



ASSEMBLY — 42ND SESSION

ECONOMIC COMMISSION

Agenda Item 26: Economic Development of Air Transport

AIR TRANSPORT LIBERALIZATION - OPERATIONALISATION AND IMPLEMENTATION OF THE SINGLE AFRICAN AIR TRANSPORT MARKET

(Presented by the African Civil Aviation Commission (AFCAC) on behalf of its 54 Member States²)

EXECUTIVE SUMMARY

The Single African Air Transport Market (SAATM), launched in 2018 as part of the African Union's Agenda 2063, aims to liberalize Africa's air transport sector, enhance connectivity, and promote economic integration. Despite the progress, including the participation of 38 Member States, increased air connectivity, and infrastructure development, challenges such as regulatory inconsistencies and financial constraints continue to hinder implementation. To address these barriers, the SAATM Pilot Implementation Project (PIP) was launched in 2022 to accelerate market liberalization. This paper emphasises the need for the International Civil Aviation Organization (ICAO), regional organisations, and international stakeholders to support regulatory harmonisation and the ongoing review of the ICAO Template Air Services Agreement (TASA) for multilateral air services agreements and approaches to align with modern aviation realities, ensuring air transport's sustainable development.

Action: The Assembly is invited to:

- take note of the achievements and challenges in SAATM implementation;
- encourage ICAO to fast-track the ongoing review of model clauses in the TASA for multilateral air services agreements and approaches; and
- encourage ICAO and international partners to support measures to address capacity gaps in States through peer-to-peer sharing of experiences, case studies, and lessons learned regularly in line with global best practices.

<i>Strategic Goals:</i>	This working paper relates to Strategic Goal: The Economic Development of Air Transport Assures the Delivery of Economic Prosperity and Societal Well-Being for All
<i>Financial implications:</i>	To be determined.
<i>References:</i>	Decision Relating to the Implementation of the Yamoussoukro Declaration Concerning the Liberalisation of Access to Air Transport Markets in Africa [AHG/OUA/AEC/Dec.1(IV)] AND ANNEXES Revised African Civil Aviation Policy. 2023 Africa Aviation Infrastructure GAP Analyses Final Report

¹ English and French versions provided by AFCAC.

² Algeria, Angola, Benin, Botswana, Burkina Faso, Burundi, Cameroon, Cabo Verde, Central African Republic, Chad, Comoros, Congo, Cote d'Ivoire, Democratic Republic of the Congo, Djibouti, Egypt, Equatorial Guinea, Eritrea, Eswatini, Ethiopia, Gabon, Gambia, Ghana, Guinea, Guinea-Bissau, Kenya, Lesotho, Liberia, Libya, Madagascar, Malawi, Mali, Mauritania, Mauritius, Morocco, Mozambique, Namibia, Niger, Nigeria, Rwanda, Sao Tome and Principe, Senegal, Seychelles, Sierra Leone, Somalia, South Africa, South Sudan, Sudan, Togo, Tunisia, Uganda, United Republic of Tanzania, Zambia, Zimbabwe.

1. INTRODUCTION

1.1 Africa has long recognised the importance of multilateralism in fostering economic integration and development. The Yamoussoukro Decision (YD) 1999 and its subsequent operationalisation through the Single African Air Transport Market (SAATM) remain crucial in liberalizing the continent's air transport sector. SAATM, launched in 2018, is a flagship project under the African Union's (AU) Agenda 2063 and aims to create a single, unified air transport market and represents a monumental step towards the liberalization of air transport in Africa, aimed at enhancing connectivity, facilitating the free movement of people and goods across the continent, promoting economic growth and regional integration. Since its inception, SAATM membership has grown to 38 committed States, demonstrating increasing political will to enhance intra-African air transport.

1.2 Furthermore, SAATM plays a crucial role in the successful operationalisation of the African Continental Free Trade Area (AfCFTA), another key AU initiative officially launched in 2021, designed to boost intra-African integration by enhancing free trade and movement through an efficient, competitive and sustainable liberalized air transport market.

