

INTERNATIONAL CIVIL AVIATION ORGANIZATION



REPORT

**PREPARATORY VIRTUAL MEETING FOR AFI STATES
SEVENTH WORLDWIDE AIR TRANSPORT CONFERENCE (ATCONF/7)
TUESDAY, 19 MAY 2026- 12:00 – 14:00 UTC**

Prepared by ICAO ESAF and WACAF Regional Offices

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1. CONTEXT AND PURPOSE

1.1 The Preparatory Virtual Meeting for Africa-Indian Ocean (AFI) States on the Seventh Worldwide Air Transport Conference (ATConf/7) was convened on 19 May 2026 by the ICAO Eastern and Southern Africa (ESAF) and Western and Central Africa (WACAF) Regional Offices. The meeting was held via Zoom and brought together representatives of AFI Member States, Regional Economic Communities (RECs), the African Civil Aviation Commission (AFCAC), and key aviation industry partners.

1.2 ATConf/7 will convene at ICAO Headquarters in Montréal from 16 to 20 November 2026 under the theme: "Air Transport: Powering Global Connectivity, Economic Development and Resilience in a Dynamic World." It is the first worldwide air transport conference since ATConf/6 in 2013 and will set the global aviation policy direction for the next decade.

1.3 The meeting was convened with four objectives:

- a) To brief AFI States and stakeholders comprehensively on ATConf/7 — its agenda, objectives, format, and preparatory requirements;
- b) To understand and document the perspectives, priorities, and challenges of AFI States and industry partners;
- c) To develop and consolidate AFI priorities to be carried into ATConf/7 working papers; and
- d) To agree on a coordination roadmap from the meeting through to the conference in Montreal.

2. OPENING OF THE MEETING

Opening by the Chair

1.1. Mr. Silas Udahemuka formally opened the session, welcoming participants from across the AFI region and noting that the meeting had been convened to ensure Africa's voice would be clearly articulated at ATConf/7. The Chair introduced Co-Chair Ms. Toska Sem and outlined the structure of the meeting before inviting the ICAO ESAF Regional Director to deliver the official opening remarks.

Opening Remarks – ICAO ESAF Regional Director

1.2. Ms. Lucy Mbugua, ICAO ESAF Regional Director, formally opened the meeting on behalf of both the ESAF and WACAF Regional Offices, underscoring the significance of ATConf/7 as a once-in-a-generation policy opportunity. As the first conference of its kind in over a decade, she noted that it will shape the economic and regulatory foundations of global civil aviation for the next decade. She stressed the importance of early and coordinated engagement by the AFI region, highlighting that working papers submitted by Member States are instrumental in influencing both the deliberations and outcomes of the conference. In this context, she also drew attention to Africa’s structural aviation realities, observing that out of 55 African Union Member States, 33 are Least Developed Countries, 16 are Landlocked Developing Countries, and 6 are Small Island Developing States—countries for which aviation is not a luxury, but a vital driver of socio-economic development.

1.3. She further reiterated the Secretary General’s call to treat full market access liberalization as a foundational premise rather than a subject for debate, encouraging a forward-looking and unified approach. In closing, Ms. Mbugua called on all States to designate a focal point for ATConf/7 and to actively collaborate with AFCAC in developing coordinated working papers. She also urged Member States to plan for ministerial-level representation at the conference in Montréal, where a Ministerial Declaration is expected to be adopted on the final day, reinforcing collective commitments and guiding the future direction of international air transport policy.

Key Message – ICAO Secretary General

1.4. The ICAO Secretary General, Mr. Juan Carlos Salazar, joined the meeting and underscored the strategic importance of ATConf/7 as a pivotal global event, noting that it comes at a critical moment when Africa is expected to be the fastest-growing aviation region worldwide. He highlighted that the conference, taking place more than a decade after the previous one, offers a unique opportunity to advance the growth and development of international civil aviation, particularly for regions with significant untapped potential such as Africa.

