



The Single African Air Transport Market (SAATM)

Towards a Virtuous Cycle of Air Transport
Development in Africa





“Collaboration between all the stakeholders is important in ensuring the successful operation of the Market and the African Union Commission avails to work with the industry to fly higher this Agenda 2063 flagship project – The Single African Air Transport Market.”

DR. AMANI ABOUZEID,
Commissioner: Infrastructure and Energy

“We continue our collaborative efforts towards the successful realization of the SAATM with the aim of achieving the far sighted vision of a Single African Air Transport Market that will help spur the development of African Aviation.”

MR. ABDÉRAHMANE BERTHÉ,
AFRAA Secretary General



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Foreword by AFRAA Secretary General



Distinguished Colleagues,

It is my pleasure and honour to take this opportunity to bring this SAATM update to you, especially during this period when we gather for the 51st AFRAA Annual General Assembly. It is a year since the SAATM Handbook was published in collaboration with our partners IATA, the AUC and AFCAC. We have observed significant developments in the African Aviation industry since then.

First on my mind are the partnerships that were developed in recognition of the need to be committed to the spirit of working together. This SAATM update is one such example of the collaboration amongst partners, AFCAC, AFRAA, and the AUC. We have forged ahead with the determined focus of achieving our mutual objectives in accordance with the respective MoUs that we signed amongst ourselves.

“If you want to go fast, go alone; if you want to go far, go with others”.

The well-known African saying gives us all the opportunity to visualise the Africa we all want in direct relation to the African Union's Agenda 2063 proclamation. In the very near future we will be witnessing the combined positive impact

of the achievement of these objectives. In this publication we highlight the success stories from the time SAATM was launched in January 2018 to the latest increase in the number of signatories to SAATM.

AFCAC has played a significant role in coordinating the effort required to engage with all states and ensure that the non-signatories are given the opportunity to air their very valid concerns in an environment that seeks consensus for the mutual benefit of all parties. Thinking outside the box, I am convinced that as we focus on these actual challenges we shall identify suitable solutions to Address these concerns.

Indeed, AFCAC has gone further in conjunction with AFRAA, the AUC and IATA, to encourage the signatory states to proceed with the full implementation of the YD as envisaged by SAATM.

AFRAA and AFCAC are engaging on the framework of our MoU in order to ascertain that our mutual key strategic objectives are aligned and in so doing we will enrich the scope of our delivery to our stakeholders. As members of the SAATM monitoring body, AFRAA and AFCAC are in a unique position that enables our sister organizations to be able to integrate the voices of the airlines on the one hand as AFRAA, and the regulatory authorities and stakeholders on the other hand as AFCAC.

We continue our collaborative efforts towards the successful realization of the SAATM with the aim of achieving the far sighted vision of a Single African Air Transport Market that will help spur the development of African Aviation.

Abdérahmane Berthé

Secretary General

African Airlines Association

Foreword by AFCAC Secretary General



I take this opportunity to extend my congratulations to the AFRAA Secretary General on the sterling job that he and his team are doing to keep the momentum of the development and growth of African airlines as a top priority amongst all the stakeholders.

AFCAC and AFRAA have been engaging within the framework of the MoU to enhance our respective work programs and most recently agreed upon with tangible key performance indicators to ensure that we coordinate and harmonize our activities and deliver on our mutual objectives. These are amongst others to create an enabling operational environment for the sustainable development of a cost effective and efficient competitive intra-African air transport market that offers increased connectivity between city pairs. These shared but respective mandates as lead supporting institutions of the AU demands that we jointly promote and deliver on the SAATM's implementation as well as report to the Monitoring Body on the progress we are making.

We are equally cognizant of our role to initiate reforms that are necessary to reap the transformational socio-economic benefits associated with a harmonized single air transport market and to deliver on the AU's Agenda 2063 Flagship

Project. This is a challenge given the complexity of our operational environment and different regulatory systems across the African landscape without compromising on promoting the safety, security and environment friendly operations as well as orderly growth of aviation which we are very confident of achieving with the cooperation of AFRAA and other stakeholders such as the UNECA, and the AUC.

