



The SAATM Handbook

2019 Edition



Building the Africa we want...

During the 24th Ordinary Session of the African Union Assembly held in Addis Ababa, Ethiopia, the Heads of State and Government adopted the AU agenda 2063, with twelve flagship projects whose immediate implementation will provide quick wins for creating the Africa We Want.

The Single African Air Transport Market (SAATM) is the first flagship project and it was launched and established on the 28th January 2018, during the 30th Ordinary Session of the AU Assembly held in Addis Ababa, Ethiopia. The SAATM is critical to the African Union’s integration agenda; in particular it is a crucial logistic infrastructure for the successful operation of the Africa Continental Free Trade Area, complemented by the protocol on the Free Movement of People and goods and the African Passport.

The African Union Commission has the mandate to deliver these projects for the benefit of the African Citizenry. The SAATM is expected to enhance air connectivity across the continent, thereby reducing the journey and waiting times for most passengers by more than 20%, induce competition of air services resulting in fare reduction and contribute to the growth of the Tourism industry in Africa and job creations in both sectors.

Currently, twenty-seven countries have subscribed to the solemn commitment towards the establishment of the SAATM. Africa today accounts for under four percent (4%) of the global world aviation traffic but with over a billion persons, the share of African traffic should increase to more than 10% with a fully operational single African air transport market.



Collaboration between all the stakeholders is important in ensuring the successful operation of the Market and the African Union Commission avails itself to working with the industry to fly higher this Agenda 2063 flagship project – The Single African Air Transport Market. The realisation of SAATM is vital to the achievement of the long term vision of an integrated prosperous and peaceful Africa - **the Africa We Want!**

Thank you.

Dr. Amani Abou-Leid,
Commissioner: Infrastructure and Energy

African Civil Aviation Commission (AFCAC), The Executing Agency Of The Yamoussoukro Decision (YD)

The Yamoussoukro Decision on the liberalization of access to air transport markets in Africa was adopted in 1999 by African Ministers of Transport and entered into force in 2000 following its endorsement by Heads of States and Governments of the African Union. It provides for the liberalization of scheduled and non-scheduled air transport services within Africa and aims at removing restrictions on traffic rights, capacity and frequency between city pairs. AFCAC is entrusted with the attribution of the Executing Agency of the YD, to manage, supervise and enforce appropriate rules in the liberalization of African air transport.

To achieve this objective, **AFCAC as the Executing Agency of the YD**, collaborates with State Parties, organs of the African Union, the Regional Economic Communities, Airlines, Industry Associations and other Air Transport Service Providers, guided by the following basic principles:

- a) All air transport activities undertaken on the African continent shall aim at achieving smooth, safe, secure and efficient intra-African travel;
- b) All air transport activities shall be conducted in the interest of the consumer; and
- c) Continental and regional Institutions and State Parties shall encourage active cooperation between eligible airlines and work towards multiple establishment of airlines and other Air Transport Service Providers in different Regional Economic Communities (RECs).



The Monitoring Body (MB) of the YD was established under Article 9 of the YD. It has the following responsibilities at a strategic level in support of the Executing Agency of the YD:

- a) Assist the Ministers responsible for air transport to ensure the full implementation of the YD and realization of the SAATM.
- b) Perform oversight and advisory responsibilities over the functioning of the SAATM and the role of facilitating the smooth operation of the market.

The Single African Air Transport Market (SAATM) was established during the 24th Ordinary Session of the African Union, in Addis Ababa, Ethiopia (30-31 January 2015) by the Assembly of Heads of State and Government, as one of the AU flagship projects of the Agenda 2063, thus placing implementation of the 1999 Yamoussoukro Decision on the Liberalization of Air Transport Market in Africa in the context



of Agenda 2063. SAATM was officially launched on 29 January, 2018 by the 30th Ordinary Summit of the African Union Summit held in Addis Ababa, Ethiopia. The Heads of State and Government also adopted the “Solemn Commitment” made by Champion States on the Establishment of the SAATM.

The realization of the SAATM is vital to the achievement of the long term vision of an integrated, prosperous and peaceful Africa under the AU Agenda 2063. The SAATM will bring about enhanced connectivity across the continent leading to sustainable development of the aviation and tourism industry with immense contribution to economic growth, job creation, prosperity and integration across Africa.

AFCAC is charged with the responsibility of managing air transport liberalization in Africa. This responsibility includes the SAATM, which ensures that aviation assumes its rightful place, role and contributes to intra-African connection. The SAATM underscores Africa’s social, economic, political integration and boosts intra-African trade and tourism as per AU-Agenda 2063.

The Ministerial Working Group of SAATM was established by the African Union Assembly to oversee and guide the implementation of agreed activities and the road map for the establishment of the SAATM. Thus, the main functions of the Ministerial Working Group, translated in detail in its Roadmap, include:

- i. Following up on the SAATM’s implementation progress and providing guidance; and
- ii. Spearheading the advocacy campaign to urge all Member States to join the SAATM.