1.3 However, despite these achievements, the implementation of SAATM faces several challenges. Consequently, in November 2022, AFCAC launched the Single African Air Transport Market Pilot Implementation Project (SAATM-PIP) to advance the African liberalization journey. SAATM-PIP is an initiative aimed at accelerating the implementation of the YD and SAATM through an approach which clusters small groups of countries to promote the benefits and address the implementation impediments.

2. DISCUSSION

2.1 Achievements of SAATM Implementation

2.1.1 The implementation of the YD/SAATM continues to make steady progress. AFCAC, as the Executing Agency of the YD/SAATM, has been working closely with Member States, Regional Economic Communities (RECs) and key stakeholders to advance air transport liberalization across Africa. Some of the key achievements include the following:

- a) **Membership Growth:** To date, 38 AU Member States have signed up for SAATM, representing over 80% of intra-African air traffic;
- b) **Increased Connectivity:** SAATM has facilitated a rise in intra-African air connectivity from 14.5% to 23%, with African operators launching 108 new routes between September 2022 and April 2025, including 19 fifth-freedom routes;
- c) **Infrastructure Development:** AUC, AFCAC, the International Civil Aviation Organization (ICAO) and other partners conducted the 2023 aviation infrastructure gap analysis for Africa, including a 25-year air traffic forecast, in which gaps were identified and require collaborative efforts to resolve in support of SAATM;
- d) **Policy Alignment with Global Standards:** SAATM aligns with ICAO policies on safety, security, and environmental sustainability, ensuring Africa's integration into the global aviation network;
- e) **Regulatory Harmonisation:** AFCAC has launched the SAATM PIP, which aims to remove barriers to full implementation by harmonising regulatory frameworks per the YD's provisions;
- f) **Infrastructure and Connectivity Enhancement:** Some key airports and air navigation service providers are being upgraded to support increased traffic flows under SAATM;

- g) Capacity Building and Advocacy: AFCAC has intensified its advocacy efforts, working with Member States, RECS and industry stakeholders to fast-track the signing of the SAATM solemn commitment and foster airline collaboration; and
- h) AFCAC resolves various market access, authorisation, and designation challenges among States.

2.2 Challenges in SAATM Implementation

2.2.1 Key obstacles persist, including regulatory inconsistencies that hinder full liberalization due to restrictive Bilateral Air Services Agreements (BASAS). There are concerns over competition, the protection of national carriers, infrastructure and capacity gaps, financial constraints, visa restrictions across borders and sluggish policy harmonisation that limit the full implementation of SAATM.

2.2.2 Given the evolving nature of global air transport, there is a growing need to review and modernise the YD to ensure it aligns with contemporary aviation demands. A comprehensive update is required to integrate new AU policies, the rise of digital platforms, cybersecurity threats, and e-commerce-driven aviation services, which necessitate regulatory adaptation. This also encompasses ICAO's environmental commitments, technological advancements and lessons learned from global disruptions. Strengthening the regulatory framework will enhance the competitiveness and sustainability of air transport development.

3. CONCLUSION

3.1 The success of regional initiatives relies on international and regional cooperation. ICAO could play a critical role in advocating for financial investments to support air transport development. Effective harmonisation of the regulatory framework can be achieved through collaboration between ICAO, regional organisations and Member States. Reviewing and modernising the ICAO Template Air Services Agreement (TASA) for multilateral air services agreements and approaches will be instrumental in addressing contemporary challenges. ICAO can also host technical exchange or peer assessment events where participants evaluate each other's systems and provide constructive feedback, referencing international benchmarks to inspire replication and build credibility around peer learning.

3.2 By implementing these measures, regional organisations, ICAO, and the international community can ensure that regional initiatives reach their full potential, driving economic growth, enhancing connectivity, and improving competitiveness in air transport.

— END —