We are therefore, as the Executing Agency of the SAATM, excited with the progress made to date with the signing up of the increasing number of States to join the SAATM. We are also delighted to confirm that 31 member States have now signed up to the SAATM! Our strategic goals are significantly clear in their focus on the full operationalization of the Executing Agency and the full implementation of the SAATM and look forward to cast the net wider until all 55 member States of the AU sign up to the SAATM by 2023. It is very clear that African aviation must continue on its upward trajectory if we are to ensure that the benefits of aviation are felt and appreciated across the entire spectrum of African life as well as good for business and commerce. Our strategic goals are our roadmap, and we will continue to engage with our stakeholders as well as to participate in forums such as the AFRAA Annual General Assembly. This is where a significant part of the air operators that operate and are certified by African States reside and will therefore make every effort to not only listen to them, but to embrace their aspirations and become the catalyst for their achievements.

There is a lot of work ahead for all of us if we are going to make the Africa We Want a reality. AFCAC commits to being part of the team and we will do everything possible to support all the SAATM objectives.

In conclusion, I want to reiterate our commitment to our relationship with AFRAA and with the rest of the African Aviation fraternity.

Tefera Mekonnen

Secretary General

African Civil Aviation Authority

A. What is SAATM?

1. Definitions

The Single African Air Transport Market is a flagship project of the African Union Agenda 2063 designed to create a single unified market for air transport in Africa. When SAATM is fully implemented, the single market aims to allow significant freedom and access to air transport in Africa. It places the implementation of the Yamoussoukro Decision on the liberalization of Air Transport Market in Africa in relation to the achievement of the AU's Agenda 2063 objectives.

The Yamoussoukro Decision seeks to achieve the following:

- Harmonize Air Transport policies in order to eliminate non-physical barriers;
- Create an environment for the provision of safe, reliable, and affordable air transport services necessary for the free movement of people, goods and services in Africa.

The primary objective of SAATM can be summarized as to fully implement the YD, thereby enabling all signatories to lift market access restrictions imposed on airlines. It also addresses the need to remove restrictions on ownership, enable granting of air traffic rights and liberalizing frequency and capacity limitations for both passengers and cargo operations.

2. Benefits of Airspace liberalization

Economic benefits

Organizations such as IATA, Oxford Economics, and the World Bank have produced reports from their various research efforts showing that there is a positive outcome to the economies of the countries that liberalize their skies.

The positive impact of air space liberalization in Africa extends beyond the obvious beneficiaries, namely passengers and cargo, and goes further to facilitate trade and tourism.

The anticipated improvement in schedules, network and route development ensures that the existing and the new operators will offer new routes, more frequencies, improved connections and lower fares. This will have the desired effect of market stimulation thereby increasing the number of passengers and tonnage of freight. The economies of the liberalized states will be the beneficiaries of liberalization as they will realize an increase in trade which provides employment and improves the livelihoods of their citizenry.

Tourism will increase and positively impact the downstream communities and economies as employment increases. It is reported that 1 in every 10 formal jobs in Sub-Saharan Africa is tourism related (World Economic Forum WEF2018) meaning that as tourism activities increase the employment rates increase as well.

Liberalization therefore stimulates the economy at large thereby enhancing the GDP of African countries. This will improve the welfare of ordinary citizens making Africans in general live a better life as envisaged by the AU's Agenda 2063.

Studies have shown a multitude of beneficiaries of liberalization such as but not limited to the following:

- Airlines
- Airports
- Hotels
- Destination Marketing Organizations
- Travel Management Companies
- Service Providers
- Recreation Facility Providers

Passenger benefits

The objective of liberalization is to enable people to travel wherever they want to travel to at a time of their choice at affordable rates in a safe environment. This freedom to choose has often been limited due to the restrictions imposed on airlines by the authorities in line with the existing air service agreements. Liberalization, therefore, brings much needed relief for passengers by enabling a competitive environment.

These are some of the benefits:

- Increase in direct services between various city pairs creating greater connectivity;
- Shorter travel time due to more airlines operating on more routes;
- Lower fares as a result of increase in African carriers operating intra-African routes;
- Enhanced mobility, convenience and freedom through increased city pairs, frequencies and competitive fares.

Trade benefits

(Supporting the African Continental Free Trade Area – AfCFTA). A World Bank study indicates that Intra-Africa trade is the least developed compared to intra-region trade in other regions of the world.

The intra-region trade comparison by exports indicates the following levels:

- Africa 17%
- Asia 59%
- Europe 69%

Africa's population accounts for 16% of the world's population and yet Africa's share of global trade is only 2%. The United Nations Economic Commission for Africa (UNECA) estimates that the operationalization of the AfCFTA could boost intra Africa trade by an additional 8% by 2022.