All readers are encouraged to visit the AFCAC website: www.afcac.org for further details, updates on SAATM and Reference Documents.

Mr. Tefera Mekonnen, Tefera
Secretary General, African Civil Aviation Commission

Achieving the Single African Air Transport Market

The launch of the Single African Air Transport Market (SAATM), which took place in January 2018, is a historic and a vital milestone towards the continental effort to start the implementation of the 1999 Yamoussoukro Decision (YD). The YD provides for the full liberalisation of intra-African air transport services in terms of market access, the free exercise of first, second, third, fourth and fifth freedom traffic rights for passenger and freight air services by eligible airlines.

Initially championed by eleven African States at its launch, the number of States that have signed the solemn commitment has reached thirty one as at November 2019. The SAATM, a flagship project of the African Union Agenda 2063, is an initiative of the African Union to create a single unified air transport market in Africa. The liberalisation of air transport in Africa is an impetus to the Continent's economic integration agenda.

With operationalization of the SAATM, intra-African connectivity will develop and in turn, aviation's role as an economic driver will grow significantly. The SAATM will further spur more opportunities to promote intra-African trade, cross-border investments in the production and service industries, including tourism resulting in the creation of additional jobs.

The benefits of the SAATM will be realised through its effective implementation by the States that have committed and by the remaining States to sign up. As of today, Eighteen Member States of the SAATM have signed the Memorandum of Implementation (MoI) as an outcome of the Ministerial Working Group meeting in May 2018 in Lomé which took place under the Patronage of the SAATM champion, H.E. Faure E. Gnassingbe President of the Togolese Republic.



AFRAA, in collaboration with other stakeholders such as IATA, AU, AFCAC and Regional Economic Communities, is at the forefront of advocacy on the effective implementation of the SAATM. A detailed action plan has been developed that focuses on key pillars to ensure that the industry achieves this major milestone for the prosperity of African aviation.

AFRAA urges the States that have signed up to go a step further to ensure they create an enabling operating environment for airlines so that they may realise the maximum potential of the SAATM and take advantage of the benefits that aviation brings.

Through this handbook, it is our hope that the document will be a beneficial reference point. 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. Abderrahmane Beuthe
AFRAA Secretary General

Africa's time is now...

“It always seems impossible until it is done!”

The Single Africa Air Transport Market (SAATM) has been on the African landscape since the Yamoussoukro Declaration of 1988. Since then, Africa has vigorously debated the feasibility of an air transport market without restrictions or limitations. The real benefit however – a market for the benefit of Africa, its people and its airlines remains on the horizon. The concept of a Single Air Transport market is not a novel one. In other markets, it is now so entrenched that it is no longer a cause for comment. Europe and other major aviation markets have also had to evolve from protected, fragmented and State regulated aviation markets in order to reap the immense benefits they are enjoying today.

These same benefits are also waiting for Africa to enjoy. The power of a fully integrated, competitive and efficiently regulated single air transport market on the African continent is beyond doubt. The IATA/AFCAC/AFRAA economic study conducted by InterVISTAS titled **“Transforming Intra-African Air Connectivity”** provides independent and objective analysis on the economic benefits of implementing the Yamoussoukro Decision amongst 12 States only. African governments would enjoy \$1.3 billion incremental GDP on the continent and at least 155,000 new jobs. Passengers would enjoy 75% increase in direct services, Fare savings of 25-35% and air transport would be available to at least 5 million additional people.

There have been several schools of thought on how the global African aviation landscape moves from what is essentially an administered air transport market to a market based one. For some Stakeholders, the idea of removing all commercial restrictions for African airlines operating within Africa is still



so radical that it must only be done under certain conditions. However, under the strong leadership of the African Union and the African Civil Aviation Commission as well as with the commitment of strong associations like the African Civil Aviation Commission, African Airlines Association, etc we are convinced that Africa's time has come and should be seized without any further delay.

We are therefore pleased to support this summary of the Single Africa Air Transport Market in collaboration with the African Union, African Civil Aviation Commission and the African Airlines Association. We hope you will find it useful as a reference guide and we look forward to working together to make the SAATM fully operational. Please note that the wider industry is also working on a more extensive reference document which will have a lot more information.

Thank you.

Muhammad Ali Albakri

IATA - Regional Vice President Africa & Middle East

Table of Contents

A.	What is the SAATM	7
B.	Why is the SAATM so important?	7
C.	Making the single African Market a reality - what next?	8
D.	What does SAATM mean in practice?	9
E.	How will the SAATM be regulated?	9
F.	Essential pillars for a successful SAATM	10
G.	Implications of SAATM for the growth of African Airlines	10
H.	Industry collaboration for the SAATM	11
I.	SAATM Milestones – January – June, 2018	11
J.	A joined up approach is essential	14
K.	A cautionary tale...	15
L.	APPENDIX 1 - SAATM Prioritized Action Plan	16
M.	APPENDIX 2 - Key Stakeholders	17

SAATM – Transforming lives and economies...

