plus déterminant, selon lui, est le déficit de compétences techniques internes : 60 % des compagnies interrogées peinent à intégrer le NDC à leurs systèmes existants. Le plus mal compris est la maturité des agences : les fournisseurs supposent qu'une fois la compagnie équipée, la distribution suivra, en sous-estimant à quel point les agents africains restent ancrés dans les flux GDS. Toute stratégie qui néglige leur formation « repose sur une fondation incomplète ».

Une norme à adapter. Conçue pour de grands transporteurs à service complet dotés d'infrastructures PSS sophistiquées, la norme NDC ne sert pas, en l'état, la majorité des compagnies africaines. Abderahmane Berthe ne plaide pas pour son abandon mais pour son adaptation véritable : parcours modulaires et progressifs, solutions cloud-native sans intégration lourde sur site, et modèles commerciaux calibrés sur la base de revenus des petits opérateurs.

Une distribution qui freine la connectivité intra-africaine. Le Secrétaire général dénonce des schémas tarifaires inadaptés : les frais GDS d'une réservation Nairobi-Mombasa sont comparables à ceux d'un Nairobi-Londres, alors que le tarif est bien moin-

Q3. AFRAA has consistently advocated for African carriers on issues of infrastructure, regulation, and market access. What specific role should AFRAA be playing in the NDC transition, and what would meaningful industry-level support for African airlines actually look like in practice?

AFRAA's role in the NDC transition is threefold: policy, knowledge-sharing, and partnership facilitation. Let me take each in turn.

On policy, AFRAA position is that the policy and standards environment evolve in ways that do not inadvertently disadvantage smaller carriers. Our recommendation on how NDC standards are developed and maintained is that the African operating context is represented in those conversations. Standards should not be designed exclusively around the realities of large full-service carriers in mature markets and then handed down to the rest of the world.

On knowledge-sharing, AFRAA is well-positioned to act as a convener, bringing together member airlines to share experiences, surface common challenges, and identify what has

and has not worked. The collaboration with TPConnects that produced our joint whitepaper is one model of this. We intend to do more. Our platforms, including AFRAA workshops and masterclasses with our partners and events such as the AFRAA Aviation Stakeholders Convention, provide opportunities for exactly this kind of structured exchange.
In partnership facilitation, we can help airlines access solutions they could not pursue individually.

This means negotiating frameworks, identifying credible technology partners, and ensuring that vendors serving our membership deliver genuine value rather than simply extracting from airlines that lack the negotiating leverage of larger global carriers.

What meaningful support does not look like is generic capacity-building programmes that are not calibrated to specific airline contexts. African airlines do not need more seminars. They need technical assistance that is embedded, practical, and measurable.

Q4. There is a growing argument that the NDC standard, as currently designed and implemented, was built around the operational realities of large full-service carriers in mature markets. Do you believe the standard as it stands serves African airlines, or does it need to evolve to reflect the distribution realities of smaller, regional, and LCC operators across the continent?

This is one of the most important questions in our industry right now. The NDC standard, as currently designed, does not adequately serve the majority of African airlines. It was conceived in an environment where airlines have sophisticated PSS infrastructure, mature IT departments, and established relationships with technology integrators. Most of our member airlines have none of those in the same form or at the same scale.

The standard is technically sound in its aims, including direct distribution, richer content, dynamic pricing, and offer and order management. The ambition is right. But the implementation pathway assumes a level of technical maturity and financial headroom that simply does not exist across much of the African airline sector. For a carrier operating six to fifteen aircraft with on-premises systems, which describes a significant portion of our membership, the path to NDC compliance is not a straightforward technology project. It is a wholesale transformation of commercial infrastructure.
What I would advocate for is not the abandonment of the standard, but its genuine adaptation. That means modular, phased implementation pathways for smaller carriers. It means cloud-native solutions that do not require expensive on-premises integration. It means commercial models from technology partners calibrated to the revenue base of smaller operators, not priced on the assumption of large-carrier volumes.

Q5. Intra-African connectivity remains one of the most persistent structural problems in African aviation. How does the current state of airline distribution technology either help or hinder progress on that challenge, and what would a distribu-

dre. Trop souvent, les trajets entre deux villes africaines sont tarifés via des hubs européens ou moyen-orientaux, et les accords d'interligne entre transporteurs africains restent difficiles à faire apparaître. Une infrastructure véritablement pensée pour l'Afrique devrait rendre ces partenariats visibles et réservables, refléter les réalités de paiement locales (dont le mobile money) et rester accessible aux petites agences. C'est l'ambition de l'initiative AFRAA Xchange.

