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Faculteit Bedrijfseconomische Wetenschappen

master in de handelswetenschappen

Masterthesis

To investigate the key challenges, implications and opportunities in the implementation of a Single African Air Transport Market (SAATM)

Brecht Beirnaert

Scriptie ingediend tot het behalen van de graad van master in de handelswetenschappen, afstudeerrichting supply chain management

PROMOTOR :

dr. Sumit MAHARJAN

BEGELEIDER :

De heer Francis MWANGI



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Preface

This master's thesis delves into the exploration of 'Key Challenges, Implications, and Opportunities in the Implementation of a Single African Air Transport Market (SAATM)'. This work represents the culmination of my academic journey in the field of Supply Chain Management at the University of Hasselt.

The significance of the SAATM in fostering regional integration, economic growth, and sustainable development inspired me to explore this subject in depth. This thesis aimed to contribute to a better understanding and advancement of knowledge in this crucial area. Although this topic was initially outside my usual scope, my curiosity drove me to expand my knowledge. Africa, as a continent rich with untapped opportunities, holds immense potential, and I felt compelled to explore its vast possibilities.

I would like to extend my deepest gratitude to my supervisor, Francis Mwangi, whose guidance and expertise have been invaluable throughout this process. His support and encouragement kept me motivated and focused. I am also grateful to my promotor, Dr. Sumit Maharjan, for his insightful feedback and constructive criticism, which have greatly improved the quality of this work.

This research would not have been possible without the support of the University of Hasselt, which provided the essential resources and academic environment. I also wish to express my sincere gratitude to the respondents of my questionnaire, whose participation was invaluable to the success of this study.

On a personal note, I am deeply thankful to my family and friends for their continuous support and understanding, especially during the most demanding times of my research.

I hope this work will contribute to the ongoing dialogue surrounding the implementation of SAATM and inspire further research and inquiry. The process has been an invaluable learning experience, and I am excited to share the outcomes with the academic community.

Summary

Africa's economic situation is characterized by a growing population and significant potential for global influence, yet it continues to struggle with a low GDP per capita compared to other continents. To address these challenges and unlock Africa's economic potential, the African Union developed Agenda 2063, a comprehensive strategy for the continent's growth and development. Within this framework, the Single African Air Transport Market (SAATM) stands as a flagship initiative aimed at improving connectivity, reducing trade barriers, and stimulating economic growth across Africa.

This study combines insights from a literature review with findings from a descriptive survey of key stakeholders in civil aviation and airline operations. The survey was designed to gather detailed insights from various stakeholders, covering the initiative's implications, challenges, and opportunities. By targeting specific entities and individuals within the African aviation sector, the questionnaire aimed to capture a broad range of perspectives and expert opinions essential for the research study.

The specific research questions addressed in the study were:

1. What are the primary challenges hindering the establishment of an efficient SAATM in Africa?
2. What are the potential implications, both positive and negative, associated with the realization of the SAATM?
3. What future opportunities may emerge during the implementation of the SAATM that could benefit the African continent and its aviation industry?

The origins of the SAATM lie in the 1988 Yamoussoukro Declaration, which was enforced by the 1999 Yamoussoukro Decision. However, the implementation of this decision was less successful than anticipated, as confirmed by survey respondents, with almost all respondents rating progress as medium or lower. To accelerate the YD, the African Union declared the creation of the SAATM in 2015. The official launch and commitment of 23 states to implement the SAATM took place in 2018. To date, 37 out of 55 African countries have signed the SAATM, accounting for 80 percent of the existing aviation market in Africa. It is crucial that each country actively participates to unlock the numerous benefits of the SAATM for the whole of continent.

The literature review revealed several challenges impeding the seamless implementation of the SAATM, that included: regulatory barriers, infrastructure constraints, and political obstacles. There is a need for harmonized regulatory frameworks, YD compliance, and overcoming operational hurdles such as visa restrictions and high taxes. Another key aspect of SAATM integration is BASA compliance. The liberalization of these BASAs is expected to bring a variety of benefits, including better market access, greater connectivity, more competition, and ultimately lower passenger fares. The liberalization of BASAs is estimated to create an additional 588,750 jobs and contribute an additional US\$4.0 billion annually to GDP of African Union countries.

