

**3<sup>rd</sup> Edition of the  
International Air Law  
Treaty Workshop**

**Session 6:  
Tools for air transport  
liberalisation**

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Denis K. Kimani

Aviation Counsel



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# FOUR-DECADE MARGINALIZATION TREND

## For Four Decades, No YD Implementation

- From the 1980s to 2019, the market share plummeted from 3.5% to 1.9%
- African airlines' contribution dropped from 45% to 20%
- In 2019, foreign carriers:
  - Provided air services on a third of intra-Africa via hubs outside Africa
  - Serviced 8 out of the top 10 lucrative African routes
  - Yet, eligible airlines are denied intra-Africa 5<sup>th</sup> freedom, even 3<sup>rd</sup> and 4<sup>th</sup> at times in SAATM States.

**Wake-up calls to stakeholders to seek sustainable solutions to revamp Aviation**  
**The PIP cluster initiative is great for triggering SAATM implementation in Africa.**

## MARGINALIZATION ROOT CAUSES

- Supply Chain High Costs
- High Air Transport service Fares and Rates
- Fares not affordable



**REDUCE COSTS, GAIN PRODUCTIVITY ALONG THE SUPPLY CHAIN, AND MAKE IT AFFORDABLE TO AFRICAN CITIZENS**

# Benefits of SAATM to Airlines



**Empowering Airlines for Growth**



**Competitive Advantage:** SAATM enables airlines to gain a competitive edge by offering more routes and competitive pricing.



**Operational Efficiency:** Airlines can optimize their operations by offering more direct routes and reducing the need for multiple layovers.



**Enhanced Network Growth:** Airlines can expand their route networks, connect previously underserved regions, and tap into emerging markets.



**Cost Reduction:** Airlines can achieve cost savings through improved route planning and increased aircraft utilization.

# Benefits of SAATM to Passengers

## Transforming Travel for the Better

**Increased Frequency:** SAATM encourages airlines to increase flight frequencies, giving passengers more options and flexibility in scheduling their trips.

**Reduced Layovers:** With more direct routes, passengers experience fewer layovers and shorter travel times.

**Improved Services:** Airlines are incentivized to enhance their services and onboard experiences to attract and retain passengers.

**Tourism Growth:** Enhanced connectivity encourages tourism, enabling passengers to explore a wider range of African destinations.

**Economic Impact:** As tourism and travel increase, local economies benefit from increased spending and job creation.

# Benefits of SAATM to Passengers

## Elevating the Passenger Experience

SAATM brings significant benefits to passengers, making air travel more accessible, affordable, and enjoyable.

**Greater Choice:** Passengers have access to a broader selection of airlines and destinations, enabling them to choose the best options for their travel needs.

**Competitive Pricing:** Increased competition among airlines often leads to more competitive ticket prices, making air travel more affordable.

**Enhanced Connectivity:** Passengers can enjoy more direct routes, reducing travel time and inconvenience.

# DEVELOPMENT of TRADE, AIR TRANSPORT, and TOURISM Sectors in a VIRTUOUS CYCLE

## Trading affordable consumable products

- Increases connectivity requirements and
- Supports air transport

## Providing affordable airfares

- Blossoms air traffic demand and
- Supports trade and tourism

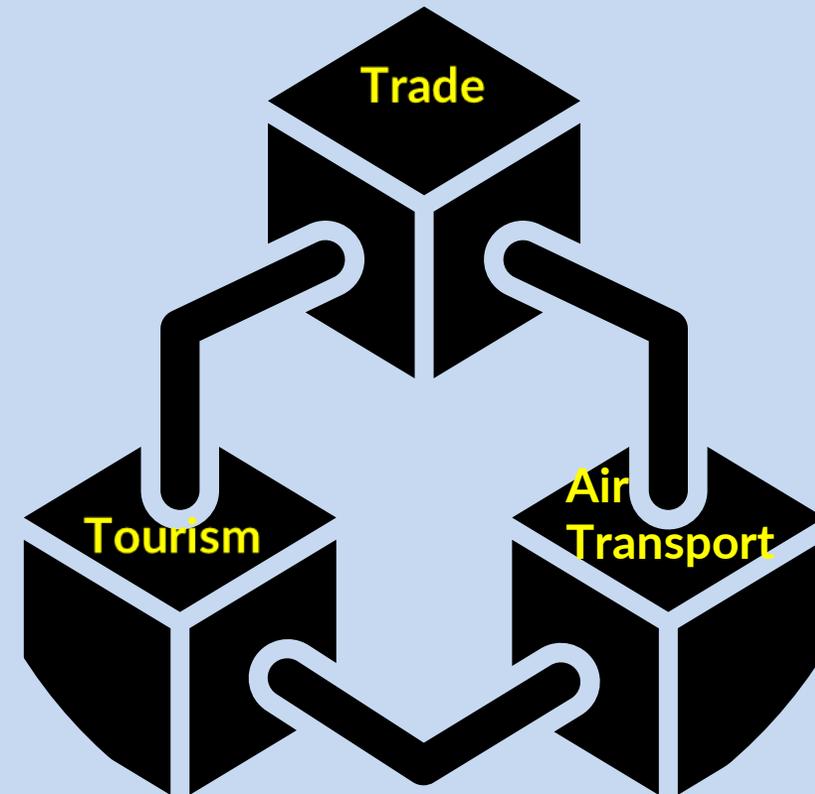
## Trading affordable hospitality products

- Increases consumable demands;
- Supports trade and air transport

AfCFTA and SAATM engage trade, tourism, and air transport in a virtuous cycle.

