



Capacity Building Workshop on Drafting, Revising and Implementing
Competition Regulations in Air Transport Services in Africa

Status of Implementation of SAATM (2021–2026)

Accelerating Africa's Air Connectivity

Presenter: AFCAC Secretariat | 06 May 2026 | Kampala, Uganda

AFRICAN CIVIL AVIATION COMMISSION

What Is SAATM?

AU Flagship Project

SAATM is an African Union flagship project under **Agenda 2063**, rooted in the **Yamoussoukro Decision (1999)** – the legal foundation for liberalizing African skies.

Core Objectives

- Create a liberalized African air transport market
- Enhance intra-African connectivity
- Boost trade, investment, and regional integration



Strategic Importance of SAATM

SAATM is not just about aviation – it is a catalyst for Africa's broader economic transformation.



Trade

Supports AfCFTA goals by enabling faster, cheaper movement of goods



Tourism

Opens new routes connecting Africa's diverse destinations and reduce the travels time



Investment

Attracts foreign and intra-African capital flows

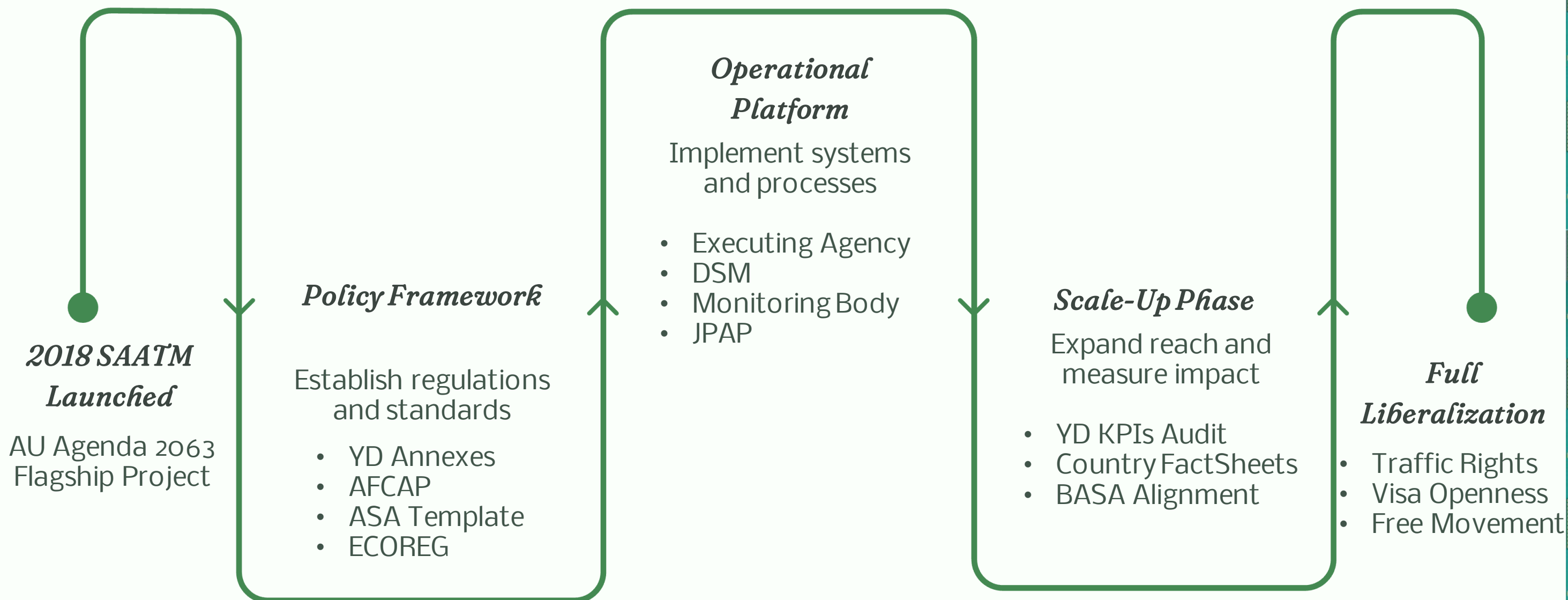


Mobility

Enables free movement of people and goods across the continent



Implementation Status Overview



SAATM has successfully transitioned from a policy framework to an operational implementation platform, with strong progress, measurable results, and continued momentum in the scale-up phase.