The research aimed to gather insights on SAATM from delegates that are active in the aviation industry. Ultimately, 36 stakeholders (respondents) from 17 different countries within the continent responded to the survey, exceeding the predetermined sample of 16 nations. Respondents highlighted the presence of bureaucratic hurdles, economic volatility and differences in regulations

between African countries as major challenges delaying SAATM implementation. The majority of respondents also indicated that affordability and accessibility of air travel is a concern. This issue is strongly influenced by higher air fares, high taxes, corruption and inadequate infrastructure, putting pressure on the capacities of airlines and aviation authorities. Full engagement of stakeholders - including governments, airlines, passengers and regulators - is essential to effectively address the identified challenges.

Full implementation of the SAATM would bring numerous benefits. It will boost socio-economic development and regional integration, in line with the broader goals of sustainable development and unity of the continent. SAATM is expected to promote regional integration and trade, which is one of the most critical benefits according to survey respondents, as 97.2 percent cited it as a key impact area. Another key impact of SAATM is its influence on economic growth and job creation, with 94.4 percent of respondents citing it as a key benefit. Moreover, stakeholders believe SAATM will promote social and cultural exchanges, boost tourism development and encourage innovation and technology transfer within the aviation sector.

The existing research on the subject provided a list of strategic recommendations to address these challenges. These include efforts to achieve uniform security measures, investment in infrastructure, tax reform, streamlined procedures, policy prioritization, multilateral solutions and combating protectionism.

Both the literature review and the survey results indicate that regulatory harmonization should be prioritized when implementing the SAATM to create a consistent and predictable working environment. This measure includes aligning safety, security and operational standards. There is also a need for capacity-building initiatives to prepare member states through training programs. Moreover, there is a need for better awareness and promotion campaigns to clearly communicate the economic and social benefits of SAATM. The results show that there is still room for improving knowledge and engagement to achieve wider awareness.

There is a strong need for funding and investment in infrastructure to support implementation, especially in less developed regions. Furthermore, it is important to raise awareness among members about the benefits of SAATM. Engaging political leaders and fostering diplomatic efforts will be key to securing broader commitments from member states.

The study provides an holistic understanding of the complexities involved in establishing a unified air transport market across Africa. The findings of this research will not only contribute to the body of knowledge on aviation economics and policy but will also serve as a valuable resource for technical experts and policymakers involved in the implementation of SAATM. The study report provides stakeholders with evidence-based recommendations. This gives them the necessary understanding to effectively manage the complexities of SAATM implementation.

Moreover, the study's emphasis on informing both national and international decision-making processes underscores its broader impact on air transport development. By generating policy recommendations that promote equity and sustainability, the research plays a crucial role in shaping the future of air transport in Africa. Ultimately, by facilitating informed decision-making and fostering collaboration among stakeholders, this study will contribute to the realization of SAATM's overarching

goals of enhancing connectivity, promoting economic growth, and advancing regional integration across the African continent.

Finally, while conducting this research, I encountered a couple of limitations. Primarily, I recognized my lack of familiarity with broader African cultures, politics and aviation. I had never heard about this initiative before and was not educated in the field of African aviation at all. However, that was the stimulus for me to apply for this topic. Initially, I was attracted by this subject as an opportunity to explore an unknown field and learn about potential developments in Africa over the coming decades. This master's thesis offered me a great way to expand my knowledge in the field of supply chain management and gain expertise in an essential aspect of transportation, namely aviation. Through the research, I have broadened my perspective on the African economy and the transportation sector as a whole. I explored an entirely new area and gathered invaluable information about the complexity of aviation and its strong links with societal and economic realities.

Table of contents

Preface	i
Summary	ii
List of Abbreviations	vii
List of Figures.....	viii
1 CHAPTER 1: Background.....	1
1.1 Introduction.....	1
1.2 Statement of the problem.....	1
1.3 Research question	2
1.4 Objectives	2
1.5 Specific objectives	2
1.6 Significance of the study	2
1.7 Scope of the study.....	3
2 CHAPTER 2: Literature review	5
2.1 Introduction.....	5
2.2 Theoretical framework.....	5
2.2.1 Multilateral regulation	5
2.2.2 Freedoms of the air	5
2.2.3 Yamoussoukro Declaration (YD)	6
2.2.4 The Single African Air Transport Market (SAATM).....	6
2.2.5 Memorandum of Implementation (MoI).....	7
2.2.6 African Union Commission (AUC).....	8
2.2.7 African Civil Aviation Commission (AFCAC)	8
2.2.8 African Airlines Association (AFRAA)	8
2.2.9 International Air Transport Association (IATA)	8
2.2.10 International Civil Aviation Organization (ICAO)	8
2.3 Theory	9
2.3.1 Challenges	9
2.3.2 Implications.....	10
2.3.3 Future opportunities	11
2.4 Empirical literature	13
2.4.1 Africa Visa Openness Index	13
2.4.2 Evolution since 2021.....	14

