Summary Report of the Joint ICAO/AFCAC/IATA/AFRAA/AASA Regional Workshop on Aviation User Charges

28–30 October 2025, Dakar, Senegal

1. Overview

The Joint Regional Workshop on Aviation User Charges was held at the ICAO Western and Central African (WACAF) Regional Office in Dakar, Senegal, from 28 to 30 October 2025. The event brought together 67 participants from 23 States and six international and regional organizations.

The workshop provided a high-level platform for dialogue among States, service providers and air transport stakeholders to promote fair, transparent and cost-related user charge frameworks in Africa.

2. Highlights from Opening Remarks

AFCAC Secretary General – Framing the continental mandate

Context and importance: Africa's geography, dispersion and demographics make aviation an economic necessity. However, current cost structures keep many citizens excluded from air travel.

Problem: Taxes, fees and charges often represent 35–40% of ticket prices, well above the 20% global average, undermining SAATM, AfCFTA and the Free Movement Protocol.

Policy anchor: ICAO Doc 9082 principles—cost-relatedness, transparency, non-discrimination, and prior user consultation must underpin national regulatory frameworks.

AFCAC Initiatives: Completed a Continental Study on Taxes, Fees and Charges (validated 10 September 2025). Developed a Template on Economic Regulation and Continental Roadmap for Taxes, Fees, and Charges (TFC) reduction and harmonisation. Promoting national oversight and structured consultation mechanisms. **Call to action**: States are encouraged to follow ECOWAS' decision to abolish certain industry taxes and reduce passenger and security charges, leveraging aviation as an enabler of trade, tourism and employment rather than a source of quick fiscal revenue.

AFRAA – Airline Competitiveness Under Pressure

Industry outlook: Despite recovery post-COVID-19, African carriers remain marginally profitable, with an expected $200 million profit in 2025 ($1.30 per passenger). That is a fragile margin.

Cost drivers: Jet fuel prices are 30% higher than the global average. Departure and navigation fees above global norms. Short-haul fares are up to 45% higher than comparable routes elsewhere.

Risks: Without corrective measures, African airlines risk declining competitiveness, with adverse effects on connectivity and regional integration.

Regulatory perspective: AFRAA advocates balanced consumer protection frameworks that safeguard passengers without escalating airline costs. A position paper on the ECOREG initiative will be submitted accordingly.

AASA – Practical Levers to Reduce Costs

Situation: Southern African carriers face rising fuel, labour, and user charge costs, with surcharges sometimes exceeding base fares.

Good practices: Some States apply ICAO-aligned consultation procedures, improving predictability and fairness.

Proposals:

- Freeze selected airport charges for three years to stabilise planning during demand recovery.
- Link ANSP charges to performance-based Service Level Agreements (SLAs).
- Reject arbitrary levies (e.g., general revenue API fees) not linked to actual service costs.
- Standardise user charge frameworks across Regional Economic Communities (RECs) by January 2026, supporting SAATM implementation and reducing administrative burdens.

IATA – Reinforcing Collaboration and Policy Alignment

Core message: All stakeholders share the objective of establishing fair, transparent and sustainable user-charge systems.

Success factors: Strict adherence to ICAO's guiding principles—cost-relatedness, transparency, non-discrimination, and consultation with users.

Path forward: Building trust through collaboration will foster efficient, equitable, and sustainable frameworks that enhance connectivity and stimulate socio-economic growth across Africa.

ICAO WACAF Regional Director – Ensuring Global Policy Discipline

Policy baseline: ICAO's policies on airport and air navigation service charges and taxation on international air transport are not optional but essential to reinforce all revisions or new charges and taxes.

Procedural standards: Changes must be evidence-based, transparent and subject to consultation, ensuring fairness and investor confidence.

Partnership ethos: Sustained dialogue and harmonised approaches among States, airports, ANSPs and airlines are essential for maintaining affordability while ensuring service providers' financial sustainability.

3. Technical Presentations and Panel Discussion

Presentations were delivered by ICAO, ACI, IATA and AFRAA, and are available on the workshop website https://www.icao.int/WACAF/meetingdocs?fid=7868#block-icao-page-title

AFRAA also facilitated a panel discussion on the regional economic outlook and prevailing challenges, which further enriched the exchange of perspectives. The panel discussion focused on key economic challenges confronting airlines, airports and ANSPs. Panellists outlined their significant constraints, which included high cost, inadequate infrastructure and equipment, brain drain, aircraft maintenance and re-delivery cost, monopoly service providers, payment in local currencies, taxes, fees and charges, blocked funds, geo-political issues, low traffic volumes, access to capital, and low profitability, among others.