A. What is the SAATM?

The **Single African Air Transport Market (“SAATM”)** will ensure aviation plays a major role in connecting Africa to help support its social, economic and political integration and boost intra-Africa trade and tourism. It is one of the twelve flagship projects of the African Union Agenda 2063. The Single African Air Transport Market was established and launched during the 30th Ordinary Summit of the African Union Assembly of Heads of States and Government held in Addis Ababa, Ethiopia from 28th to 29th of January, 2018.

The Single Market started off from the Yamoussoukro Declaration¹ (adopted in 1988) and the Yamoussoukro Decision² (adopted in 1999). Both of them address the



will of African Heads of State and Governments to liberalize aviation within Africa. The evolution from the Yamoussoukro Decision³ to the Single Africa Air Transport Market is due in large part to the strong leadership of the African Union and the support of the African Civil Aviation Commission.

If African nations and airlines don't fully embrace the Single African Air Transport Market for the benefit of Africa, then the continent, its people and its airlines are unlikely to reach their full potential.

B. Why is the SAATM so important?

Africa is home to over 1.2 billion people with a huge geographical spread that is largely land-locked. Given the lack of robust alternative infrastructure across the continent (road, rail, water), aviation is the most effective way to get around the continent. Unfortunately, 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 African aviation market is perhaps one that has the most potential for growth out of the global regions, due to it being a comparatively young industry and servicing a large and rapidly developing population. Aviation is a vital tool for development globally and has the potential to greatly transform and improve the economic and social benefits across Africa. In Africa, air transport supports 6.2 million jobs

& \$55.8 billion of GDP. Improved intra-Africa connectivity facilitates business and trade, enables tourism, connects friends, families and cultures, and promotes the exchange of knowledge and ideas. Aviation is the foundation of many established and emerging economies e.g. UAE, Singapore, Ethiopia, South Africa, Rwanda, Ghana, Cote D'Ivoire. The SAATM is therefore a clear path for a more prosperous and secure African future.



¹ The Yamoussoukro Declaration 1988

The Yamoussoukro Declaration of October, 1988 was an African Civil Aviation Policy geared towards a comprehensive reform of the air transport industry and the unification of the fragmented African air transport market. However, its primary focus at the time was to promote cooperation and integration between African airlines. It was not until 1999, following the adoption of the Yamoussoukro Decision, that a policy shift from airline integration to the full liberalization of air services in Africa took place.

² The 1999 Yamoussoukro Decision

In 1999, African ministers responsible for civil aviation, under the aegis of the Organization of African Unity (now the African Union), adopted the Yamoussoukro Decision – a multilateral agreement between Africa's 54 countries designed to liberalize the continent's aviation market. The Yamoussoukro Decision is based on the recommendations of the Yamoussoukro Declaration 1988, which aimed at the full integration of the African air transport market.

³ The Yamoussoukro Decision is one of the most significant air transport policy reform initiatives in African aviation history. It was adopted out of the realization that Bilateral Air Services Agreements (BASAs) were too restrictive and hampered the expansion and improvement of air transport on the continent. However, Africa needed to further develop this promising intra-African regulatory regime. The Assembly of the African Union endorsed the Yamoussoukro Decision in 2000 and it became fully binding in 2002 following a two year transition period.]

Africa is home to over 16.75% of the world's people but accounts for between 2 – 4 % of the global air service market.

C. Making the Single African Market a reality - what next?



So far, thirty-one (31) countries are currently subscribed to the SAATM solemn commitment namely: **Benin, Burkina Faso, Botswana, Capo Verde, Cameroon, Central African Republic, Chad, Congo, Congo DR, Côte d’Ivoire, Egypt, Ethiopia, Gabon, Gambia, Ghana, Guinea Conakry, Guinea Bissau, Kenya, Lesotho, Liberia, Mali, Morocco, Mozambique, Niger, Nigeria, Rwanda, Sierra Leone, South Africa, Swaziland, Togo and Zimbabwe.** These countries represent over 80% of the existing aviation market in Africa.

Below are some of the next steps to making the SAATM a reality:

1. Ensuring more States join the SAATM;
2. Ensuring all Member States in the SAATM have:
 - o YD compliant BASAs; or
 - o Removal of any restrictive provisions from existing BASAs in order to fully comply with YD.
3. Harmonization of the national and regional Regulations at the continental level. Ensuring all States in the Market meet the minimum ICAO Safety and Security Standards;
4. Ensuring a Continental Aviation Infrastructure Master Plan is in place including an architecture for the Single African Sky by 2023;
5. Implementation of the Aviation Infrastructure Master plan via the PIDA-PAP 2 platform; and
6. Ensure sufficient resource mobilization particularly to the Executing agency of the YD (AFCAC).