2.5	Conclusion	15
3	CHAPTER 3: Research Methodology	17
3.1	Introduction	17
3.2	Research design	17
3.3	Target population and sample selection	17
3.4	Data collection tools.....	18
3.5	Data analysis	18
4	CHAPTER 4: Data analysis, presentation and interpretation	19
4.1	Analysis	19
4.1.1	Respondent profile	19
4.1.2	Rating of general awareness of SAATM	20
4.2	Factors hindering the full implementation of the SAATM.....	23
4.2.1	Main challenges	23
4.2.2	Regulatory harmonization across Africa	24
4.2.3	Rating of major operational challenges.....	26
4.2.4	Rating of the primary hindrance to BASA compliance	28
4.2.5	Rating of the impact of higher airfares	29
4.3	Factors contributing to a favorable environment for SAATM implementation	33
4.3.1	Connectivity and integration across Africa	33
4.3.2	Regional connectivity and integration	35
4.3.3	Economic growth and prosperity	38
4.3.4	Implications for sustainable development	40
4.3.5	Unintended consequences	42
4.4	Opportunities that may arise from full SAATM implementation.....	44
4.4.1	Strategies to encourage full participation.....	44
4.4.2	Addressing policy impediments	46
4.4.3	Progress uniform implementation of SAATM	48
4.4.4	Progress implementation of Yamoussoukro Declaration (YD)	50
4.4.5	Most important opportunity from SAATM	53
5	Chapter 5: Conclusion.....	55
6	Chapter 6: Bibliography	57
7	Chapter 7: Appendix	61

List of Abbreviations

AFCAC: African Civil Aviation Commission

Afcfta : African Continental Free Trade Area

AFRAA: African Airlines Association

AU: African Union

AUC: African Union Commission

AVOI : Africa Visa Openness Index

BASA: Bilateral Air Services Agreements

ECOWAS: Economic Community of West African States

GDP : Gross Domestic Product

IATA: International Air Transport Association

ICAO: International Civil Aviation Organization

LCC: low-cost carriers

MoI: Memorandum of Implementation

REC: Regional Economic Community

SAATM: Single African Air Transport Market

SADC: Southern African Development Community

SDG: Sustainable Development Goals

UN: United Nations

VOI: Visa Openness Index

WAEMU: West African Economic and Monetary Union

YD: Yamoussoukro Decision

List of Figures

Figure 1: Development of the SAATM

Figure 2: Respondents' nationalities distribution

Figure 3: Distribution of respondents by age group

Figure 4: Awareness level (in %) of SAATM

Figure 5: Perceived awareness level by region

Figure 6: Perceived awareness level by age

Figure 7: Perceived awareness level by GDP group

Figure 8: Impact of regulatory harmonization challenges on SAATM implementation

Figure 9: Impact of regulatory harmonization challenges on SAATM implementation by region

Figure 10: Impact of regulatory harmonization challenges on SAATM implementation by age

Figure 11: Impact of regulatory harmonization challenges on SAATM implementation by GDP group

Figure 12: Major operational challenges to SAATM implementation

Figure 13: Primary hindrance to BASA compliance in SAATM implementation

Figure 14: Impact of higher airfares on SAATM implementation

Figure 15: Impact of higher airfares on SAATM implementation by region

Figure 16: Impact of higher airfares on SAATM implementation by age

Figure 17: Impact of higher airfares on SAATM implementation by GDP group

Figure 18: SAATM's impact on integration and connectivity across Africa

Figure 19: SAATM's impact on integration and connectivity across Africa by region

Figure 20: SAATM's impact on integration and connectivity across Africa by age

Figure 21: SAATM's impact on integration and connectivity across Africa by GDP group