1.5. He reaffirmed ICAO’s commitment to working closely with African States and stakeholders, emphasizing the importance of continued engagement, idea-sharing, and coordinated input to enrich the conference outcomes. He encouraged participants to maintain momentum and contribute actively to shaping proposals that will support economic development and strengthen the global air transport system, expressing confidence that ATConf/7 will play a decisive role in defining the future trajectory of the sector.

3. CONTINENTAL POLICY PERSPECTIVE — AFCAC

3.1 The Secretary General of AFCAC, Ms. Adefunke Adeyemi, presented the continental policy perspective, underscoring the importance of articulating a strong and unified African position at ATConf/7. She emphasized that this position should be firmly anchored in the Single African Air Transport Market (SAATM) and aligned with the broader objectives of the African Union’s Agenda 2063. In her remarks, she highlighted the need for a clear and strategic understanding of what Africa expects to achieve from the conference, stressing that the continent must speak with one voice to effectively influence global air transport policy outcomes.

3.2 Ms. Adeyemi outlined AFCAC’s key priorities for ATConf/7, including the full and accelerated implementation of SAATM as Africa’s primary vehicle for market liberalisation, as well as efforts to enhance connectivity, affordability, and accessibility of air transport—particularly for Least Developed Countries, Landlocked Developing Countries, and Small Island Developing States. She also called for the reduction of taxes, charges, and other cost barriers affecting African airline competitiveness, alongside the mobilisation of investment in aviation infrastructure through innovative financing mechanisms and partnerships with development banks. Further priorities included advancing facilitation measures such as visa liberalisation to boost travel demand and support the African Continental Free Trade Area, and shifting from policy declarations to tangible, measurable outcomes with structured support from ICAO and AFCAC. She concluded by reaffirming AFCAC’s readiness to coordinate Africa’s working paper submissions ahead of the 25 September 2026 ICAO deadline and urged Member States to engage without delay.

4. OVERVIEW OF ATCONF/7 — ICAO AIR TRANSPORT BUREAU

4.1 Mr. Mohammed Rahma, Director of the ICAO Air Transport Bureau (ATB), presented a comprehensive overview of ATConf/7 under Agenda Item 2, highlighting its scope, structure, and participation. He informed participants that the conference will take place from 16 to 20 November 2026 at ICAO Headquarters in Montréal, Canada, under the theme “Air Transport: Powering Global Connectivity, Economic Development and Resilience in a Dynamic World.” The event will conclude with the adoption of a Ministerial Declaration on its final day. He also noted that the conference will feature broadened participation, including financial institutions, infrastructure developers, technology stakeholders, and ministerial-level delegations, reflecting a more inclusive and multi-sectoral approach to shaping the future of air transport.

4.2 Mr. Rahma further outlined the six key objectives of ATConf/7, which include advancing economic regulatory frameworks, strengthening industry resilience, mobilising blended financing for aviation infrastructure, supporting innovation and emerging technologies, enhancing institutional and human capacity, and promoting sustainable and inclusive growth. In addition, he presented the preparatory timeline, highlighting important milestones such as the publication of ICAO Secretariat working papers by 1 August 2026, submission deadlines of 25 September 2026 for States and regional organisations and mid-October for information papers, as well as the 20 October 2026 deadline for registration and credentials. These milestones lead up to the conference itself, with a potential pre-conference investment event planned for 15 November 2026.

5. AFI STATES' PERSPECTIVE — CO-CHAIR, MS. TOSKA SEM

5.1 Ms. Toska Sem, Executive Director of the Namibia Civil Aviation Authority (NCAA), presented the AFI States' perspective under Agenda Item 3.1 on behalf of Member States. Her presentation offered a comprehensive, evidence-based assessment of Africa's aviation landscape and highlighted the region's strategic priorities for ATConf/7. She emphasized Africa's demographic and economic weight relative to its aviation footprint, noting that the continent comprises one of the largest groupings within ICAO with African Union Member States—a population exceeding 1.5 billion and the fastest-growing aviation market globally, projected to grow at a compound annual rate of 4.8%.