D. What does SAATM mean in practice?

The SAATM will eliminate the need for separate bilateral air service agreements (BASAs) between individual countries. It 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.

Under SAATM, any current or future air service agreement signed between any or all of the thirty-one member States, must be YD compliant and must meet the below requirements:

- Free exercise 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;

Supporting the free exercise of the first, second, third, fourth and fifth Freedoms of the Air, under which an eligible airline or air carrier from one African State can fly into another African State's airspace and land on its territory using only a prior notification procedure.



E. How will the SAATM be regulated?

The Institutional and Regulatory Texts of the Yamoussoukro Decision are essential for the single market to function effectively. At the 30th Ordinary Summit of the African Union Assembly of Heads of States and Government, which took place on 28 January 2018 in Addis Ababa - Ethiopia, the following Regulations were adopted:

1. Competition rules;
2. Consumer protection regulations; and
3. Powers and Functions of the Executing Agency of the YD.

The following Regulations are at various stages of validation and approval: -

1. Dispute settlement procedures;
2. Guidelines for the negotiation of BASAs with third countries;
3. Harmonized regulations for the approval of eligible air carriers and the access of African air carriers to intra-African routes under the Single Air Transport Market;
4. Other operational regulations for the smooth operation of the Market (Enforcement rules);

- Reducing the cost of doing business in Africa (Taxes, User charges and Fees through ensuring Compliance with the Policies of ICAO on User Charges and taxation) – States’ compliance to ICAO policies is essential.

Memorandum of Implementation: - SAATM member States met during the 4th Ministerial Working Group Meeting in Lomé, Togo (May 25 – 28) to address a key measure for the SAATM to operate effectively i.e. the harmonization of all Bilateral Air Services Agreements (BASAs) to ensure the removal of any restrictions that run counter to the Yamoussoukro Decision. The Ministers present committed

to the operationalization of the SAATM via the signing of harmonized Bilateral Air Services Agreements (BASAs) and the adoption of a Memorandum of Implementation (Mol) that ensures the removal of any air service agreement restrictions that are not in compliance with the Yamoussoukro Decision.

Eighteen Member States of the SAATM signed the Mol, including: Benin, Burkina Faso, Cabo Verde, Central African Republic, Congo, Côte d’Ivoire, Ethiopia, Gambia, Ghana, Guinea, Liberia, Mali, Mozambique, Niger, Nigeria, Rwanda, Sierra Leone and Togo.

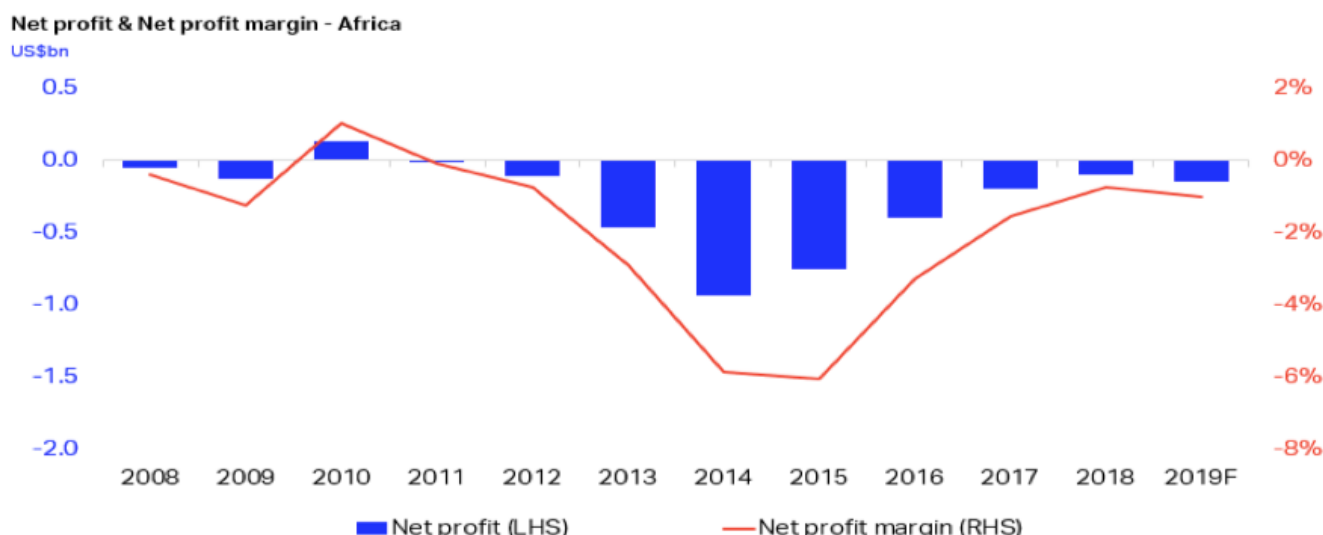
Africa needs to move from the current situation of low choice, high fares and step into a new age of affordable and accessible air transport.