Figure 22: SAATM's impact on regional integration and connectivity in Africa

Figure 23: SAATM's impact on regional integration and connectivity in Africa by region

Figure 24: SAATM's impact on regional integration and connectivity in Africa by age

Figure 25: SAATM's impact on regional integration and connectivity in Africa by GDP group

Figure 26: Potential positive impact of SAATM on economic growth and prosperity

Figure 27: Potential positive impact of SAATM on economic growth and prosperity by region

Figure 28: Potential positive impact of SAATM on economic growth and prosperity by age

Figure 29: Potential positive impact of SAATM on economic growth and prosperity by GDP group

Figure 30: Implications of SAATM establishment for sustainable development

Figure 31: Progress in achieving uniform implementation of SAATM

Figure 32: Progress in achieving uniform implementation of SAATM by region

Figure 33: Progress in achieving uniform implementation of SAATM by age

Figure 34: Progress in achieving uniform implementation of SAATM by GDP group

Figure 35: Progress in the implementation of the Yamoussoukro Declaration

Figure 36: Progress in the implementation of the Yamoussoukro Declaration by region

Figure 37: Progress in the implementation of the Yamoussoukro Declaration by age

Figure 38: Progress in the implementation of the Yamoussoukro Declaration by GDP group

Figure 39: Most important opportunity offered by SAATM

CHAPTER 1: Background

1.1 Introduction

The economic significance of the Single African Air Transport Market (SAATM) is profound, given Africa's increasing population and its potential to become a global economic powerhouse. With a population exceeding 1.4 billion and a median age of 18.8 years, Africa is poised to have the world's largest workforce, presenting immense opportunities for economic growth (Clarke et al., 2023; Worldometer, 2023). Despite this, Africa's GDP per capita remains comparatively lower than other continents, highlighting the need for strategic interventions to unlock its economic potential (Statista, 2022). The SAATM, as a flagship project of the African Union Agenda 2063, holds promise for enhancing economic integration, stimulating intra-African trade, and fostering sustainable economic development across the continent (African Union, n.d. - a). By improving connectivity, reducing trade barriers, and facilitating the growth of the aviation sector, the SAATM is expected to create job opportunities, boost tourism, and contribute to poverty reduction and social cohesion (IATA, n.d. - b; OECD, 2014; WTTC, 2021).

Furthermore, the societal significance of the SAATM extends beyond economic considerations to encompass broader social and political dimensions. By promoting regulatory harmonization and facilitating the free movement of people, capital, goods, and services, the SAATM fosters a more accessible and integrated African market (European Union, 2017). This not only enhances trade and investments but also promotes diversity, inclusion, and social transformation (African Union Commission, 2015). Moreover, the SAATM is integral to the realization of Agenda 2063's vision of a peaceful, stable, and prosperous Africa (Uneca, n.d.). By managing diversity as a source of wealth and fostering improvements in governance, democracy, and human rights, the SAATM contributes to the continent's long-term development goals (IATA, 2019; African Union Commission, 2015). Despite challenges such as aviation taxes, operational costs, and infrastructure limitations, the SAATM represents a transformative opportunity for Africa, contingent upon the full commitment and participation of all African states (AFCAC, 2022; IATA, n.d. - b).

1.2 Statement of the problem

The SAATM is one of the key flagship initiatives within the AU Agenda 2063. It aims to transform the African aviation landscape, by enhancing connectivity within the continent. Despite its potential to revolutionize air transport in Africa, the implementation of the SAATM faces its own set of challenges such as regulatory barriers, infrastructure limitations, political obstacles, or other relevant issues. These challenges hinder the seamless realization of the SAATM's goals. The initiative's implementation has implications on various stakeholders within the industry.

The SAATM has the potential to revolutionize the African air transport industry as it offers numerous opportunities and it is crucial to identify and understand the main challenges and implications for the realization of a successful SAATM.

1.3 Research question

The research investigated the Key challenges, implications, and opportunities in the implementation of a Single African Air Transport Market (SAATM) in the African continent.

The specific research questions for the study were:

1. What are the primary challenges hindering the establishment of an efficient SAATM in Africa?
2. What are the potential implications, both positive and negative, associated with the realization of SAATM?
3. What future opportunities may emerge during the implementation of SAATM that could benefit the African continent and its aviation industry?