5.2 Despite this strong potential, Ms. Sem underscored significant structural challenges. She pointed out that 33 African States are classified as Least Developed Countries, 16 as Landlocked Developing Countries, and 6 as Small Island Developing States—many of which depend heavily on aviation as their primary gateway to global trade and development. She further highlighted the continent's limited intra-African connectivity, with seat capacity standing at less than 21%, well below the global intra-regional average of over 60%. In addition, Africa accounts for only 1.7% of global air cargo traffic despite representing approximately 4% of global trade value. She also noted the substantial infrastructure gap, estimating that USD 220 billion will be required by 2040, with less than a quarter of this currently accessible through private financing.

5.3 Building on these realities, Ms. Sem outlined six strategic priorities for ATConf/7. These include accelerating the full liberalisation of African air transport through the Single African Air Transport Market (SAATM), supported by global endorsement, ICAO technical assistance, and an AFCAC-led accountability framework with clear timelines. She also stressed the need to mobilise blended financing for aviation infrastructure by leveraging partnerships with multilateral

development banks, public-private partnerships, and de-risking instruments tailored for African projects.

5.4 She further emphasized the importance of establishing a robust technical assistance and capacity-building programme, including a funded Next Generation of Aviation Professionals initiative, support for regional training institutions, and mutual recognition of licences across AFI States. In addition, she called for the development of equitable frameworks for sustainable aviation fuel (SAF) and clean energy transitions that reflect the specific needs of developing countries.

5.5 Finally, Ms. Sem highlighted the need to ensure inclusive governance of emerging technologies, including harmonised regulatory frameworks for unmanned aircraft systems (UAS) and early African participation in advanced air mobility (AAM) policy development. She also underscored the importance of strengthening consumer protection and resilience frameworks, including context-specific emergency preparedness standards for African civil aviation authorities and the establishment of baseline consumer protection measures applicable across all African carriers and routes.

6. INDUSTRY PERSPECTIVES

Airlines – African Airlines Association (AFRAA)

6.1 The AFRAA representative highlighted a major paradox in Africa’s aviation sector: despite being the fastest-growing passenger market globally, African airlines face significantly lower profitability, earning about USD 1.30 per passenger compared to the global average of USD 7.90. This is largely due to structural challenges such as high fuel costs, excessive taxes and charges, and expensive air navigation fees, which together create a cost burden exceeding 40% compared to global competitors. Limited route connectivity further compounds these challenges, leading to fragmented markets and weak financial performance.

6.2 To address these issues, AFRAA emphasized the need for regulatory reforms to reduce costs, improved compliance with the Cape Town Convention to enhance financing conditions, and the advancement of key initiatives such as the Integrated Aviation Transformation Programme. It also stressed the importance of developing regional maintenance capabilities and expanding access to modern aircraft through blended financing mechanisms to improve efficiency and competitiveness.

Air Navigation Services – CANSO Africa

6.3 The CANSO Africa representative presented the air navigation service provider perspective under Agenda Item 3.2b, emphasizing that air traffic management (ATM) and airspace management should be treated as strategic infrastructure—similar to roads and energy systems—requiring sustained and predictable investment rather than solely operational focus. The presentation highlighted key challenges facing the region, including fragmented ATM implementation, limited funding and investment, infrastructure and digitalisation gaps, workforce and skills shortages, and weak coordination among stakeholders.

6.4 To address these constraints, CANSO Africa outlined three strategic priorities: strengthening a digital and interoperable ATM backbone, advancing regional integration and harmonisation in line with ICAO frameworks, and investing in human capital and institutional capacity. The presentation underscored that Africa has a unique opportunity to bypass legacy systems and transition directly to modern, digitally enabled, and performance-based ATM environments, provided that ATConf/7 supports the necessary policy direction and investment framework.