Le rôle de l'AFRAA. Il se décline en trois axes — politique, partage de connaissances et facilitation de partenariats — pour que le contexte africain soit représenté dans l'élaboration des normes et que les compagnies accèdent à des solutions négociées collectivement. « Les compagnies africaines n'ont pas besoin de davantage de séminaires. Elles ont besoin d'une assistance technique intégrée, concrète et mesurable. »

Des perspectives prudemment optimistes. 18 % des compagnies prévoient d'achever leur transition NDC en un an, 28 % de plus d'ici deux à trois ans. Pour que le chiffre de 90 % évolue, trois conditions : une technologie plus accessible, un canal agences activé et des financements adaptés. « La fenêtre d'action est ouverte. Les transporteurs qui agissent maintenant seront mieux placés pour capter la croissance selon leurs propres termes. »

tion infrastructure genuinely built for intra-African travel look like?

Growth in Intra-African connectivity demands patience and disciplined route development. This effort is not cheap and requires cost discipline. Current distribution charging schemes completely disregard this fact. The GDS charges for a Nairobi-Mombasa booking are similar to a Nairobi-London booking even if the fare on the shorter trip is a small fraction of the longer flight. This makes the task of growing intra-African connectivity difficult. Therefore, while I cannot say the current state of airline distribution is the only cause for this structural problem, I can assert that it is not positively contributing.

The current state of airline distribution technology actively hinders intra-African connectivity, and this is not discussed nearly enough. When an African traveler tries to book a journey between two African cities, particularly across regions, they often encounter fares that are priced through European or Middle Eastern hubs, because that is how the GDS infrastructure has historically routed and priced African itineraries. The technology is not neutral; it encodes a particular model of how African air travel is organised, and that model does not serve African travelers or African airlines.

Fragmented distribution also means that interline and codeshare arrangements between African carriers, which are essential to building genuine intra-African networks, are difficult to surface through existing booking channels. An agent or traveller searching for an itinerary across two African carriers may simply not find it, or find it priced un-competitively, because the distribution infrastructure is not built to present those options clearly.

A distribution infrastructure genuinely built for intra-African travel would require several key features. First, it would need to support the commercial relationships between African carriers: interlining, code-sharing, and eventually more sophisticated partnership models and make those relationships visible and bookable in a straightforward way. Second, it would need to reflect the payment realities of African markets, including the prevalence of mobile payments, the limited penetration of cards, and the role of local payment systems. Third, it would need to be accessible to the travel trade across the continent, including smaller agencies in markets with thin GDS coverage. This is the ambition of the AFRAA Xchange initiative, which seeks to close all these gaps.

Q**6. Looking at the next three to five years, what is your realistic outlook for NDC adoption among AFRAA member airlines? What conditions would need to be in place for that 90% figure to shift meaningfully, and which stakeholders bear the most responsibility for creating those conditions?**

My realistic outlook is cautiously optimistic, but with clear eyes about the pace of change. The survey data tells us that 18% of carriers plan to complete their NDC transition within a year, and a further 28% within two to three years. If those intentions translate into action, we would see a material shift in the landscape within the timeframe you describe. But airline transformation programmes are complex, and intentions do not always survive the rigors of budget cycles and operational pressures.
The conditions that would need to be in place for the 90% figure to shift meaningfully are, in my view, the following. First, technology must become more accessible, both technically and commercially. Cloud-based, modular NDC solutions that can be deployed without extensive PSS integration work, priced at a point accessible to smaller carriers, would change the calculation for a significant number of our members. Second, the travel agency channel must be activated. As long as the majority of airline revenue in many African markets flows through agents who are not yet NDC-capable, airlines face a transition risk that deters investment. Agent training, incentive realignment, and B2B portal solutions that make NDC content accessible to agents are essential.

Third, financing and technical assistance must be available on terms that reflect the realities of African airlines. The development finance institutions and multilateral bodies that invest in African aviation infrastructure can consider extending their attention to digital commercial infrastructure, not only to physical infrastructure.

As for responsibility, it is distributed, but not equally. Technology vendors bear responsibility for designing and pricing solutions that serve smaller carriers, not just the global tier-one accounts. Governments and regulators bear responsibility for creating environments in which airlines can invest. And AFRAA bears responsibility for convening, advocating, and facilitating. This is precisely what we intend to continue to do.

The window for action is open. African aviation is growing, and the carriers that move now to modernize their distribution will be better positioned to capture that growth on their own terms. That is the message we are carrying to our membership, and we are assisting this process through the AFRAA Xchange project.