1.4 Objectives

The objective of this study was to thoroughly examine and analyze the key challenges, implications, and opportunities surrounding the implementation of SAATM. It aimed to develop a comprehensive report providing recommendations for technical experts and policymakers involved in SAATM's implementation. The study addressed critical aspects, including infrastructure development, regulatory harmonization, employment, welfare, and more.

1.5 Specific objectives

The Specific Objectives includes:

1. To identify and analyse the primary challenges hindering the establishment of an efficient SAATM in Africa
2. To assess the potential implications, both positive and negative, associated with the realization of SAATM on various stakeholders, including governments, airlines, passengers and the wider economy
3. To explore future oppprtunities that may emerge during the implementation of SAATM
4. To synthesize the findings from the research into a cohesive framework that provides actionable recommendations for technical experts and policymakers to address the identified challenges effectively

This approach utilized insights from the "Continental Study on the Benefits of the Single African Air Transport Market (SAATM) and Communication Strategy for SAATM Advocacy" by Iata (2021) as a foundation. Subsequently, the study assessed the challenges, implications, and opportunities by sending out questionnaires and gathering additional information.

1.6 Significance of the study

This study on SAATM is of paramount significance for several reasons. Firstly, it aimed to comprehensively examine and analyze the key challenges, implications, and opportunities surrounding the implementation of SAATM. By delving into critical aspects such as infrastructure development, regulatory harmonization, employment, and welfare, the study provides an holistic

understanding of the complexities involved in establishing a unified air transport market across Africa.

Secondly, the findings of this research will not only contribute to the body of knowledge on aviation economics and policy but will also serve as a valuable resource for technical experts and policymakers involved in the implementation of SAATM. The study report provides stakeholders with evidence-based recommendations. This gives them the necessary understanding to effectively manage the complexities of SAATM implementation.

Moreover, the study's emphasis on informing both national and international decision-making processes underscores its broader impact on air transport development. By generating policy recommendations that promote equity and sustainability, the research plays a crucial role in shaping the future of air transport in Africa. Ultimately, by facilitating informed decision-making and fostering collaboration among stakeholders, this study has contributed to the realization of SAATM's overarching goals of enhancing connectivity, promoting economic growth, and advancing regional integration across the African continent.

1.7 Scope of the study

This study delved into the implementation of the SAATM, focusing on key dimensions within the policy and regulatory framework, infrastructure and connectivity, geographic and time-related variables. The study aimed to evaluate the harmonization of aviation policies and regulations across African countries, with a specific focus on implementation of SAATM.

The study involved various stakeholders, such as government officials, policymakers, airlines, passengers, and regulatory bodies, from carefully selected SAATM member states. Through both cross-sectional and longitudinal analyses, it aimed to identify key Challenges, Implications, and Opportunities in the Implementation of the SAATM, including its long-term impact on the aviation sector and wider economic and social factors.

CHAPTER 2: Literature review

2.1 Introduction

This chapter examined the SAATM framework and tried to review key challenges and opportunities. The significance of the chosen research topic lied on its ability to provide valuable insights into the aviation and transport sector, specifically with regard to the implementation of the SAATM. The success of the SAATM has the potential to improve air connectivity between African countries, promoting economic growth, regional integration and tourism.

The literature review was a critical part of this research. It provided a background for understanding the current state of knowledge regarding the SAATM. It created context and contributed to the construction of a conceptual framework. It delved into the evolution of the SAATM and then examined its historical development that led to its current state. We investigated the countries that signed the agreement, as well as those that have not signed the SAATM. Furthermore, it has provided insight into the motivations for and against SAATM among the relevant countries.

The research enabled the identification of gaps and challenges in the current understanding of SAATM. The study was located within the context of African aviation and highlighted the need for empirically based insights. These insights will guide future developments in the sector.

2.2 Theoretical framework

Africa's participation in air transport is disproportionately low considering its current population. Intra-African trade and GDP per capita are also underperforming. These challenges result from inadequate infrastructure, regulatory barriers, and limited freedom traffic rights. There is a need for a fundamental change within the African air transport industry.

This need for change is translated by the Yamoussoukro Declaration, which outlines a vital plan for improvement. The ministers responsible for civil aviation from 40 African countries announced the decision during a meeting in Yamoussoukro on October 17, 1988. (Schlumberger, 2010, p. 9).