Airports – ACI Africa

6.5 The ACI Africa representative presented the airport operator perspective under Agenda Item 3.2c, emphasising the central message that sustainable air connectivity cannot be achieved without sustainable airports. The presentation highlighted key challenges facing African airports, including limited access to capital, high regulatory pressure, and unstable revenue streams. It was also noted that more than 35 major airports across the continent are currently operating beyond their design capacity, underscoring the urgency of addressing infrastructure constraints to support growing demand.

6.6 ACI Africa outlined key priorities for ATConf/7, including integrating aviation infrastructure into national development plans linked to trade, tourism, and AfCFTA value chains to create bankable projects, and advancing public–private partnership frameworks alongside policy alignment for route development. The importance of adopting consumer protection and emergency preparedness standards suited to African realities was also stressed, along with ensuring fair and equitable climate transition measures that do not disproportionately burden developing countries. Additionally, ACI Africa highlighted the planned pre-conference investment event in Montréal on 15 November 2026 as a key forum to mobilise financing and strengthen partnerships for airport infrastructure development.

7. OPEN DISCUSSION — AGENDA ITEM 4

The Chair opened the floor for open discussion and questions following all presentations. A number of contributions were made to the discussion. The following key themes emerged:

A. Action Over Declaration

7.1 Participants expressed a repeated and urgent concern about the gap between policy commitments and implementation across African aviation. There was strong consensus that ATConf/7 must produce not aspirational language but binding, measurable and implementable commitments — with monitoring mechanisms and accountability frameworks.

B. Leadership and Governance

7.2 Participants called for stronger and more intentional leadership at all levels — from national governments and CAAs to continental bodies. The "invisible barriers" to aviation development — including weak institutional execution, regulatory fragmentation, and insufficient political prioritisation — were specifically identified as requiring direct attention in ATConf/7 outcomes.

C. Inclusion of LDCs, LLDCs and SIDS

7.3 Strong emphasis was placed on ensuring that ATConf/7 outcomes to specifically address the needs of landlocked countries and small island States, for whom aviation is essential infrastructure with no viable substitute.

D. Affordability and Market Access

7.4 Participants highlighted the critically low rate of air travel penetration across Africa — driven by high fares resulting from taxes, charges, fuel costs, and fragmented markets. Multiple interventions reinforced the argument that liberalisation, without parallel action on costs and infrastructure, would produce limited results for African travellers and economies.

E. Systemic Barriers

7.5 The discussion surfaced a cluster of mutually reinforcing systemic barriers: high taxes and visa restrictions limiting demand; weak coordination between States on bilateral air services agreements; limited access to affordable aviation financing; and poor intra-African connectivity resulting from incomplete SAATM implementation. Participants agreed that ATConf/7 must serve as a forum to address these barriers as a coherent package, not in isolation.

8. SUMMARY OF OUTCOMES AND AGREED NEXT STEPS — AGENDA ITEM 5

The Chair, Mr. Silas Udahemuka, drew together the outcomes of the meeting, noting broad convergence across all presentations and the open discussion around four core themes: connectivity, financing, capacity, and an equitable policy framework.

Endorsed Priorities

8.1 The following positions were endorsed by participants as Africa's consolidated platform for ATConf/7:

- a) The Single African Air Transport Market (SAATM) as Africa's primary implementation vehicle — with outcome language on development-compatible liberalisation and affordability in ATConf/7 conclusions;
- b) Blended financing for aviation infrastructure — ICAO to facilitate mobilisation through bankable project pipelines, MDB partnerships, PPP frameworks, and de-risking instruments for African aviation projects;
- c) Regulatory and institutional strengthening — strengthening Cape Town Convention (CTC) compliance; enabling credible, fair, and capable regulatory bodies across AFI States;
- d) Interoperable and digitally enabled ATM — commit to sustained investment in ATM modernisation; support for Africa's advancing opportunity; implementation of ICAO's GANP and MIP across the AFI region;
- e) Workforce and institutional capacity — NGAP at scale for Africa; ATC training; regulatory economics capability; and data-driven oversight;
- f) Equitable innovation and sustainability — inclusive policy design for UAS, AAM, and SAF while considering the specific circumstances of developing States. It also calls for transparent data-sharing and a fair, phased transition to clean energy that avoids placing undue burdens on countries with limited resources.
- g) Consumer protection and resilience — baseline standards applicable to all African carriers and routes; emergency preparedness adapted to African CAA capacity; and