The African population estimated at 1.3 billion people is anticipated to result in a USD3.4 trillion economic-block with the implementation of the African Continental Free Trade Area. This will lead to an unparalleled phase of development for the continent.

Excitingly, this major opportunity for the development of the continent is within reach and it will take every effort by all sectors, including the aviation sector to be realized. Hence promotion of Intra-Africa trade will become an aviation strategic objective as it will provide opportunities in addressing SAATM challenges in the region. The implementation of SAATM is an enabler of the realization of this continental dream.

3. Regulatory framework

The transport sector Ministers adopted the regulatory text of the YD in 2014 including **(a)** The Powers and Functions of the Executing Agency; **(b)** Competition Rules; **(c)** Consumer Protection regulations.

The YD established the **Monitoring Body** whose membership comprises of the **African Union Commission (AUC)**, the United Nations Economic Commission for Africa (UNECA), the **African Civil Aviation Commission (AFCAC)** and the **African Airlines Association (AFRAA)**.

The roles of the Monitoring Body include the following:

- Bring to the attention of Ministers responsible for air transport any provisions of the YD that hinder the development of air transport in Africa;
- Analyze and plan for the periodic review of the YD;
- Ensure appropriate regulations are in place for the smooth functioning of the SAATM;
- Issue such directives as necessary to the Executing Agency of YD, in accordance with the powers and functions of the Executing Agency and AU procedures;
- Ensure the fair and equal application of the Yamoussoukro regulatory text on competition and consumer protection;

- Support the Executing Agency of YD in formulating proposals on studies, seminars, workshops, and other measures aimed at enhancing and updating air transport services in Africa;
- Ensure a seamless implementation of the YD between and within sub-regions and the realization of the SAATM across the continent;
- Ensure that the Executing Agency adopts and implements appropriate rules and regulations for the smooth management of the air transport in Africa.

AFRAA continued with their collaborative strategy of working closely with the AUC, AFCAC and IATA towards the adoption and implementation of SAATM by most of the AU member states in recognition of the benefits that accrue to the continent at large and to its member airlines with the liberalization of the African skies.

AFRAA participated in capacity building programs of states in conjunction with stakeholders. These efforts are bearing fruit as more states are signing up for SAATM.

AFRAA member airlines continue to be appraised of the benefits of liberalization in various forums and engagements. Encouragement is provided to the airlines and non-signatory states to elaborate their concerns so that mutually satisfactory solutions are sought.

B. Implementation

1. Concrete measures

The concrete measures are an effective way to establish a standard approach for all the states to follow and they can be summarized as follows:

1. States shall publish or gazette in accordance with their national laws:
 - (i) That they are committed to the immediate implementation of the Yamoussoukro Decision under the terms of the Declaration of Solemn Commitment in line with the AU Agenda 2063; and
 - (ii) That named signatories of the Declaration of Solemn Commitment have been notified of their action under point 2 below.
2. States shall notify other State Parties and especially signatories to the Declaration of Solemn Commitment that their skies are liberalised in accordance with the Yamoussoukro Decision.

3. Review of BASAs to ensure conformity with the Yamoussoukro Decision:
 - (i) Removal of all restrictions on traffic rights under the 3rd, 4th and 5th freedoms, frequencies, fares, and capacity; and
 - (ii) Ensure that all national Laws, Regulations, Rules, Policies are in conformity with the express provisions of the Yamoussoukro Decision.
4. States shall propose to the Executing Agency (AFCAC) at least one airline established in their state for international air services for consideration under the eligibility criteria article 6.9 of the Yamoussoukro Decision. The proposed airline can also be from another State Party or a multi-national African airline in accordance with article 6 of the Yamoussoukro Decision.
5. States shall immediately constitute their National Implementation Committees for the Yamoussoukro Decision and the establishment of a Single African Air Transport Market, designate a dedicated focal point and notify the RECS and the Executing Agency (AFCAC).
6. States are encouraged to organize public awareness activities/advocacy on YD and the Single African Air Transport Market.
7. States shall celebrate the YD (1999) on the anniversary of its signing on 14th November as part of advocacy for the promotion of AU Agenda 2063 in consultation with AFCAC.
8. States shall sign the Memorandum of Implementation of the Yamoussoukro Declaration, adopted in May 2018 by the Ministerial Working Group on the establishment of the Single African Air Transport Market.

