"Better Skies for Africa"

AFRAA Position Paper- Liberalisation of the African Skies

Introduction:

The beginning of the liberalization of the African Skies was ushered in by the Yamoussoukro Declaration of 1988, which established the framework for a new African civil aviation policy adopted on 7 October 1988. Its primary objective was to create a conducive environment for the development of both intra-African and international air services.

Subsequently, during the meeting of African Ministers in charge of civil aviation held in Yamoussoukro, Côte d'Ivoire, on 13–14 November 1999, the Declaration became the **Yamoussoukro Decision**. This Decision reaffirms the importance of harmonizing air transport policies to eliminate non-physical barriers that impede the sustainable growth of air transport services in Africa. In doing so, it remains aligned with the guiding principles of the International Civil Aviation Organization (ICAO), which promote the development of safe, regular, and orderly air transport services based on equality among States. Such an environment facilitates the free movement of persons, goods, and services across the continent.

In practical terms, the Yamoussoukro Decision aspires to support the progressive establishment of a liberalized intra-African aviation market, addressing key areas including traffic rights, capacity, frequency, and pricing. It also emphasizes the importance of strengthening cooperation among African airlines to stimulate inter-African air transport growth and enhance the quality of service delivered to consumers.

'Open Skies', as liberalization is often called, gained momentum in different regions such as the USA, the EU, and Asia at different times and it was opportune for Africa to find its solution for the same phenomenon.

AFRAA has evaluated the various studies on the benefits of liberalization and concluded that they outweigh the challenges as has been demonstrated in other regions of the world.

Understanding liberalization

There have been many initiatives undertaken by various entities to ensure that Africa achieves liberalization of access to air transport markets in line with what pertains in other regions of the world. However, the realization by the African Union that there is a need for a concerted effort to unify all the initiatives to realise the open skies is significant in many ways. Africa is not alone in its quest for liberalization as can be seen from the open skies regimes that have been established in other regions of the world.

Africa does not lack demand for air transport. Africa currently accounts for about 2.1% of global air traffic and 2% of world cargo share, despite our population size, geographic scale, and growing trade ambitions. Yet the long-term outlook is clear: African air traffic is projected to grow by approximately 4% per year between 2018 and 2050.

The policy question for Member States is not *whether* Africa will grow, but who will capture that growth—African carriers and economies, or external competitors.

As per AFRAA data in Q1 2026**,**

- In international markets (regional and intercontinental), non-African airlines carry 50.8% of traffic, compared with 49.2% for African Airlines.
- In the intercontinental market, non-African airlines carry 67.1% of traffic, compared with 32.9% for African Airlines.

Africa continue to face gaps between commitment and implementation.

Liberalisation under the Yamoussoukro Decision and SAATM must be treated as an economic competitiveness strategy, not merely an aviation policy commitment.

Currently, 3rd and 4th Freedoms account for 78% of connectivity capacity while 5th Freedom accounts for only 22%.

SAATM is not about "opening skies" blindly—it is about building a competitive African aviation ecosystem.

When implementation is delayed, the cost is paid by airlines, passengers, and ultimately by African economies.

The Yamoussoukro Decision, which in effect is the ultimate liberalization of the African Skies, when fully implemented brings significant benefits to African airlines such as but not limited to the following:

- Unrestricted designation of airlines for routes
- Capacity and frequency are not limited
- Safety and security are non-negotiable
- Rights are granted from 3rd to 6th freedom where required
- Flexibility in routing and allocation of gauge to meet demand
- Cargo gets opportunity for 7th freedom operations
- Charter operations are handled on a need basis without restrictive policies
- Airlines can pursue code-share and other commercial agreements
- User charges are transparent and service providers compete fairly for business
- Provision for fair competition and consumer protection

For African airlines, beyond the policy debate, SAATM is an operational requirement. It affects airlines' ability to open routes, plan networks with confidence, exercise traffic rights predictably, and offer affordable air travel to African citizens.

Without effective market access, Africa will continue to generate demand but lose value, including jobs, connectivity, and foreign exchange.

Single African Air Transport Market

The AU’s Agenda 2063 identified the full implementation of the Yamoussoukro Decision in order to create the Single African Air Transport Market (SAATM) as one its flagship projects. Since the launch of the SAATM in January 2018, 38 AU member states have signed their solemn commitment, 21 countries have submitted their Memorundum of implementation, and 8 countries have implemented the concrete measures as of 2025 .

The implementation of the YD under the SAATM consolidates the multi-faceted benefits that have been well documented in numerous studies. The benefits to the consumer include the following:

- Increased frequencies and capacity
- Lower fares due to competition
- Wider choice of destinations
- Increased intra-Africa mobility for their goods and services
- Access to all African markets for enhanced trading

The pillars of the stakeholders prioritized action plan for the SAATM implementation are as follows:

1. Continuous improvement in Safety and Security

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

3. Regulatory & policy harmonization.

4. Optimized infrastructure and establishment of a seamless Airspace Architecture.

5. Ease of intra-African mobility (Visas/customs)

6. Reduced taxes and charges (Competitiveness)

7. Strengthening the capacity of implementing agencies and Member States

8. Human capacity development (Skills and personnel pipeline)

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

AFRAA approach

The SAATM KPI framework provides clarity and objectivity through a set of measurable airline-related indicators designed to assess the readiness and compliance of designated African eligible airlines operating within SAATM. These indicators focus on the alignment of airline policies, procedures, and operational capabilities with the principles and regulatory instruments of the Yamoussoukro Decision.