Together, the three sectors contribute to increasing Africa's middle class.

Conquering intra-Africa improves these industries' competitiveness in global markets.



# How do we get there??

## Challenges

- **Reciprocity** – applying the rules uniformly
- **Protectionism** – hiding behind sovereignty
- **Inadequate infrastructure** – service providers eg.airports
- **Restrictive legalese** – non physical barriers
- **Insufficient & inadequate** economic regulatory oversight
- **Prohibitive Taxes, Fees and Charges** – airlines are targeted
- **Comprehension** of the rule book



## Recommendations

- Include airlines in formulation of policy & regulations
- Progressive dynamic regulatory frameworks to enhance business environment.
- Reduce/eliminate excessive taxes and charges.
- Encourage collaboration- (SPAs, interline, codeshare, JV, Commercial agreements)
- Invest in aviation infrastructure development and maintenance.

# FREEDOMS

1				
2	ChangeType	Airline	Departure	Arrival
3	New 5th Freedom	Transair Senegal	Abidjan	Bamako
4	New 5th Freedom	Air Cote d'Ivoire	Abuja	Lome
5	New 4th freedom	Azman Air	Abuja	Goma
6	New 5th Freedom	Kenya Airways	Accra	Dakar
7	New 4th freedom	Air Cairo	Alexandria	Casablanca
8	New 4th freedom	Air Algeria	Algiers	Johannesburg
9	New 5th Freedom	Mauritanian airlines	Bangui	Cotonou
10	New 4th freedom	Jubba Airways	Bosaso	Djibouti
11	New 4th freedom	Tarco Aviation	Cairo	Port Sudan
12	New 5th Freedom	Ethiopian airlines	Conakry	Ouagadougou
13	New 5th Freedom	Afrijet	Cotonou	Sao Tome
14	New 4th freedom	Ceiba	Cotonou	Malabo
15	New 4th freedom	Air Tanzania	Dar Es Salaam	Lubumbashi
16	New 4th freedom	Jubba Airways	Galcaio	Nairobi
17	New 5th Freedom	LAM Mozambique	Harare	Lusaka
18	New 4th freedom	Jubba Airways	Hargeisa	Djibouti
19	New 4th freedom	Jubba Airways	Hargeisa	Nairobi
20	New 4th freedom	Air Algeria	Johannesburg	Algiers
21	New 5th Freedom	Kenya Airways	Johannesburg	Mahe Island
22	New 4th freedom	Airlink	Johannesburg	Nairobi
23	New 4th freedom	Airlink	Johannesburg	Antananarivo
24	New 4th freedom	Cemair	Johannesburg	Maun
25	New 4th freedom	Afrijet	Libreville	Kinshasa
26	New 4th freedom	Afrijet	Libreville	Principe Island

# FREEDOMS

27	New 4th freedom	Compagnie aerienn	Lubumbashi	Johannesburg
28	New 4th freedom	Ceiba	Malabo	Lome
29	New 4th freedom	Eswatini air	Manzini	Cape Town
30	New 4th freedom	Eswatini air	Manzini	Durban
31	New 4th freedom	Eswatini air	Manzini	Harare
32	New 4th freedom	Eswatini air	Manzini	Johannesburg
33	New 4th freedom	Berniq Airways	Misurata	Tunis
34	New 4th freedom	Fly Oya	Misurata	Tunis
35	New 4th freedom	Jubba Airways	Mogadishu	Djibouti
36	New 4th freedom	Jubba Airways	Mogadishu	Nairobi
37	New 4th freedom	Safarilink	Mombasa	Zanzibar
38	New 4th freedom	Auric Air	Mwanza	Entebbe
39	New 4th freedom	Camair-co	N'djamena	Douala
40	New 4th freedom	Air Tanzania	Ndola	Dar Es Salaam
41	New 5th Freedom	Asky airlines	Ouagadougou	Lagos
42	New 4th freedom	Afrijet	Pointe-Noire	Kinshasa
43	New 5th Freedom	Ceiba	Pointe-Noire	Cotonou
44	New 4th freedom	Alexandria airlines	Sharm El-Sheikh	Casablanca
45	New 4th freedom	Alexandria airlines	Sharm El-Sheikh	Marrakech
46	New 4th freedom	Alexandria airlines	Sharm El-Sheikh	Tangier
47	New 4th freedom	Fly Oya	Tripoli	Alexandria
48	New 4th freedom	Fly Oya	Tripoli	Tunis
49	New 4th freedom	Berniq Airways	Tripoli Mitiga	Cairo International
50	New 4th freedom	Medsky	Tunis	Tripoli Mitiga

# THANK YOU

**Amasagnalao**

**Asante**

**E se**

**Enkosi**

**Merci**

**Obrigado**

**Tautotera**

**Tatenda**

**Thank  
you**

**Siyabonga**

**Shukran**

**Zikomo**

[Denis K. Kimani](#)

[dnnskmn@gmail.com](mailto:dnnskmn@gmail.com)

[kimanid@iata.org](mailto:kimanid@iata.org)

+254-723309029