



**AFRICAN AVIATION
TRANSFORMED**

Session 6: Tools for Air Transport Liberalization

*The Third Edition of the ICAO
International Air Law Treaty
Workshop (IAL-TW/3)*



*Dar es Salaam, Tanzania,
25–27 February 2026*

20 February 2026





Shaping the Future of African Air Transport

*What tools make liberalization
legally effective in practice?*

YD Background



Adoption in 1999 / Endorsed by AU Assembly: 2000

Decision signed to liberalise air transport markets across Africa.
Fully binding in 2002 following the 2-year transition period.



Core Objectives

Continental commitment to liberalize air services, promote competition, improve connectivity, reduce travel costs.
Grant route rights; Multiple designation; No restrictions on capacity/frequency; Fair competition and tariff transparency.



Legal Basis (binding nature):

Article 10, Abuja Treaty.
Article 9(1)(e) AU Constitutive Act (2000).



National Operationalization

Effective implementation.
Align national laws/regulations.

YD Regulatory Framework

Governance Structure

- Declaration of Commitment
- Monitoring Body Duties
- Dispute Settlement Mechanism

Operational Framework

- Executing Agency Powers
- Competition Regulations
- Consumer Protection Regulations

Implementation Structure

- Regional Economic Communities
- Member States Authorities
- Industry Stakeholders





AFRICAN UNION FLAGSHIP PROJECTS

Agenda 2063 The Africa we Want



SAATM BACKGROUND

The Assembly of Heads of State and Government of the AU adopted Declaration (Assembly. Doc./Au/Decl.1 (XXIV)) on the creation of SAATM in 2015, and on 29th January 2018, launched the SAATM.

OBJECTIVE - Full Operationalization and acceleration of YD

01

Establishing a liberalized intra-African aviation market in relation to traffic rights, capacity, frequency, pricing, designation...

02

Creating a conducive environment for the development and provision of safe, reliable and affordable air transport services

03

Eliminating non-physical barriers that hamper the sustainable development of air transport services

04

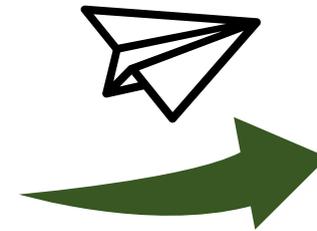
Enhancing cooperation among African airlines – Commercial and technical cooperation

05

Improving the quality of service to the consumers

06

Create one Single air transport market in Africa, liberalize civil aviation on the continent and drive economic integration



YAMOUSSOUKRO DECISION

SAATM



SAATM – Accession & Institutional Mechanism



Joining SAATM (two-step process)

- 1) Sign Solemn Commitment.
- 2) Deposit Instrument of Accession.



Engagement

The two-step process ensures both political commitment and formal accession, triggering domestic legal/regulatory obligations.



Implementation – Practical Steps

States agree to revise BASAs, open markets, designate eligible airlines, and remove restrictions on capacity/frequencies. Occur via national authorities (CAA, competition authority, consumer-protection agency).



AFCAC Support

Legal guidance, Workshops, model regulations, SAATM-PIP, peer-review missions, monitoring dashboards. Regular meetings/SAATM ministerial WG, review progress, Share best practices, address bottlenecks.



SAATM: Opening Africa's Skies

38

Member States

African Union countries representing over 80% of continental air traffic have signed the Solemn Commitment

26

Implementation States

Countries have signed the MoI, unconditionally opening their skies

113

New Routes

Intra-African routes established between 2022-2026, with 19 operating under 5th freedom rights

The SAATM liberalizes intra-African air transport, removes market barriers, and unlocks economic opportunities through seamless connectivity. 5th freedom traffic has grown from 15% in 2018 to 23% in 2024, targeting 30% by 2027.



CONNECTING

Benefits of Full SAATM Implementation

Full implementation could substantially reduce fares while increasing frequency and destinations across the continent.



Enhanced Connectivity - by over 50%

More direct routes between African cities, reducing travel time and costs for passengers and cargo by up to 26%.



Economic Growth

An estimated creation of 155,000 jobs and a contribution of \$4.6 billion to Africa's GDP through increased air services.



Trade Facilitation

Seamless movement of goods supporting the African Continental Free Trade Area objectives.