Political Commitment & Membership

38

Member States

SAATM participating states representing the majority of African aviation

80%+

Intra-African Traffic

Share of intra-African air traffic covered by SAATM members

26

Signed MoI

States that have signed the Memorandum of Implementation for Traffic Grants

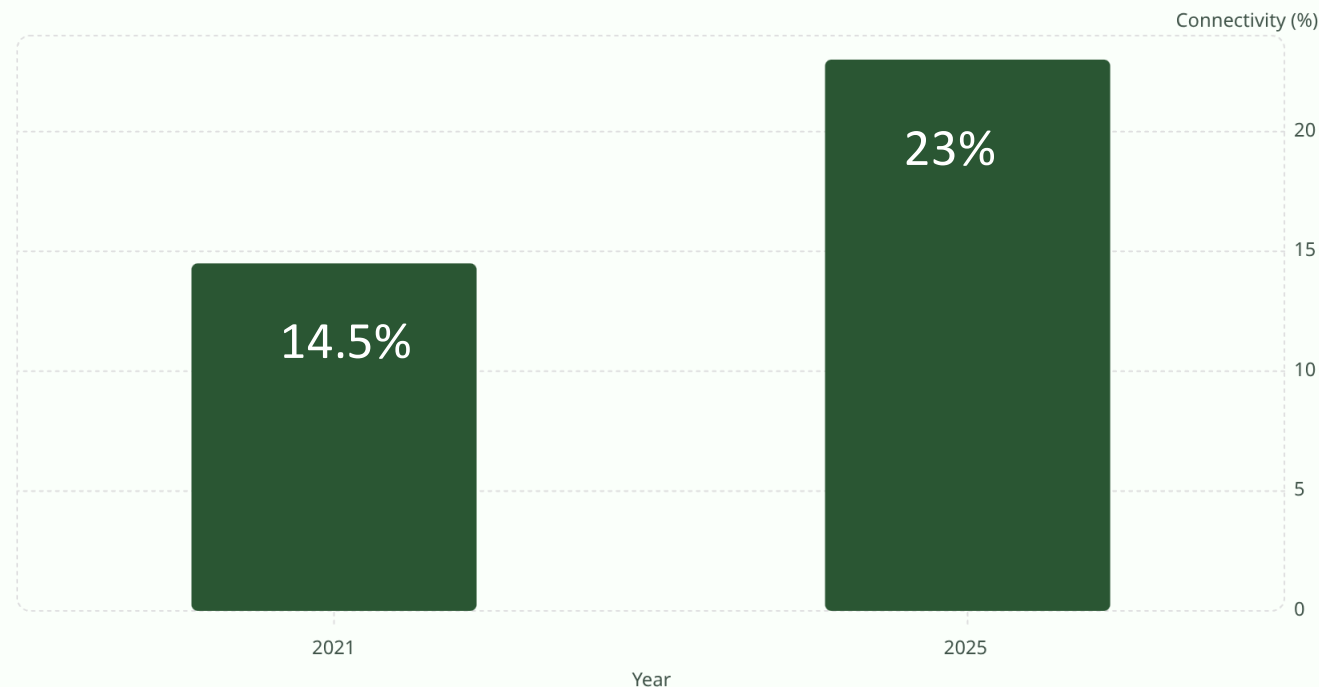
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In SAATM-PIP

States actively participating in the SAATM Project Implementation Plan aiming to accelerate liberalization

✔ Strong and growing political ownership across the continent – a foundation for accelerated implementation.

Connectivity Growth: Key KPI



Real Market Opening

Intra-African connectivity has grown from **14.5% in 2021** to **23% in 2025** – a gain of over 8 percentage points in four years.

This growth is supported by increased use of **5th freedom rights**, enabling airlines to carry passengers between two foreign countries as part of a longer international flight.

✔ Evidence of real, measurable market liberalization.