F. 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.)

G. Implications of SAATM for the growth of African Airlines

REGIONAL PROFITABILITY - AFRICA



The African Aviation Industry has struggled to generate consistent profits over the past decade – achieving profit only in 2010. While the African market has much economic potential, there are considerable challenges that need to be addressed on the continent to enable further development. These include high user charges and taxes, inadequate airport infrastructure, an 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.

Airline profitability recently has been strongest in the US and some European airlines. These markets are the most consolidated and these cooperative arrangements have allowed airlines to consolidate passenger flows and achieve economies of density and scale, cutting costs and improving returns. In Africa, markets remain very fragmented and this continues to limit growth. 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.

H. Industry Collaboration for the SAATM

In November 2013, various stakeholders started collaborating in order to progress the establishment of the SAATM. In partnership with the African Civil Aviation Commission (AFCAC) and the African Airlines Association (AFRAA), IATA commissioned an independent 12 country study illustrating the full benefits of establishing a SAATM amongst key states in North, West, South and East Africa; it was launched in July, 2014.

The study, titled “**Transforming Intra - African Air Connectivity: The Economic Benefits of Implementing the Yamoussoukro Decision**”, was conducted by InterVISTAS Consulting Ltd. based on the information available at the time. The results of the study were quite positive in favour of the SAATM and revealed the many benefits that will accrue to 12 African countries if they were to open up their air transport markets to each other⁴.

The collaborative advocacy, conducted by key influential AFI Stakeholders (African Union, AFCAC, IATA, AFRAA, ICAO, NEPAD etc.), has covered over half the African Continent (30+ states) and beyond. As part of activities that will support the



Transforming Intra-African Air Connectivity:

The Economic Benefits of Implementing the Yamoussoukro Decision

operationalization of the SAATM, stakeholders and industry partners are working on the following:

- i. A Value of Aviation Study for 55 countries, which will showcase the economic and social impact of the SAATM across the entire continent;
- ii. An Advocacy and Communication Strategy including the production of advocacy materials such as audio-visual material and country specific/regional leaflets on the VoA study outcomes;
- iii. Capacity Building by AFCAC on the regulatory framework of the SAATM and how to achieve the benefits determined from the study on improving air transport connectivity.

I. SAATM Milestones – January – October, 2019

1. Following the SAATM launch in January, 2018, a stakeholder forum was held in March, 2018 by the African Development Bank on the SAATM. The objective was to define and prioritize actions to be taken by the AU and associated partners⁵, the operationalization



The SAATM Champion – H.E. Faure Gnassingbe, President of Togo and other delegates at the fourth Ministerial Working Group (MWG) on SAATM held between 25th - 28th May, 2018 in Lome, Togo

⁴ These include additional GDP contribution of US\$1.3B, 155,000 new jobs, improved connectivity and shorter travel times. In addition, increased competition will result in between 25-35% fare reduction, which in tend will stimulate an addition 5 million new air passengers. The outcome of the study has been used extensively since 2014 in our advocacy campaigns for improving intra-Africa connectivity, which is currently very low. For instance, only Ethiopia and Kenya have direct flight connections to 28 other more other countries in Africa

⁵ AFCAC, UNECA, REC, AFRAA, UNECA, ICAO, IATA, AfDB, NEPAD, Airlines, Banks, OEMs and States



of the SAATM, funding requirements, including mobilization of resources for the Executing Agency and its capacity building programs, and development of Operational Rules and further advocacy.