Global Competitiveness

Strengthened African carriers able to compete effectively in international markets.



Benefits Beyond Aviation

Tourism Growth

Thrives where aviation is liberalized



Trade Expansion

Flows better with open skies



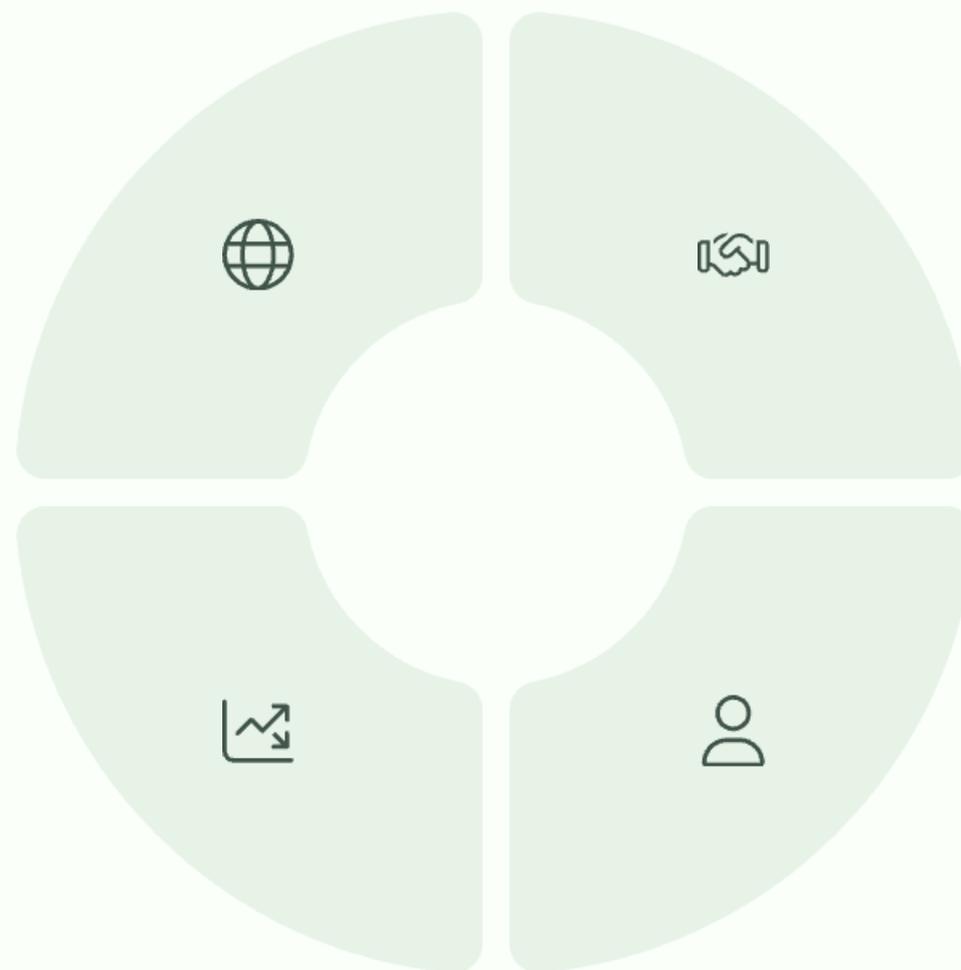
Multiplier Effect

5 indirect jobs per direct aviation job



Youth Opportunities

Find jobs where aviation grows



Challenges



Regulatory Gaps

Not all committed States have domesticated the YD/SAATM provisions into national legislation or ASAs.

Market Restrictions

Some States maintain capacity, frequency, or designation limitations that contravene the spirit of SAATM.

Infrastructure & Connectivity Gaps

Limited airport capacity, high operational costs, and weak intermodal links hamper network growth.