4. Cross-Cutting Diagnosis

Costs remain the critical constraint: Excessive taxes and non-cost-related charges elevate African airfares, suppressing demand and limiting frequency and load factors.

Policy alignment but weak implementation: While ICAO Doc 9082 principles are widely endorsed, many national regimes lack independent oversight, transparency and consultation predictability.

Balancing competitiveness and consumer protection: Passenger protection measures must avoid unintended cost increases that compromise connectivity.

Positive momentum: The ECOWAS initiative, AFCAC's TFC Study, and examples of effective State – user consultations illustrate that progress is achievable through sustained leadership.

5. Strategic Recommendations and way forward

- Adopt or update national economic regulation frameworks aligned with ICAO Docs. 9082 and 8632, incorporating:
  - ✓ Statutory texts and charges for cost-relatedness and non-discrimination.
  - ✓ Mandatory consultation timelines before charge revisions.
  - ✓ Disclosure of cost bases and traffic assumptions.
  - ✓ Establishment of independent oversight mechanisms.
- States to refrain from imposing administrative or other fees for the processing of overflight permits as such charges are not consistent with the provisions of Article 15 of the Chicago Convention.
- Fast-track REC-level harmonisation of charge categories, definitions, and methodologies, starting with ECOWAS as a pilot to enhance comparability and simplify billing.

- Consider implementing a three-year moratorium on selected airport charges (where financially viable) paired with performance improvement plans to exchange stability for efficiency gains.
- Establish fuel price task forces at State or REC levels to address taxation and logistical inefficiencies that keep African jet fuel about 30% above global averages.
- Institutionalise annual multi-stakeholder consultations with pre-shared data on audited cost bases, forecasts, capital plans, and service quality.
- Develop an AFCAC hosted Continental TFC Dashboard to track progress on charges, consultation practices, and compliance with ICAO Doc 9082.
- Mandate Regulatory Impact Assessments before any new tax or charge, including analysis of price elasticity and connectivity impact.
- Secure ministerial communique within RECs/through AUC endorsing SLAs and harmonisation efforts.
- Enhance public communication to demonstrate the tangible benefits of reduced charges new routes, lower fares, and job creation.
- Develop an arbitration procedure (IATA-led) for airlines when consultation processes with service providers fail.
- Clarify pre-funding arrangements for infrastructure projects, ensuring agreement between providers and users on the period of charge collection before project implementation.
- Airlines, airports, ANSPs and all stakeholders should establish a forum (virtual forum) where discussions on joint challenges could continue after the workshop. AFRAA to coordinate.
- States should endeavour to provide forex to airlines in countries where funds are blocked.
- Where traffic volumes support the case, there should not be a monopoly service provider.
- African States should support SAATM implementation as it will unleash the full potential of the aviation, trade and tourism sectors.
- The ECOWAS decision to eliminate taxes and reduce passenger and security charges is commendable and should be emulated by other RECs.
- Charges and fees must be commensurate with the level of services delivered.

- More training and capacity building are needed to sustain operations and curb the menace of brain-drain.

- IATA to explore ways that the “Building Blocks” concept can serve as a potential implementation tool for ICAO’s policies on charges, enabling meaningful consultation through shared data and common understanding.

- Conduct further advocacy and awareness initiatives to clearly distinguish between airport charges which are cost-based levies reinvested in airport operations and infrastructure, and which remain relatively lower in Africa, and aviation taxes, which are primarily fiscal measures aimed at raising general government revenue and are often not reinvested in the aviation sector.

- Develop a joint business model for Africa, coordinated by AFCAC with ACI, IATA, AFRAA, and AASA, to standardise parameters—such as the definition of revenue passengers—and improve transparency in charge structures.

- AFCAC study on aviation taxes/user charges and related roadmap for reduction including Economic Regulations in Africa should be included in reference materials set of the next workshop. AFCAC should report on the progress made for the implementation.

- Develop continental strategy to enhance SAF production within Africa. This would reduce dependency on volatile fossil fuel markets and create new industries.

- Airports may exercise flexibility to provide data on passenger forecast to airlines

- All aviation stakeholders may explore the impact of AI on charges while the system is maturing

- African countries have implemented the API-PNR system. There is a considerable discrepancy in data charges collected among these countries. The impact of data charges on financial performance of airlines is significant. There is a correlation between the charges and the cost of the system. In this context, remaining States are advised to carefully consider available options prior to adopting a specific API-PNR system. Therefore, AFCAC should advise remaining countries to consult airlines to any arrangements with vendors of the system for alignment to ICAO policies related to charges and affordable deals.

- Recommendation for continuity: Participants unanimously recommended that the Regional Workshop on User Charges be convened annually, with the next session proposed for 2026.