2. One of the recommendations was to support the growth and development of the aviation industry in Africa and the need for the African Development Bank to assist African airlines increase intra-Africa traffic and improve connectivity in order to be more competitive and profitable.
3. In March 2018, the African Union Commission established a concrete Action Plan in collaboration with its specialized Agencies and Partners, with the aim of ensuring the smooth operationalization of the SAATM.
4. Under the patronage of the SAATM Champion H.E. Faure E. Gnassingbe, President of the Togolese Republic, the fourth Ministerial Working Group (MWG) on SAATM held between 25th - 28th May, 2018 on the further operationalization of the SAATM through specific concrete steps.
5. At the end of the Ministerial Working Group Meeting, there was a meeting of Ministers on the 28th of May, 2018 where a Memorandum of Implementation (on the harmonization of BASA provisions in conformity with the YD) was adopted and signed by the Ministers present.
6. Furthermore, States also undertook bilateral consultations on harmonization of their respective Bilateral Air Services Agreements (BASAs) aimed to remove all restrictions that are incompatible with the Yamoussoukro Decision.
7. Second Meeting Of The Civil Aviation Industry Stakeholders Consultation (28-29 January, 2019 – AFCAC Headquarters, Dakar, Senegal) where the 2018 SAATM Prioritized Action Plan was updated for 2019. It was held under the theme “Establishing a Common Platform for all Partners and Stakeholders in Africa’s Civil Aviation”. In attendance, were representatives from eleven partner organizations, namely, African Union Commission (AUC), African Civil Aviation Commission (AFCAC), the African Airline Association (AFRAA), the East African Community (EAC) and Common Market of East and Southern Africa (COMESA), International Air Transport Association (IATA), the European Union, the African Development (AfDB), the World Bank, International Civil Aviation Organization (ICAO) – WACAF and Boeing.
8. 5th Ministerial Working Group (MWG) of SAATM, March 29th, 2019, Cabo Verde, Sal
9. Advanced Mission of the World Bank on its contribution to the sustainable development of air transport and the Executing Agency in 2019
10. Two rounds of discussion with the AfDB and signing of an Aide-mémoire with a financial pledge to the Executing Agency (EA) of the YD in 2019
11. AUC/EU/AFCAC two rounds of discussion on capacity building programs in 2019
 - Africa-Europe Alliance - Transport/Connectivity Task Force - Aviation Cluster (meeting on 24 January 2019), Brussels, Belgium
 - EU-Africa Alliance Final Meeting of the Transport Task Force, 25 July 2019, Brussels, Belgium
12. AFCAC Capacity Building Workshops:
 - A Continental Capacity-building workshop on the Institutional and Regulatory Instruments of the Yamoussoukro Decision (YD) was organized by the

African Union (AU) in conjunction with the African Civil Aviation Commission (AFCAC) and sponsored by the World Bank in Addis Ababa, Ethiopia from 18th – 20th February, 2019.

- First RECs Capacity Building Workshop on the Yamoussoukro Decision (YD) Institutional and Regulatory Texts jointly organized by the AU and AFCAC and hosted by the Rwanda Civil Aviation Authority was held in Kigali, Rwanda from 22nd – 24th July 2019 for member States of COMESA, EAC, IGAD and SADC Regions.
- Second Regional Capacity Building Workshop on the Yamoussoukro Decision (YD) Institutional and Regulatory Texts hosted by the Government of the Republic of Niger from 25 – 27 November 2019

in Niamey, Niger for member states of Northern, Western and Central African Regions, ECCAS, ECOWAS & AMU.

- Capacity Building Workshop on the Yamoussoukro Decision (YD) Regulatory Texts.
13. English and French versions of the regulatory texts have been published and are being disseminated electronically and in hard copies;
 14. The African Union Commission has recruited a consultant to elaborate on the Dispute Settlement Mechanism.



• The AUC team lead by the Commissioner of Infrastructure of AUC also met H.E, President of TOGO with the team of AFCAC to discuss issues related to the Status of implementation of the SAATM.



• The DG of ASECNA, Mr. Mohamed MOUSSA formally handed over the keys of the offices allocated to the Executing Agency of the YD to the SG of AFCAC during at a brief ceremony held at the premises of the building. Both the DG and SG agreed to work together for the benefit of Civil Aviation in Africa.



• The Minister of Nigeria (left) and the Minister of Burkina (right) signing the Memorandum of Implementation



J. A joined up approach is essential...

The SAATM will be more successful when all stakeholders work together to actualize its objectives. 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. African Airlines have a major role to play. SAATM will be able to deliver on its promise if airlines actually cooperate with one another and maximize their opportunities.

The diagram is an example of a joined up collaborative approach under the SAATM.