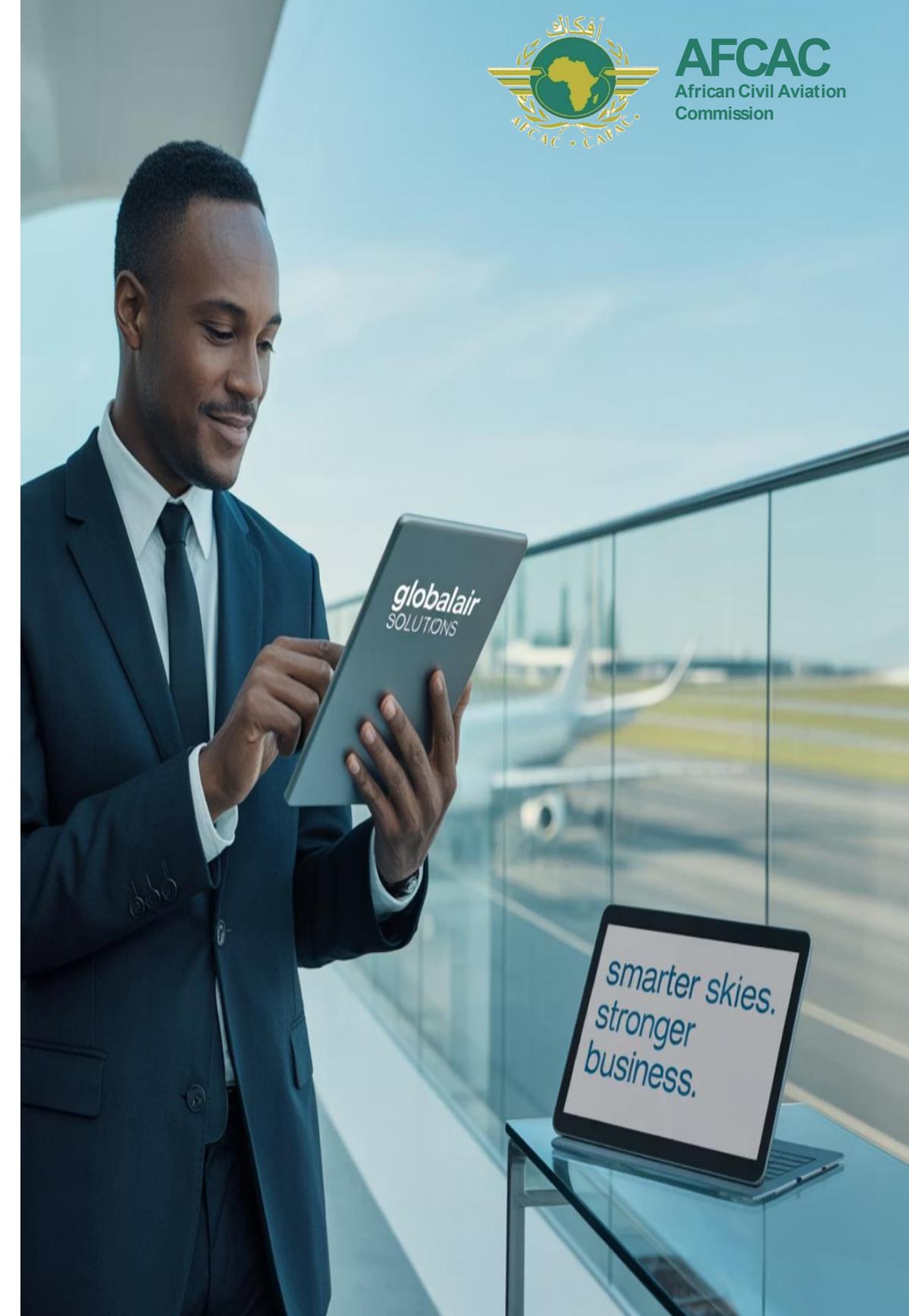
High Taxes, Fees & Charges

Inconsistent and excessive Taxes and charges continue to undermine competitiveness, contrary to ICAO policies.

Data Deficiencies

Limited availability and reliability of traffic, market, and economic data constrain evidence-based policymaking .

Key Conclusions and Way Forward



AFCAC – Strategic Priorities

To achieve our 2026 and beyond targets, AFCAC will focus on:

Full Regulatory Alignment

Intensify support for States to incorporate YD/SAATM provisions into national laws and ASAs.



Infrastructure Development

Coordinate with stakeholders to invest in route expansion, hub development, and cargo facilitation.

Market Access Compliance

Monitor and address restrictions through the DSM, ensuring fair competition and consumer protection.



Data-Driven Decision Making

Establish the African Air Transport Data Repository for market analysis and policy evaluation.