188 BASAs Negotiates | 162 (86%): YD Aligned



Route Expansion

2023

59 routes operational under SAATM framework

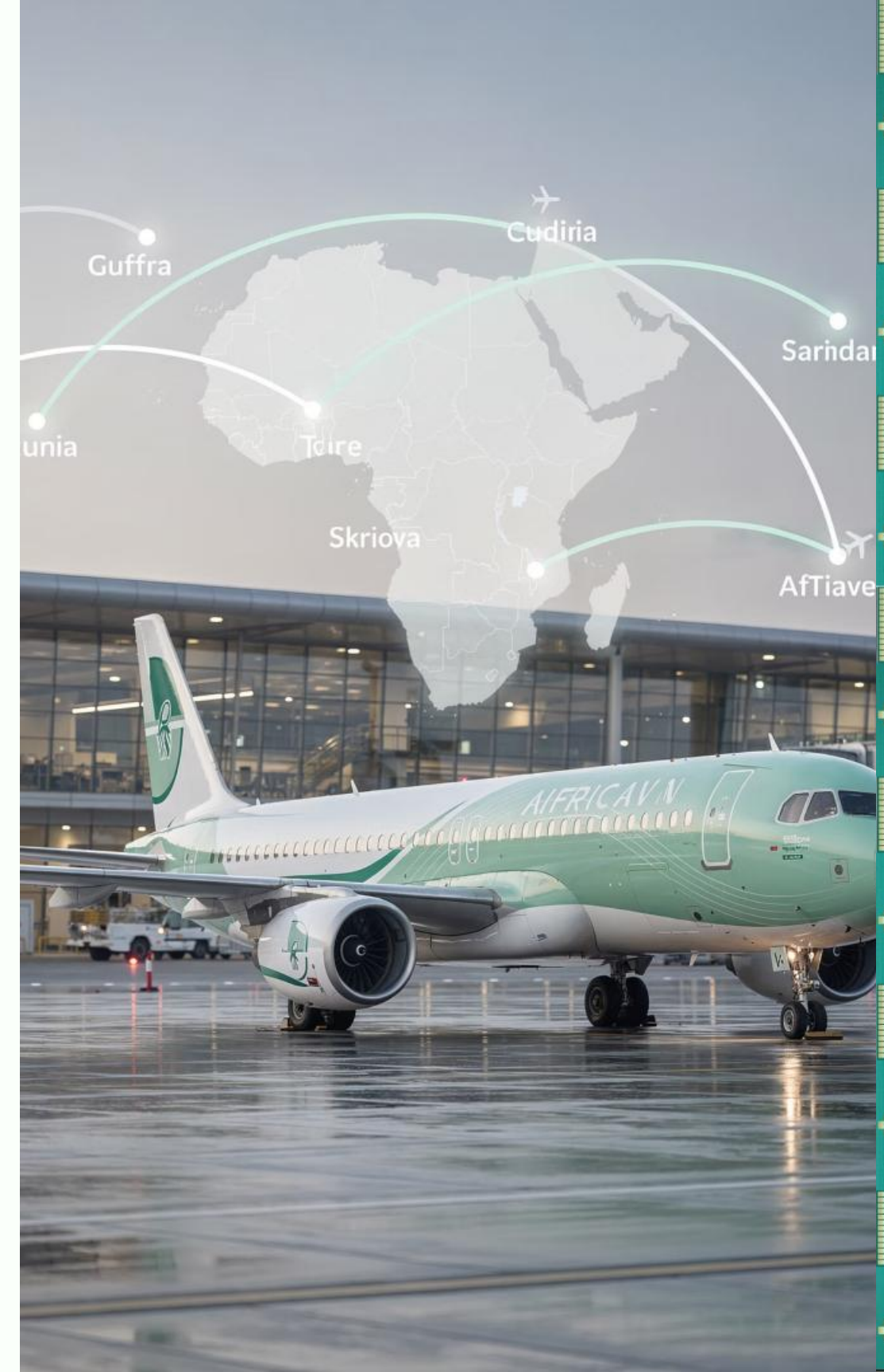
2026

124 routes – more than doubled in three years

5th Freedom

22 new routes actively using 5th freedom rights from 2023 to 2026

Airlines are responding to liberalization with concrete network expansion, demonstrating market confidence in the SAATM framework.