<p>MINISTRY OF TRANSPORT</p> <ul style="list-style-type: none"> Regulatory policy on liberalization. Ensure YD Compliant BASAs are negotiated/ re-negotiated. Leadership on an integrated transportation strategy. Harmonization of National Policy with AFCAP Optimization of Celebration of the YD day to engage all stakeholders to embrace the SAATM, as a Pilot project of Agenda 2063 	<p>TOURISM BOARD</p> <ul style="list-style-type: none"> Define a role promoting, supporting and monitoring the implementation of the air transport growth strategy and the air service development strategy. Maximize SAATM benefits via a holistic strategy. The tourism value chain and the rest of the aviation industry to collaborate. 	<p>MINISTRY OF FINANCE</p> <ul style="list-style-type: none"> Address the proliferation of taxes, charges or fees that hinder air traffic growth and impede aviation's sustainable development. Allocation of resources to support aviation finance requirements (e.g. infrastructure development) and other key industry activities.
<p>CIVIL AVIATION AUTHORITY</p> <ul style="list-style-type: none"> Maintain minimum safety and security requirements. Regulatory and Policy harmonization. Support industry human capacity development. 	<p>AIRPORT AUTHORITY</p> <ul style="list-style-type: none"> Infrastructure development. Reduced user charges. Support an integrated transportation strategy. 	<p>MINISTRY OF NATIONAL PLANNING</p> <ul style="list-style-type: none"> Sufficient budgetary allocations for aviation industry activities Work with the Transport Ministry on the coordination of non-traditional aviation stakeholders to support.
<p>DOMESTIC AND INTERANTIONAL CARRIERS</p> <ul style="list-style-type: none"> Plan for progressive implementation of the SAATM. Work with Tourism Board on tourism development. Contribute and commit to industry working groups. Proactive in seeking solutions to impediments to growth. 		<p>Strategic Alignment with several key sectors, including:</p> <ul style="list-style-type: none"> Customs, Immigration Agriculture, Manufacturing. Health, Education. Sports, etc.

Unlocking commercial opportunities for African Airlines: African Airlines are not only competitors. Under the Single African Air Transport Market, airlines can be partners and cooperate to optimize the numerous opportunities under the SAATM.

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 “Specialized Technical Committees”, “Monitoring Bodies” and “Ministerial Working Groups”.

Such Stakeholders include the African Union Commission (AUC), African Civil Aviation Commission (AFCAC), the United Nation Economic Commission for Africa (UNECA), and the African Airlines Association (AFRAA), International Air Transport Association (IATA), the Regional Economic Communities (RECs), African Ministers responsible for Civil Aviation, NEPAD Strategic Partners, Financial Institutions, and many more. Without the strong collaboration across these entities, the implementation of the SAATM would not have progressed as much as it has now. Collaboration works!





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.

K. A cautionary tale...

Africa's much talked about under-served status can be attributed to the protection of air service markets held by certain airlines (mainly state-owned air carriers) via certain restrictions. The practice is a relic from an era where many African states operated national airlines. The effect of protectionism today is more detrimental as air fares remain high, thereby dampening air traffic growth.

One significant benefit for States when they choose to abandon State protectionist policies and allow competition is lower transport costs, due to increased players and competition. The effect of this is increased trade and tourism. Furthermore, making travel cheaper greatly enhances the travel and tourism potential of States, along with the substantial catalytic effects.

Promoting regional transnational competition via the free exercise of first to fifth freedom rights for passenger and freight air services by eligible airlines is the way forward to grow Intra-African air transport.



The goal of the SAATM is to strengthen Safety and Security oversight of Member States across on the continent in order to ensure sustainable development of air transport and and promote a climate of cooperation among African carriers through partnerships, mergers and consortiums. The full implementation of SAATM will guarantee the creation of a larger market for African carriers and an improved access to capital.

APPENDIX 1

L. SAATM Joint Prioritized Action Plan

Pillar 1: Advocacy for the effective implementation of the SAATM

- Develop and implement effective advocacy and communication strategies
- More states to subscribe to the SAATM by 2019
- SAATM Member States to implement SAATM “concrete measures”

Pillar 2: Enhancing the SAATM Regulatory Text – harmonisation and domestication of existing text

- Ensure availability of appropriate regulations for the oversight of the SAATM
- Member States and RECs are sensitized on the YD Texts

Pillar 3: Operationalization of the SAATM – focus on operationalization of the EA

- Facilitate the execution of a continent-wide study on benefits of aviation to Africa’s socio-economic landscape and audio-visual material
- Capacity strengthening of implementing entities
- Facilitate Airline cooperation and adoption of SAATM Harmonization of policies on aeronautical related taxes and charges and other non-tariff barriers
- Monitoring and Evaluation of the SAATM

Pillar 4: Planning for future growth: SAATM Infrastructure

- Planning for future traffic growth
- Single African Sky Architecture is established

Pillar 5: Enhancing Safety and Security – ensuring all countries attain the minimum standard (at least 60% EI)

- All SAATM countries meet the Abuja safety targets
- Windhoek security and facilitation targets implemented
- Improve continental safety oversight
- All airlines meeting minimum safety standards

Pillar 6: Financing the aviation industry

- Access to sustainable Funding


APPENDIX 2

M. Key Stakeholders

1. **SAATM Member States** - Thirty-one countries are currently subscribed to the solemn commitment namely: **Benin, Burkina Faso, Botswana, Capo Verde, Cameroon, Central African Republic, Chad, Congo, Congo DR, Côte d'Ivoire, Egypt, Ethiopia, Gabon, Gambia, Ghana, Guinea Conakry, Guinea Bissau, Kenya, Lesotho, Liberia, Mali, Morocco, Mozambique, Niger, Nigeria, Rwanda, Sierra Leone, South Africa, Swaziland, Togo and Zimbabwe.**

2.  **The African Union Commission (AUC):**
Website - <http://www.au.int/en/commission>
The African Union, or AU, is a pan-African organization with the overall objective of a united, peaceful and prosperous African continent. It supports political and economic integration among its 55 member nations. The AU has overall responsibility for formulating policies for the aviation industry in Africa and the AU Assembly, made up of all the Heads-of-State or Government of Member States, is the highest decision-making organ of the AU.