- h) Invisible Connectivity Barriers — Advance a coordinated advocacy agenda for the elimination of visa restrictions, strengthening of industry leadership and rationalization of taxes and charges across the AFI region; and
- i) AFCAC coordination mandate — structured support in coordination with ICAO regional offices for regional priorities and working papers for AFI/Africa States to be presented at ATConf/7.

Agreed Next Steps

8.2 The following five next steps were agreed by participants and confirmed by the Chair:

- a) **Nomination of focal points (by 15 June 2026):** All AFI Member States to designate and communicate an ATConf/7 focal point to AFCAC and inform ICAO ESAF/WACAF Offices.
- b) **Continental endorsement in Lome (15–19 June 2026):** AFCAC, together with ICAO ESAF and WACAF, to present and secure endorsement of a consolidated AFI priorities at the African Air Transport Convention and Expo, leading to the Lomé Declaration.
- c) **Working paper development (by 25 September 2026):** AFCAC to lead a multi-State drafting group for coordinated, co-sponsored working papers aligned with agreed African priorities, submitted within ICAO deadlines.
- d) **Ministerial engagement and coordination (October 2026):** States to brief relevant Ministers (Transport, Finance, Trade, Environment), while AFCAC convenes a final coordination meeting to confirm strategies.
- e) **Participation at ATConf/7 (16–20 November 2026):** AFI States, supported by AFCAC and ICAO, to engage cohesively at the conference, aiming for strong outcomes reflected in decisions and the Ministerial Declaration, with measurable impacts on connectivity, costs, and investment.

9. CLOSING REMARKS

Closing Remarks by the Co-Chair

9.1 Ms. Toska Sem reinforced the urgency of immediate action on working paper preparation, noting that the ICAO deadline of 25 September 2026 is four months from the meeting date. She called on all States to nominate their focal points promptly and to engage with AFCAC's coordination mechanism without delay, underlining that co-sponsored, coordinated papers carry significantly greater weight than individual State submissions.

Vote of Thanks by the Chair

9.2 The Chair expressed his sincere gratitude to the ICAO ESAF and WACAF Regional Offices, the AFCAC Secretary General, the ICAO ATB Director, AFRAA, CANSO Africa, ACI Africa, and all Member States and stakeholders who contributed to the meeting, describing the session as a demonstration of what coordinated African aviation engagement can achieve. He also thanked the ICAO secretary General for his presence in the meeting and encouragement that he provided.

Closing Remarks — ICAO WACAF Regional Director

9.3 Mr. Romain Ekoto, Regional Director of the ICAO Western and Central Africa (WACAF) Regional Office, formally closed the meeting on behalf of ICAO. In his remarks, he reflected on the achievements of the session, highlighting the strong convergence between States and industry around shared priorities and a common platform for engagement. He reaffirmed ICAO's commitment, through both the ESAF and WACAF Regional Offices, to support AFI States through technical assistance, close coordination with AFCAC, and ensuring that Africa's voice and priorities are clearly represented at ATConf/7.

9.4 Mr. Ekoto further underscored that ATConf/7 represents a once-in-a-generation opportunity for the AFI region to actively shape the future of global air transport rather than remain a passive observer. He concluded by pointing to upcoming milestones, including the African Air Transport Convention and Expo in Lomé and the AFI Aviation week in Cairo in June and July 2026 respectively, as key opportunities to sustain momentum and advance Africa's collective aviation agenda towards ATConf/7 in Montreal in November 2026.

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