2.2.1 Multilateral regulation

According to the International Civil Aviation Organization (ICAO), a multilateral regulation in international air transport involves coordinated efforts by three or more states within international organizations or treaties. The primary objective is to establish, implement, or maintain shared arrangements, policies, and regulations relevant to all parties involved (ICAO, 2016, p. 52).

2.2.2 Freedoms of the air

As mentioned previously, the Yamoussoukro Declaration aims to improve the freedoms of the air among african States. The freedoms encompass international rights for scheduled air services. These include the first freedom, allowing overflight without landing; the second freedom, permitting landing for non-traffic purposes; the third freedom, allowing the carrier to land and pick up traffic from its home state; the fourth freedom, allowing the carrier to land and take on traffic destined for its home state from another State; and the fifth freedom, permitting landing and taking on traffic to/from a third state. Beyond these, the sixth freedom involves transporting traffic between two other states

via the carrier's home state. The seventh freedom allows transporting traffic between the granting state and any third state without connecting to the carrier's home state. The eighth freedom allows cabotage traffic between points in the granting state, and the ninth freedom permits stand-alone cabotage entirely within the territory of the granting state. ICAO refers to freedoms beyond the Fifth as "so-called". In contrast to the first five, they are not formally recognized by international treaties that regulate air services (ICAO, 2016).

2.2.3 Yamoussoukro Declaration (YD)

Despite its significance, the Yamoussoukro Declaration has encountered obstacles in its execution. Specific nations have denied traffic rights to foreign carriers. In several instances, these rights were secured through the payment of "royalties" or commissions. As a result, fifth-freedom rights could be acquired. Therefore, intra-African air traffic remained expensive and inefficient (Schlumberger, 2010, p. 26). According to the African Civil Aviation Commission (AFCAC), these fifth freedom operations accounted for about 7% of Africa's total international capacity in 2018 (Iata, 2021).

Acknowledging the challenges in African civil aviation, the Yamoussoukro Decision (YD) emerged on November 14, 1999. It was built on the principles outlined in the 1988 Yamoussoukro Declaration. Forty-four African countries signed the YD. African States pledged to deregulate their aviation services and promote regional aviation markets with trans-national competition. Afterward, the decision was officially adopted by the Assembly of Heads of State and Government of the Organization of AU in July 2000 (Ghana News Agency, 2018).

However, the implementation of the YD progressed more slowly than expected. This was due to various reasons, including difficulties faced by several nations in fully adopting the decision at a national level. It was also held back by bilateral agreements, and challenges related to infrastructure and capacity. Therefore, there was a need for another approach to speed up the implementation process.

2.2.4 The Single African Air Transport Market (SAATM)

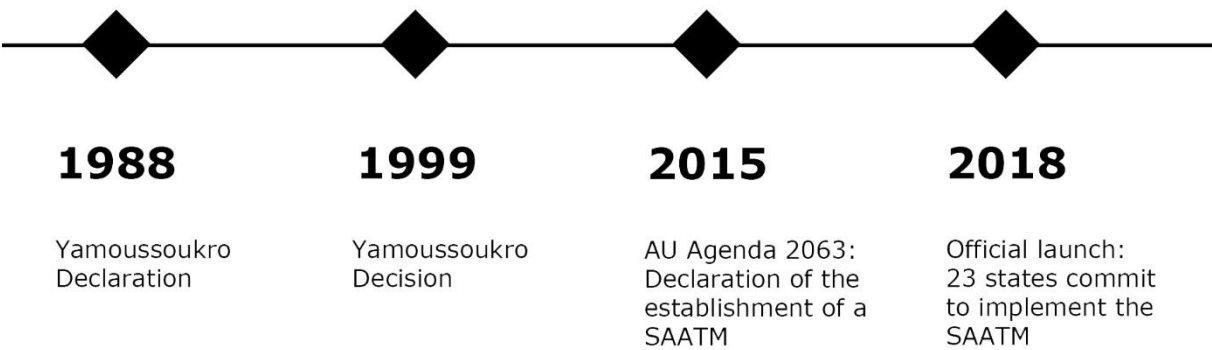
In 2015, the 24th Ordinary Session of the AU Assembly took place in Addis Ababa, Ethiopia. At this event, the executives of the state and government of the AU adopted Agenda 2063. The Single African Air Transport Market (SAATM) was the first of twelve leading projects included in Agenda 2063. The project was introduced in 2018, at the 30th Ordinary Session of the AU Assembly. It is an essential part of the integration agenda of the AU. The SAATM complies with free movement of people and African passport standards. It also provides crucial logistics infrastructure for the smooth functioning of Africa's continental free trade area (IATA, 2019).