2. Prioritized Action Plan

A prioritized action plan for the establishment and operationalization of SAATM involving all stakeholders was defined in 2018. It is based on six (6) pillars:

Pillar	Objective
1. Advocacy for effective operationalization of the SAATM	Advocacy and communication strategies. At least 10 new states sign for SAATM by end of 2019, and all by Jan 2021.
2. SAATM regulatory framework	Ensure availability of appropriate policy documents for the regulation of the SAATM. Member states and RECs are sensitized on the YD texts.

3. Operationalization of the SAATM	Capacity strengthening of implementing entities. Harmonization of policies on aeronautical taxes and charges and other non-tariff barriers
4. Aviation infrastructure	Planning for future traffic growth. Single African Sky architecture is established
5. Enhancing safety & security	All SAATM countries achieve the Abuja safety and Windhoek security targets
6. Aviation financing	Feasibility for the creation of a leasing platform for African airlines

3. Mol (Memorandum of Implementation)

Of specific interest is the SAATM recommended practice for member states to have a common legal multilateral protocol for granting market access, the elimination of Bilateral Air Service Agreements for intra-Africa traffic and the harmonization of national regulations to comply with the continental regulatory frameworks.

C. Current situation

The momentum gained with the signing of the Solemn Commitment by the 31 states is significant in that there is clear evidence of the acceptance and commitment by states to the AU Agenda 2063 SAATM flagship project. With this progress in mind it is important to note that there are still 24 states that have yet to sign their Solemn Commitment and every effort will be made to deal with these state's challenges and bring them on board.

AFRAA, AFCAC and the AUC are pressing on with the initiative of not only building capacity for states to sign up for SAATM but to ensure that all signatories achieve full implementation status as quickly as possible.

AFRAA has been actively involved with the roll out of these activities in conjunction with the AU, AFCAC and IATA as well as the RECs (Regional Economic Communities). Capacity building workshops have been held for stakeholders such as airlines, regulatory authorities and service providers as well as consumer interest groups. The main objective, in line with concrete measure number 6 and 8, is to highlight the progress of the signatories and to encourage them towards full implementation of SAATM whilst encouraging the non – signatories to sign up.

1. Map: SAATM Implementation progress, November 2019



2. Signatories States

31 SAATM Signatory States

1. Benin, 2. Botswana, 3. Burkina Faso, 4. Cabo Verde, 5. Cameroon, 6. Central African Republic, 7. Chad, 8. Congo, 9. Cote d'Ivoire, 10. DRC, 11. Egypt, 12. Eswatini, 13. Ethiopia, 14. Gabon, 15. Gambia, 16. Ghana, 17. Guinea, 18. Guinea Bissau, 19. Kenya, 20. Lesotho, 21. Liberia, 22. Mali, 23. Morocco, 24. Mozambique, 25. Niger, 26. Nigeria, 27. Rwanda, 28. Sierra Leone, 29. South Africa, 30. Togo, 31. Zimbabwe.

The 10 States implemented the 8 concrete measures

1. Benin, 2. Burkina Faso, 3. Cabo Verde, 4. Ghana, 5. Mozambique, 6. Niger, 7. Republic of Congo, 8. Rwanda, 9. The Gambia and 10. Togo.

The 31 SAATM states:

- Constitute more than 61% of AU member states;
- Their total population is more than 816 million people & they account for 70% of African population;
- Their combined GDP exceeded USD 1,700 billion in 2018, equal to more than 80% of Africa's total GDP.

18 Memorandum of Implementation signatory States

1. Benin, 2. Burkina Faso, 3. Cabo Verde, 4. Central African Republic, 5. Congo, 6. Cote d'Ivoire, 7. Ethiopia, 8. Gambia, 9. Ghana, 10. Guinea, 11. Liberia, 12. Mali, 13. Mozambique, 14. Niger, 15. Nigeria, 16. Rwanda, 17. Sierra Leone, 18. Togo.

3. Initiatives to date

AFRAA Secretary General participated in the capacity building and meeting of the monitoring body at the ECA in Addis Ababa in February 2019.