3.  **The African Civil Aviation Commission (AFCAC):**
Website - www.afcac.org/
The Yamoussoukro Decision provided for the creation of the African Air Transport Executing Agency, with responsibilities to supervise and manage the African liberalized air transport industry. The Executing Agency was established during the third AU Conference of Ministers responsible for Air Transport, held in Addis Ababa, Ethiopia, in May 2007, entrusting its functions to the African Civil Aviation Commission (EX.CL/Dec/359 (XI)).

4.  **The African Airlines Association (AFRAA):**
Website - <http://www.afraa.org/>
AFRAA is a Trade Organisation open to membership of airlines of African States. There are currently forty members from African Union member States. It has been in the forefront of major initiatives in the air transport field in Africa in sensitizing African airlines to take concrete actions for co-operation in operational, commercial, technical, and training fields and has been a catalyst for all the major policy decisions in the Continent.

5.  **The United Nations Economic Commission for Africa (UNECA):**
Website - <https://www.uneca.org/>
Made up of 55 member States, it has the mandate of the AU to chair the Monitoring Body of the YD. It also plays a dual role as a regional arm of the UN and as a key component of the African institutional landscape. UNECA is well positioned to make unique contributions to address the Continent's development challenges. UNECA's strength derives from its role as the only UN agency mandated to operate at the regional and sub regional levels to harness resources and bring them to bear on Africa's priorities.

6. **The Regional Economic Communities (RECs):**
For more info - <https://au.int/en/organs/recs>
The RECs are regional groupings of African states. The RECs have developed individually and have differing roles and structures. Generally, the purpose of the RECs is to facilitate regional economic integration between members of the individual regions and through the wider African Economic Community (AEC). The Regional Economic Communities facilitate and coordinate the implementation of the SAATM within their Member States. In this regard, the Regional

Economic Communities have agreed and signed a memorandum of cooperation on the operationalization of the SAATM.

Currently, there are eight RECs recognized by the AU, each established under a separate regional treaty. These are:

- Arab Maghreb Union (UMA)
- Common Market for Eastern and Southern Africa (COMESA)
- Community of Sahel-Saharan States (CEN-SAD)
- East African Community (EAC)
- Economic Community of Central African States (ECCAS)
- Economic Community of West African States (ECOWAS)
- Intergovernmental Authority on Development (IGAD)
- Southern African Development Community (SADC).

7.  **The NEPAD Planning and Coordinating Agency (NEPAD Agency):**
Website - <http://www.nepad.org/>
The NEPAD Agency was established in 2010 as an outcome of the integration of NEPAD into AU structures and processes. One of their key projects is the Programme for Infrastructure Development in Africa (PIDA). It was developed by the African Union Commission (AUC), NEPAD Agency, African Development Bank (AfDB), United Nations Economic United Nations Commission for Africa (UNECA) and the Regional Economic Communities.

PIDA's aim is to promote regional economic integration through building mutually beneficial infrastructure, strengthening the abilities of countries to trade and establishing regional value chains for increased competitiveness. Accelerated infrastructure development on the continent is crucial to achieving the objectives of the SAATM.

8.  **International Civil Aviation Organization (ICAO):** **Website - <https://www.icao.int>**
ICAO is a UN specialized agency, established by States in 1944 to manage the administration and governance of the Convention on International Civil Aviation (Chicago Convention). Amongst other key functions, ICAO provides support to States in Africa, and around the world, through its **No Country Left Behind** initiative, the Global Plans it sets out for Aviation Safety, Air Navigation Capacity and Efficiency, and most recently Aviation Security.

9.  **The International Air Transport Association (IATA) website - <http://www.iata.org>**
IATA is the trade association for the world's airlines, representing some 290 airlines or 82% of total global air traffic. IATA supports all areas of aviation activity through advocacy, standards and services, and contributes to the formulation of industry policy on critical aviation issues. IATA has been a key promoter of the growth and development of African aviation, supported by a team of African aviation professionals across the continent. IATA has supported the implementation of the YD and the Single African Air Transport Market through collaboration with AFCAC and other stakeholders, in particular since 2014 through its 12 country economic study till date. From its dedicated team in the African region, IATA continues to provide strong support for the full implementation of the SAATM through advocacy, data, information, communication, materials and capacity building for airlines and other partners.



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