In this regard, the framework evaluates the following key performance indicators:

KPI-11: The designated African eligible airline has an approved policy and procedures to comply with State regulations that incorporate the Yamoussoukro Decision and its institutional and regulatory instruments as the basis for operating scheduled and non-scheduled intra-African air transport services.

KPI-12: The designated African eligible airline has an approved policy and procedures to comply with State Parties' competition obligations when operating scheduled and non-scheduled intra-African air transport services.

KPI-13: The designated African eligible airline has approved policy and procedures to comply with State Parties' consumer protection obligations when operating scheduled and non-scheduled intra-African air transport services.

KPI-14: The designated African eligible airline is able to operate scheduled and/or unscheduled intra-African air transport services within a liberalised SAATM environment.

KPI-14.1: The designated African eligible airline is able to operate all logical 5th freedom rights of the air on routes or sectors within the liberalised SAATM, from the territories of States served within its route network.

KPI-15: The designated African eligible airline operating scheduled and/or unscheduled intra-African air transport services within a liberalised SAATM has a policy and procedures to fully comply with the provisions of Annex 6 of the Yamoussoukro Decision concerning regulations on the protection of consumers.

The SAATM KPI audits provide the evidence required to assess compliance and readiness. However, evidence alone does not transform markets. Market change occurs when audit findings are translated into clear corrective actions and when progress is monitored and tracked consistently over time. This continuous improvement process represents the real value of the KPI framework.

Ultimately, successful liberalisation requires alignment between States and airlines. Regulations must be transparent, predictable, and consistently applied by States. At the same time, airlines must operate safely, responsibly, and competitively within that regulatory framework. Such mutual alignment is essential for ensuring that the objectives of SAATM and the Yamoussoukro Decision are effectively realised across the continent.

AFRAA suggests a three-pillar approach for the SAATM implementation:

Pillar 1: Regional Integration
Liberalisation enables the states to integrate their socio economic activities in such a way that they are able to achieve more by harnessing the economies of scale brought about by their combined complementarity. The regions are able to make full use of their financial resources in developing the required infrastructure be it airports, navigation, or intermodal transport facilities.

State implementation priorities:

- align REC aviation strategies with SAATM objectives
- coordinate infrastructure investment planning across borders

Pillar 2: Free movement of people and goods
The AU's Agenda 2063 stipulates the objective of enabling the people of Africa to be able to move freely across borders to enhance trade and integration. AFRAA's Route Network Coordination committee continues to enhance the collaboration of airlines so that they are able to connect more destinations through their efforts.

State implementation priorities:

- support visa openness and passenger facilitation,
- remove border friction that discourages travel,
- align aviation facilitation measures with AU Protocol on Free Movement of Persons.

Pillar 3: Collaborative approach with AfCFTA
The prospects brought by the AfCFTA (African Continental Free Trade Agreement) are significant in terms of enabling intra-Africa trade. AFRAA supports the initiative and our Route Network Coordination & Cargo Committee is geared to enhance the transportation of goods and services across the regions.

State implementation priorities:

- integrate SAATM implementation into AfCFTA national strategies,
- treat air connectivity as a trade-enabling instrument.

Conclusion:

With the increased and accelerated signing of the solemn commitment by more African Union Member States, AFRAA advocates for a practical review of what has already been implemented and what remains outstanding. Such a review should focus on identifying constructive, workable solutions that reflect the realities of the African aviation operating environment. AFRAA also underscores the importance of peer learning across the continent. The experience of the Banjul Accord Group through the Banjul Accord Group Multilateral Air Service Agreement demonstrates that regional liberalisation can deliver tangible results when implementation is pragmatic, cooperative, and sustained. These experiences offer valuable lessons for SAATM, and AFRAA encourages open and continuous exchange of such insights.

AFRAA's reaffirms its commitment to:

- Supporting the implementation of SAATM;
- Facilitating structured dialogue between States and airlines to ensure that policy and regulatory decisions reflect operational realities;
- Providing operational and market data to support informed and evidence-based policy making; and
- Advocating for a balanced regulatory environment that promotes connectivity, fair competition and sustainability.

In line with the directives of its Executive Committee, AFRAA remains committed to working with stakeholders, mainly AFCAC, AfCFTA, the AUC, RECs, ECA, IATA and ACI-Africa. This collaboration seeks to ensure that SAATM commitments are translated into real, visible, and lasting benefits for African aviation and the broader African economy, while also addressing the concerns of AFRAA member airlines.

African Airlines are therefore encouraged to actively participate in AFRAA initiatives such as Capacity Building Workshops on SAATM for Airlines, which provide problem solving platforms. Through these fora, concerns and operational experiences of airlines can be collated and presented to the appropriate stakeholders with a view to unlocking meaningful connectivity gains. At the same time, AFRAA and its partner stakeholders continue to encourage African airlines to implement the YD in line with the SAATM.

African Airlines Association (AFRAA) | P.O. Box 20116 Nairobi 00200 - Kenya
+254 20 23 20 144
+254 20 23 20 148
Email: afraa@afraa.org