AFRAA participated in the capacity building workshops arranged by AFCAC and the AUC where all parties aired their views and highlighted the following:

- The liberalization of the African skies emphasized through the Joint Prioritized Action Plan that includes all stakeholders such as AFRAA, AUC, RECs, ICAO, IATA, African Development Bank;
- Participation in development of Air Transport Capacity Development Master Plan as part of the Joint Prioritized Action Plan;
- Joint activities with the Executing Agency to assist SAATM states to achieve Effective Implementation of SARPs focusing on Safety and Security – regional targets to be established to address the deficiencies;
- Advocacy on compliance with AFCAC and ICAO's Guidelines for economic oversight, charges and taxes;
- Participation in Capacity Building to domesticate and implement YD in SAATM signatory states.

The **AUC, AFRAA** and **AFCAC** will be holding a capacity building workshop for airlines in Nairobi on a date to be announced soon.

AFCAC in their role as the executing agency are pivotal to the success of the SAATM and full implementation of the YD. To that end AFRAA and AFCAC have established their respective focal points whose role is to ensure that the objectives set out in the cooperative initiatives are achieved.

AFCAC organized the capacity building workshop held in Kigali which enabled all stakeholders to address pertinent issues to enable the progress of SAATM. AFCAC plan to host a Capacity Building Forum in Niamey for the ECOWAS region.

AFRAA and AFCAC will continue with their collaboration on matters concerning the full implementation of YD by the signatory states that have achieved full compliance with the SAATM.

The African Aviation Industry Group (AAIG), an initiative of **AFRAA and IATA** meets immediately after every AFRAA Annual General Assembly and they have dedicated this year's forum to SAATM. The forum's theme is: **"African Aviation Post SAATM - A Practical Collaborative Guide for Stakeholders"** and will address matters pertaining to the Opportunities in a Liberalized African Market amongst other topics.

D. Challenges

The following challenges still need to be addressed:

- Reluctance to sign Solemn Commitment and Memorandum of Implementation;
- Delay in implementing and reporting on Concrete Measures by signatory states;
- Complex local procedures that delay the signing of the Memorandum of Implementation;
- Benefits of SAATM not fully understood and not embraced;
- Protectionism for fear of national carriers either being vulnerable or not ready for SAATM;
- Protectionism – in the form of restrictions to granting traffic rights on specific routes, and protecting slots;
- Granting limited frequencies, and restricted capacity;
- Unfair and restrictive existing agreements;
- Stifling of low cost carriers;
- High cost of operations due to unconventional taxes;
- Member States being very reluctant to review the restrictive BASAs.

E. Way forward and conclusion

Assuring progress

The Ministerial Working Group comprises of African Member States that have signed the Solemn Commitment. This group is responsible for the following:

- I. Following up implementation progress on the establishment of the single market;
- II. Providing guidance;
- III. Spearheading advocacy campaign to urge the rest of member states to join SAATM and ensure that Dispute Settlement Mechanism is in place.

It is important to note that member states wishing to join SAATM later are welcome to join the Ministerial Working Group.

The YD provided for the creation of the **YD Executing Agency** with responsibilities to supervise and manage the African liberalized Air Transport Industry. AFCAC is the Executing Agency as entrusted by the AU Conference of Ministers responsible for Air Transport in 2007.

The **Regional Economic Communities (RECs)** can also assist the monitoring body in its duties as required.

Period	Initiative	Partners	Lead	Outcome
Q1 2020	Execution workshops with Signatory states: 1 per REC	AFCAC, AUC	AFCAC	Achieve first SAATM execution register to monitor progress
Q1 2020	Capacity building workshop with African Airlines	AFCAC, AUC	AUC AFRAA	Awareness of SAATM instruments and benefits of liberalisation
Q1 2020	Engagements with non-signatory states: State by state approach	AFCAC, AUC	AFCAC AFRAA	Increase number of SAATM signatory countries
Q3 2020	Data analysis for signatory states with implementation initiatives	AFCAC, AUC	AUC AFRAA	Encourage more full YD implementation using example of implementing states
Q4 2020	Roadshows per REC to highlight overall success of SAATM	AFCAC, AUC	AFCAC	Encourage remaining non-signatory states to sign for SAATM

AFRAA as a member of the **Monitoring Body** carries the voice of all African Airlines. The Monitoring Body is essential for the oversight role that it carries, and it has advisory responsibilities to the Ministerial Working Group over the functioning of SAATM. Importantly, the Monitoring Body facilitates the smooth operation of the market at a strategic level as part of its contribution in supporting the Executing Agency.