Traffic & Economic Impact

3M+

Additional Passengers

New travelers enabled by SAATM liberalization

8,200

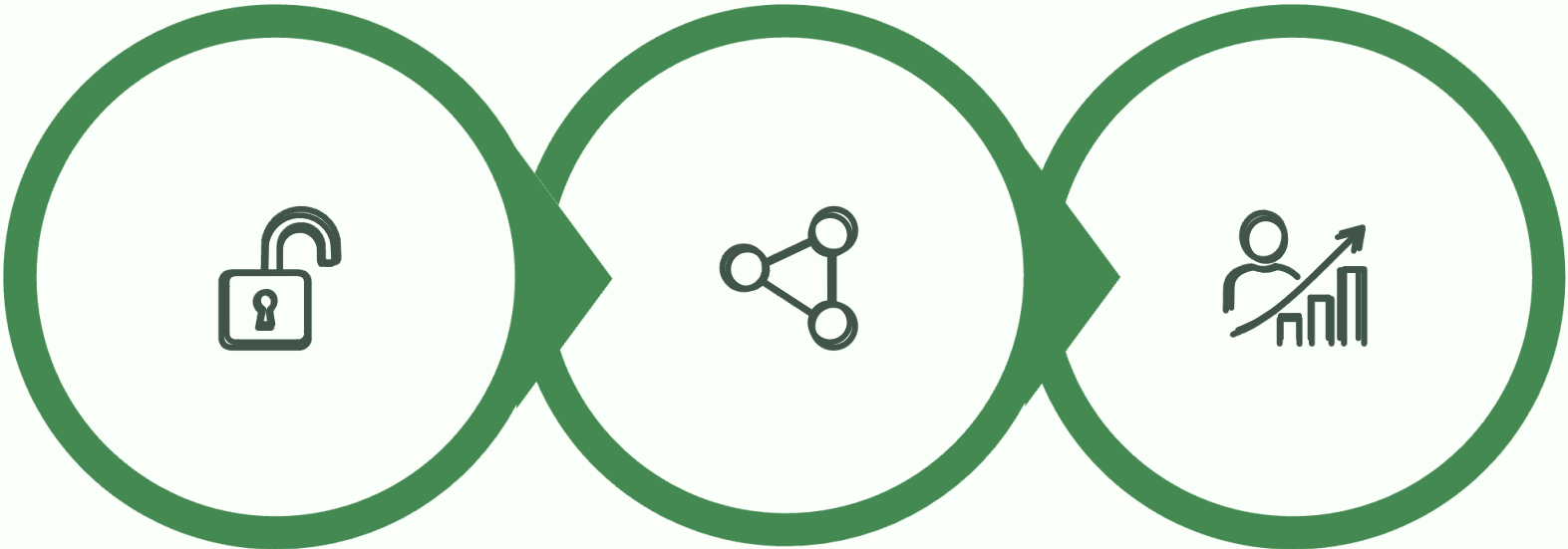
Jobs Supported

Direct and indirect employment generated

\$2.8B

Trade Enabled

USD value of trade facilitated through improved air connectivity



Liberalization

Connectivity

*Economic
Impact*

Accessibility & Facilitation Improvements

Visa & Travel Facilitation

Significant progress in reducing barriers to intra-African travel, with visa-free access expanding across the continent.

Examples of VISA free policy:

- Benin
- Rwanda
- Seychelles
- Kenya
- Ghana

31 Countries

Now offer e-visa facilities to African travelers

44+ States

Have issued biometric passports, improving border security and processing

Visa-Free Travel

Increased bilateral and multilateral visa-free arrangements across Africa

Affordability: A Persistent Challenge

Despite connectivity gains, high airfares remain a major constraint to demand and threaten to limit the full benefits of liberalization.

Airfares

45 - 60% higher than the global average, pricing out large segments of the African population