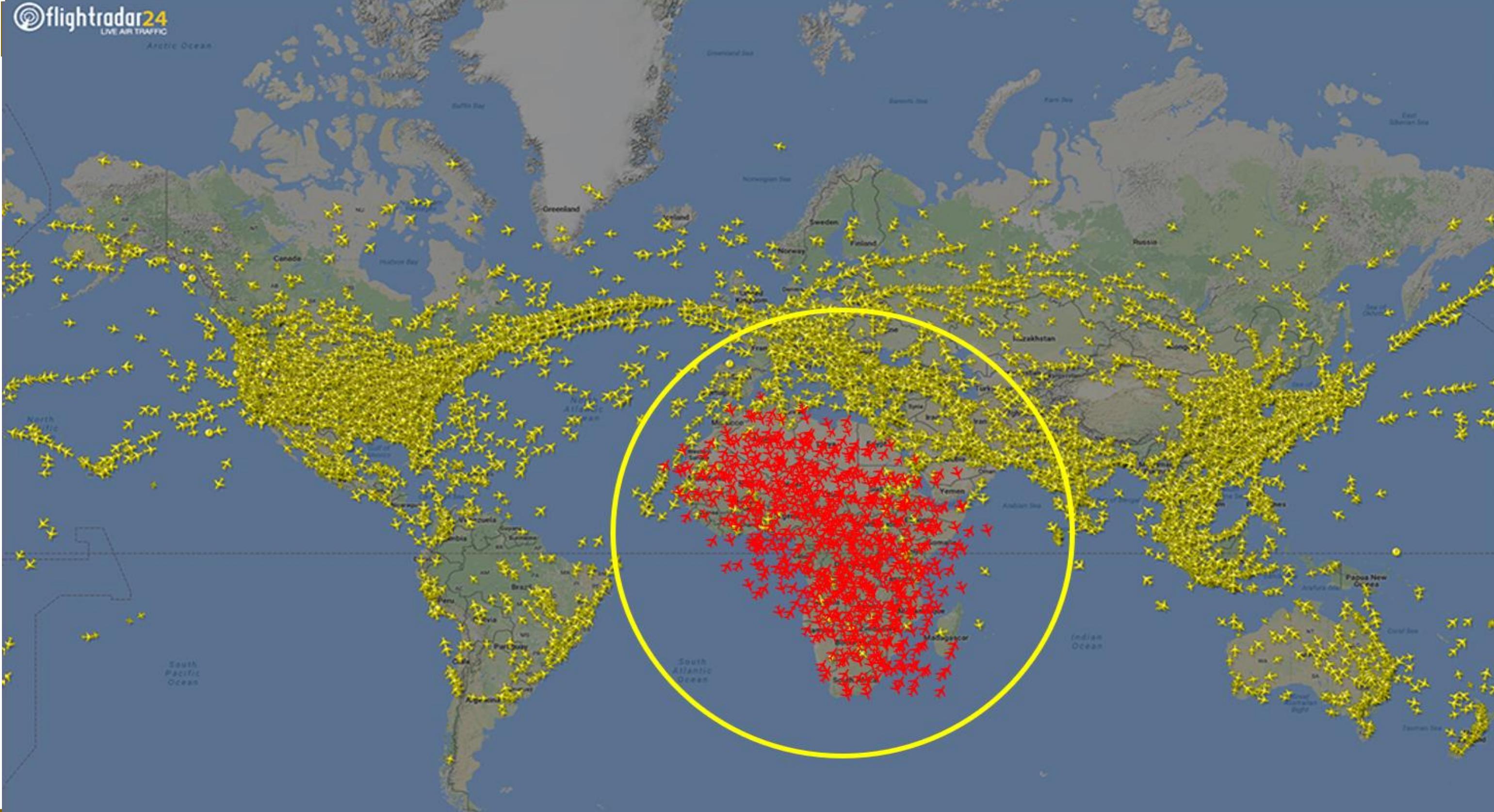
Harmonised Taxation Framework

Finalise and adopt a continental framework to reduce excessive taxes, fees, and charges.



Market Domestication

Promote the intra-RECs Domestication of Market





Thank You

Together, we can position Africa as a unified, competitive player in global aviation.

For more information, contact the African Civil Aviation Commission (AFCAC) - secretariat@afcac.org