Some states have voiced their concern on issues that they deem to be critical to the development and growth of the aviation industry in their respective countries. Some of the concerns are listed below:

- Allegations to the effect that SAATM will result in few bigger airlines dominating the market and the demise of smaller airlines;
- Limited room to grow for smaller operators thereby limiting competition and favouring bigger players;
- Ambiguity in interpretation of some of the regulatory texts pertinent to the following areas: Dispute resolution mechanism; Competition and Consumer protection; Powers and Functions of the Executing Agency.

AFCAC as the executing agency in conjunction with the Monitoring Body, in which AFRAA is a member, are actively addressing these concerns.

AUC, AFCAC, AFRAA will continue to engage with non-signatory states to sign their Solemn Commitment to set them in motion for the full implementation of the YD.

AFRAA and AFCAC Plan of Action for 2020

Implementation is going to be the focus of AFRAA and its stakeholders.

AFRAA in conjunction with AFCAC will compile and activate the stakeholders Focal Point Register in the first quarter of 2020.

AUC in conjunction with AFRAA and AFCAC will organize a capacity building workshop for African airlines.

AFRAA will engage with AFCAC and stakeholders to agree on an execution plan whose main objective is to enable the states to embrace and implement SAATM. This plan takes cognizance of the varying levels of adoption and or implementation readiness of each country as can be witnessed by the fact that on the one hand some of the countries have not yet signed their Solemn Commitment, and yet even amongst the ones that have signed and are implementation ready they have yet to implement.

The table below is AFRAA's action plan in conjunction with its Stakeholders to effectively address the countries and regions so that the parties can reach agreements on the signature and or implementation of SAATM as the case maybe.

Conclusion

Our mission as AFRAA is to promote and serve African airlines and to Champion Africa's aviation industry. There is no better way to achieve this noble cause than to achieve the full implementation of the YD by all member states.

The AUC, AFCAC, AFRAA and all stakeholders shall join their efforts towards the establishment of the SAATM (Single African Air Transport Market) which is a continuous process.



Why is the SAATM so important?

Africa is not well connected in terms of air services.

In many cases, the only way to get to countries within Africa is to travel for days or through other continents. This lack of connectivity is making Africa lose out immensely on socio-economic benefits and growth opportunities.



The SAATM is therefore a clear path for a more prosperous and secure African future.

What does SAATM mean in practice?

1 Eliminates the need for separate bilateral air service agreements (BASAs) between individual countries.

2 Promotes multilateralism for air transport in Africa, as envisaged under the YD, with a view to making the entire African aviation market a single market.

3 Any current or future air service agreement signed between any or all of the twenty-eight member States, must be YD compliant and must meet the below requirements:

- ☒ Free exercises of 1st, 2nd, 3rd, 4th and 5th freedom traffic to Eligible Airlines;
- ☒ Liberalized air tariffs;
- ☒ Unrestricted frequency and capacity;
- ☒ Full liberalization of cargo services;
- ☒ Recognition of the Powers and function of the Executing Agency – African Civil Aviation Commission;
- ☒ Adhere to the uniform rules for fair competition, consumer protection and other regulations.

“ Africa needs to move from the current situation of low choice, high fares and step into a new age of affordable and accessible air transport. ”



Essential pillars for a successful SAATM



Continuous improvement in Safety and Security



The effective operationalization of the Single Africa Air Transport Market (SAATM) through notification of implementation of the SAATM concrete measures.



Regulatory & policy harmonization.



Optimized infrastructure and establishment of a seamless Airspace Architecture.



Ease of intra-African mobility (Visas/customs)



Reduced taxes and charges (Competitiveness)