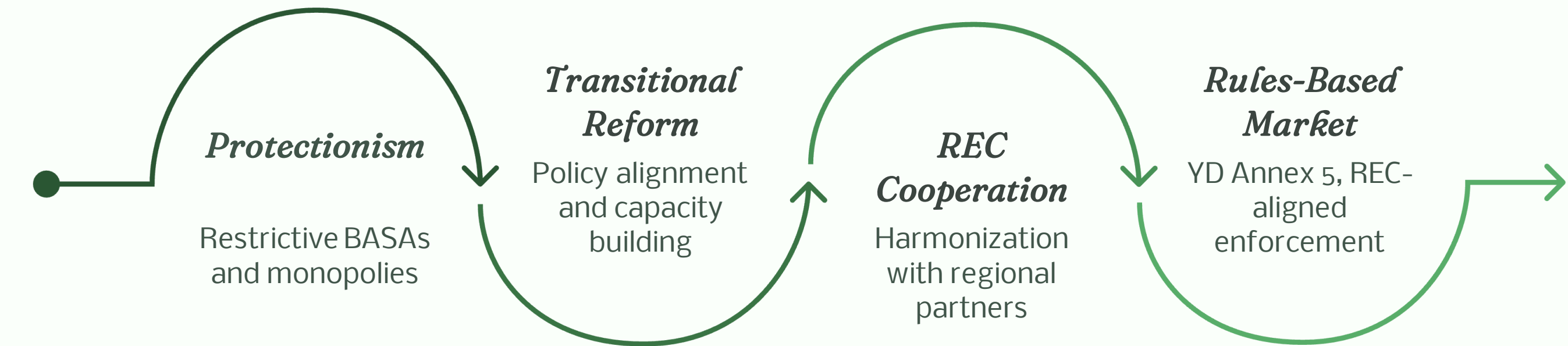
Taxes & Fees

20 - 25% higher than global norms, driven by excessive airport charges and government levies

⚠ Affordability must be addressed to unlock the full economic potential of SAATM.



Competition Regulation: Key Progress



→ *YD Annex 5 Implementation*

Competition rules under the Yamoussoukro Decision are being operationalized across member states
- Harmonization/Domestication

→ *REC Cooperation & AfCFTA*

Collaboration with Regional Economic Communities to harmonize competition frameworks (CCCC, EACCA, ERCA).

→ *Capacity Building*

Dedicated training programs for national competition and aviation regulation experts

Institutional & Regulatory Progress



AFCAC Executing Agency

Fully operationalized as the implementing body for SAATM



YD-Compliant BASAs

Standardized Bilateral Air Services Agreement templates adopted by member states



DSM Established

Dispute Settlement Mechanism in place to resolve market conflicts



12 States Audited

KPI monitoring system deployed with 13 states assessed for compliance



Capacity Building

1000+

Experts Trained

Across African states in aviation regulation and market management

Competition

Market regulation and anti-monopoly enforcement

Consumer Protection

Passenger rights and service standards

Economic Regulation

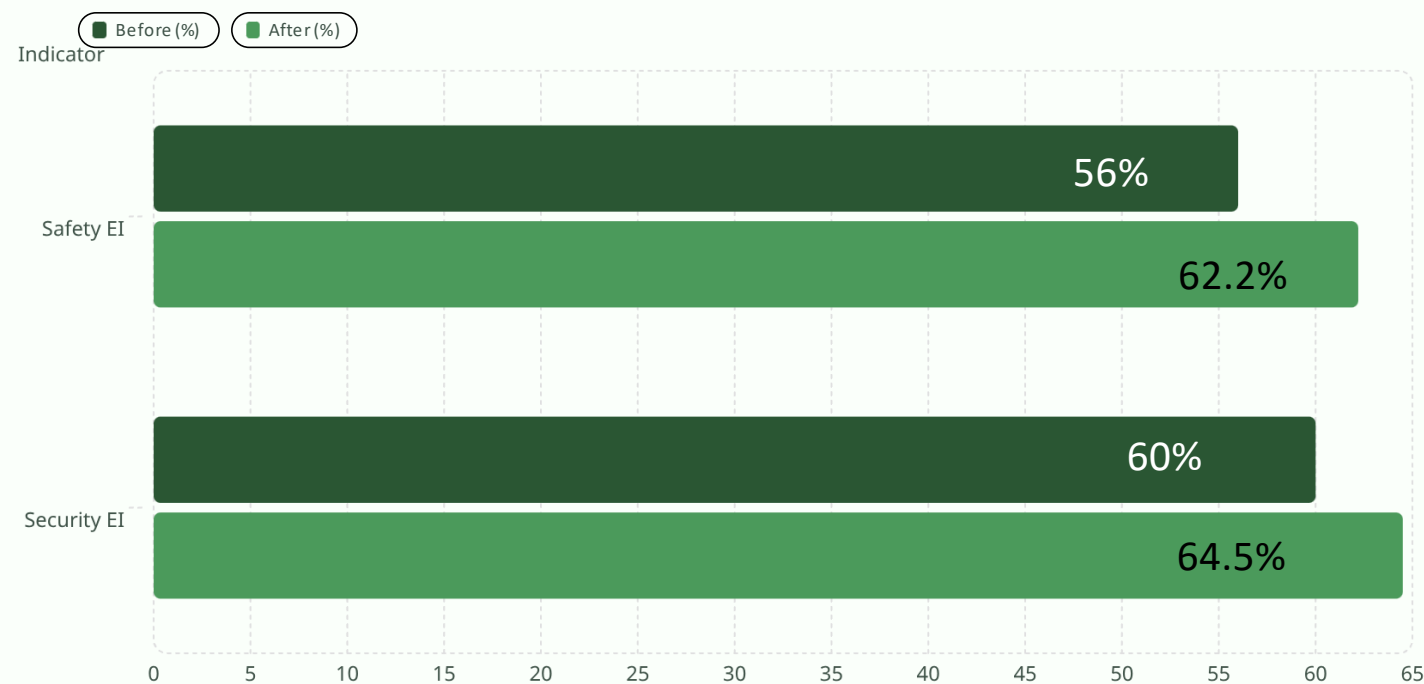
Taxes, charges and fees, ASA Alignment, tariff oversight and market access rules