Strengthening the capacity of implementing agencies and Member States

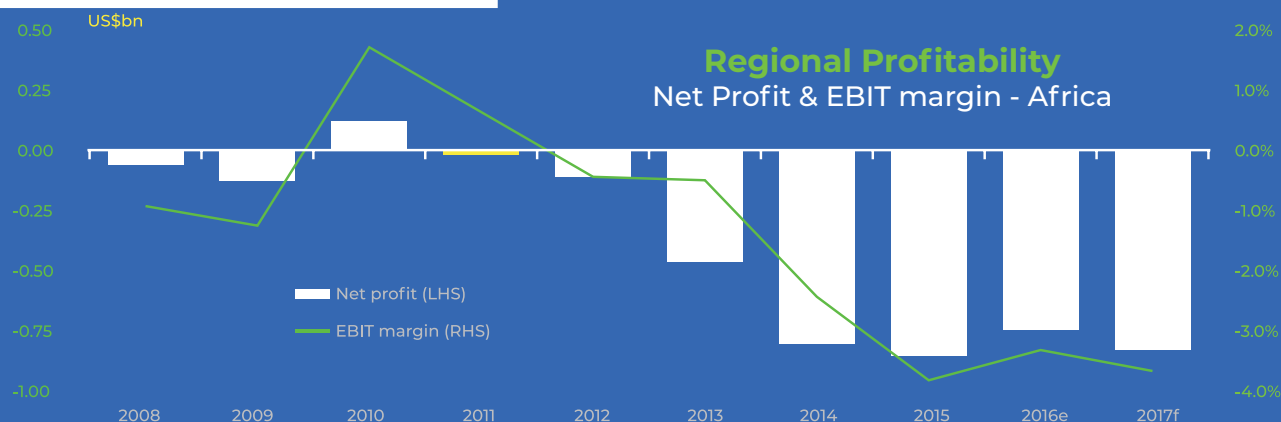


Human capacity development (Skills and personnel pipeline)



Multi-sector collaboration (Tourism, Finance, Health, Agriculture, Education etc.)

Implications of SAATM for the growth of African airlines



While the African market has much economic potential, there are considerable challenges that need to be addressed. These include high user charges and taxes, inadequate airport infrastructure, unfavourable regulatory environment, under-capitalization of African airlines and insufficient management expertise. These factors, amongst others, have contributed significantly to the low profitability of African airlines.

With the implementation of SAATM, intra-African connectivity will develop and there will be more growth opportunities for African airlines. As a result, aviation's role as an economic driver will grow significantly.



OCT 2019 Progress on SAATM IMPLEMENTATION BY STATES

31 countries

have signed the Solemn Commitment: **Benin, Botswana, Burkina Faso, Cameroon, Cabo Verde, Central African Republic, Chad, Republic of Congo, Côte d'Ivoire, Egypt, Ethiopia, Gabon, The Gambia, Ghana, Guinea, Kenya, Lesotho, Liberia, Mali, Morocco, Mozambique, Niger, Nigeria, Rwanda, Sierra Leone, South Africa, Togo, Democratic Republic of Congo (DRC), Eswatini, Guinea Bissau and Zimbabwe.**

10 out of 31

SAATM States have implemented all the SAATM concrete measures mandated by AFCAC:

Benin, Burkina Faso, Cabo Verde, Ghana, Mozambique, Niger, Republic of Congo, Rwanda, The Gambia and Togo.

18 SAATM member states

have also signed a **Memorandum of Implementation (MoI)** to remove any air service agreement restrictions that are contrary to the Yamoussoukro Decision: **Benin, Burkina Faso, Cabo Verde, Central African Republic, Cote d'Ivoire, Ethiopia, Ghana, Guinea, Liberia, Mali, Mozambique, Niger, Nigeria, Republic of Congo, Rwanda, Sierra Leone, The Gambia and Togo.**

The 31 SAATM States

- Constitute 61% of the AU member States
- Total population is more than 816 million people
- **Account for 70% of the population on the African continent**
- **Combined Gross Domestic Product (GDP) slightly above USD 1,700 billion** in 2018, representing approximately 65% of Africa's GDP

A joined up approach is essential

The SAATM will be more successful when all stakeholders work together to actualise its objectives. There is need to address existing concerns by States and Airlines.

Governments need to work closely with airlines and other aviation stakeholders to formulate, promote or implement policies that support air transport growth.

Civil Aviation Authorities have the responsibility for maintaining minimum interim standards of safety and security as recommended by the International Civil Aviation Organization (ICAO) and in accordance with their national laws.

This will greatly accelerate airline cooperation and collaboration as all parties (particularly passengers) are assured of uniformity across the continent.

The progress made under the SAATM thus far has been as a result of collaboration by various groups of stakeholders. These have been a combination of "Specialised Technical Committees", "Monitoring Bodies" and "Ministerial Working Groups". Without the strong collaboration across these entities, the implementation of the SAATM would not have progressed as much as it has now. **Collaboration works!**

This image shows a full page of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page, typical of notebook paper. There are no margins, text, or other markings on the page.



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