Safety, Security & Environment

ICAO standards compliance and audit readiness



Safety & Security: Improving Compliance



Improved Global Compliance

Africa's Safety Effective Implementation (EI) score has risen from 56% to 62.2%, while the Security EI has improved from 60% to 64.5%.

These gains reflect sustained investment in ICAO compliance, audits, and targeted capacity building across member states.

✔ Safety and security improvements strengthen Africa's credibility as a global aviation partner.

Sustainability & Climate Alignment



SAF/LCAF Strategy

Sustainable Aviation Fuel and Low Carbon Aviation Fuel strategy formally adopted for African aviation



CORSIA Capacity Building

Member states supported in implementing the Carbon Offsetting and Reduction Scheme for International Aviation



Fuel Efficiency

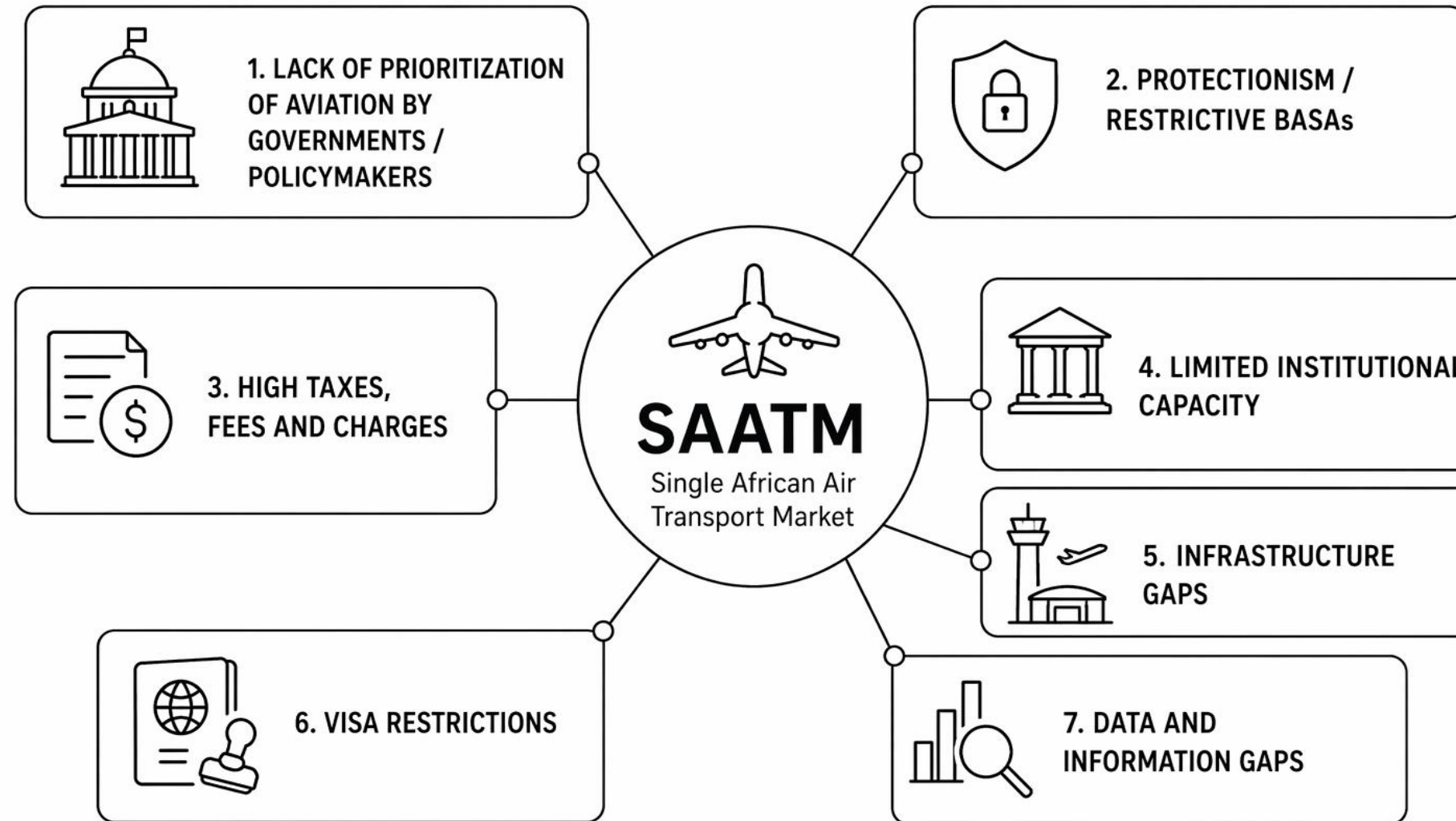
Operational improvements delivering measurable reductions in fuel consumption and emissions



African aviation is aligning with the global climate agenda while pursuing growth.



Key Constraints to Full Implementation



⚠ Implementation remains uneven – targeted action on each constraint is essential for full liberalization.



Strategic Message

Delivering Results

Measurable gains in routes, passengers, jobs, and trade since 2021



Generating Economic Value

USD 2.8 billion in trade enabled and 8,200 jobs supported

Driving Integration

SAATM is advancing the vision of a unified African market

❌ Full liberalization has not yet been achieved. The gains are real, but the journey is not complete.





Way Forward: Next Phase Priorities



Improve Data & Monitoring

Close data gaps and strengthen the KPI system for evidence-based policy
Implement the Online Framework - SAATM Dashboard



Scale SAF & Sustainability

Expand SAF/LCAF production and CORSIA compliance



Reduce Costs

Address excessive taxes, fees, and charges constraining affordability



Strengthen Competition Enforcement

Strengthen YD Annex 5 enforcement and REC cooperation mechanisms



Accelerate Market Opening

Convert remaining protectionist BASAs to YD-compliant agreements



Call to Action

1

Commitment

Political will is in place – now translate it into concrete implementation actions

2

Cooperation

Strengthen collaboration among States, RECs, and AFCAC to harmonize frameworks

3

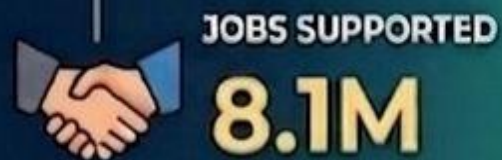
Empowerment

Provide AFCAC with the mandate, resources, and authority to enforce SAATM

SAATM is the engine of African integration. Every route opened, every barrier removed, and every expert trained brings Africa closer to a single, connected sky.

SAATM ACHIEVEMENTS AT A GLANCE: SINGLE AFRICAN AIR TRANSPORT MARKET

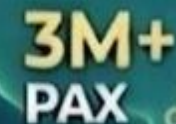
MACROECONOMIC IMPACT



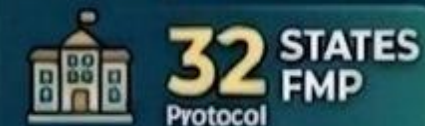
POLITICAL COMMITMENT



CONNECTIVITY

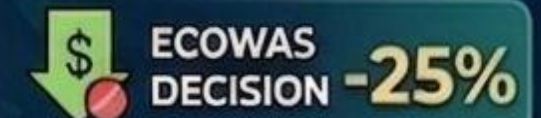


ACCESSIBILITY



AFFORDABILITY & SUSTAINABILITY

AFFORDABILITY

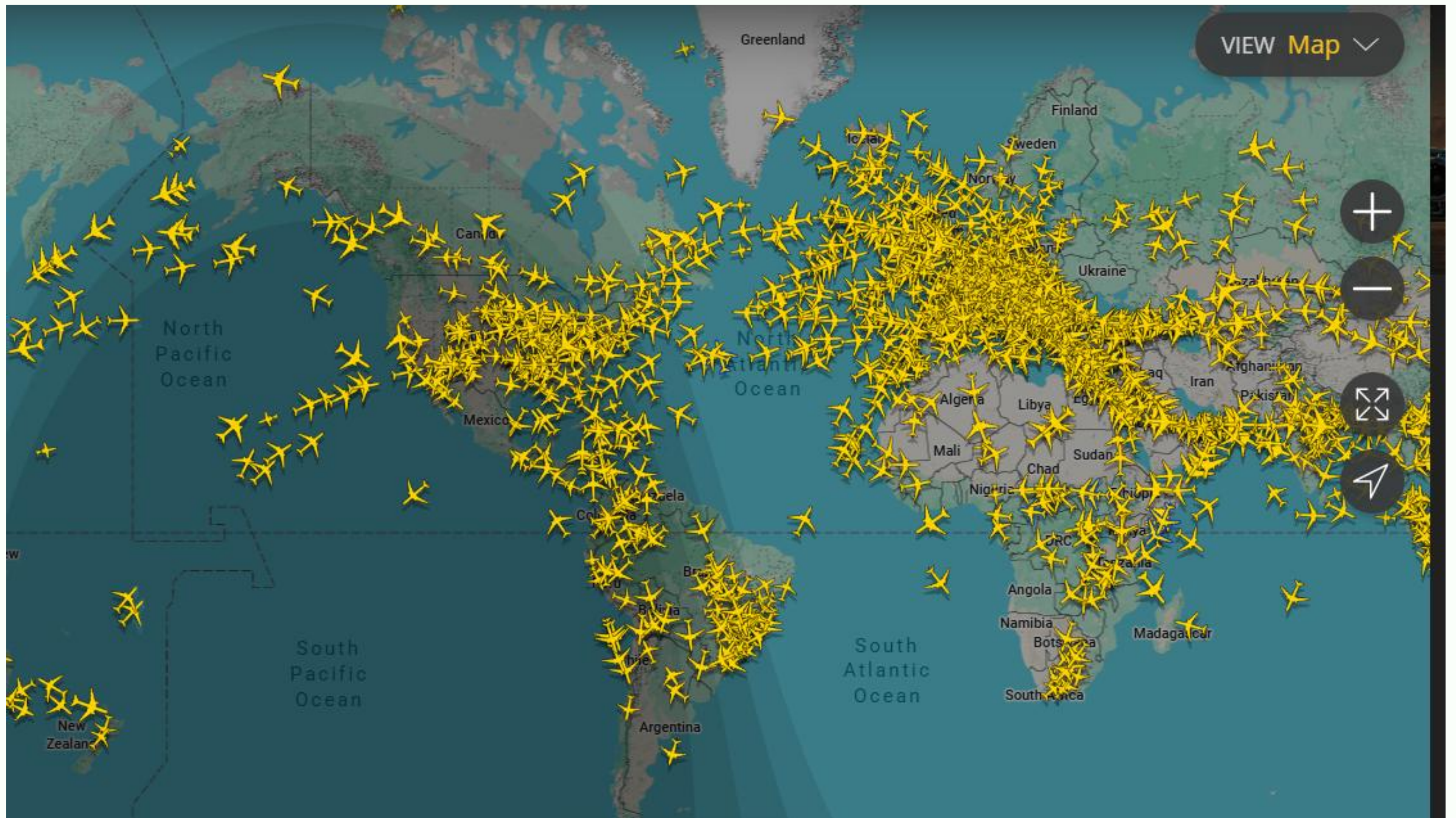


SUSTAINABILITY



SAFETY & SECURITY







Thank You

Together, we are building Africa's aviation future

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Flagship Project

Single African Air
Transport Market
(SAATM)

African Union

Agenda 2063