The other flagship projects addressed by the Agenda 2063 include: "an integrated high speed train network; the formulation of an African Commodities Strategy; The establishment of the African Continental Free Trade Area [Afcfta]; the African passport and free movement of people; silencing the guns by 2020; the Implementation of the grand Inga dam project; the establishment of an annual African economic forum; the establishment of the African financial institutions; The pan-African e-network; the Africa outer space strategy; an African virtual and e-university; the adoption of cyber

security; the great African museum; the Encyclopaedia Africana” (African Union, n.d. – a). However, this paper has exclusively examined the implementation of the SAATM.

The full implementation of the SAATM is considered crucial in order to harness the potential of aviation in Africa (Global Data Point, 2023). It was developed to speed up the YD’s full implementation (IATA, n.d. – b). However, the goals of the YD differ slightly from those of the SAATM. The YD focused on sustainable air transport development, a conducive environment, liberalized intra-African markets, and improved service quality. SAATM, on the other hand, seeks to have a unified African air transport market, civil aviation liberalization, and economic integration (Peter Amaleboba, n.d.).

Figure 1: Development of the SAATM



Source: AFCAC, n.d. - a

In summary, the SAATM originates from the Yamoussoukro Declaration of 1988, enforced by the Yamoussoukro Decision in 1999. Sixteen years later, the formal declaration of the establishment of a SAATM was made to speed up the YD. The official launch took place in 2018. *Figure 1* visualizes this as a timeline to show the historical development of the SAATM.

So far, 37 nations have signed up to the SAATM (African Union, 2021). This list includes: Angola, Benin, Botswana, Burkina Faso, Cabo Verde, Cameroon, Central African Republic, Chad, Congo Republic, Cote d’Ivoire, Democratic Republic of Congo, Egypt, Equatorial Guinea, Eswatini, Ethiopia, Gabon, The Gambia, Ghana, Guinea, Guinea Bissau, Kenya, Lesotho, Liberia, Mali, Morocco, Mozambique, Namibia, Niger, Nigeria, Rwanda, Sao tome et Principe, Senegal, Sierra Leone, South Africa, Togo, Zambia, Zimbabwe (AFCAC, n.d. - b).

The countries that have not yet signed on include Algeria, Burundi, Comoros, Djibouti, Eritrea, Libya, Madagascar, Malawi, Mauritania, Mauritius, Seychelles, Somalia, South Sudan, Sudan, Tanzania, Tunisia and Uganda. Collectively, these countries account for the remaining 20% of the existing aviation market in Africa. (AFCAC, n.d. - b).

2.2.5 Memorandum of Implementation (MoI)

During the 4th Ministerial Working Group Meeting in Lomé, SAATM member States gathered to enhance the operationalization of the SAATM. Ministers committed to signing harmonized Bilateral

Air Services Agreements (BASAs) and adopting a Memorandum of Implementation (MoI) to eliminate any air service agreement restrictions that are not YD compliant (IATA, 2019).

In 2019, the MoI was signed by 18 member states of the SAATM, including: “Benin, Burkina Faso, Cabo Verde, Central African Republic, Congo, Cote d’Ivoire, Ethiopia, The Gambia, Ghana, Guinea, Liberia, Mali, Mozambique, Niger, Nigeria, Rwanda, Sierra Leone and Togo” (IATA, 2021).

2.2.6 African Union Commission (AUC)

The African Union Commission, based in Ethiopia, functions as the administrative arm of the AU. It represents the AU's interests, implements decisions, manages resources, and coordinates actions to ensure cohesion among member states (AUC, n.d.). Within SAATM, the AUC facilitates its implementation, coordinates with member states, and promotes harmonization of policies to enhance aviation connectivity across the continent (IATA, 2021).

2.2.7 African Civil Aviation Commission (AFCAC)

The African Civil Aviation Commission is at the forefront of advancing aviation integration in Africa through its execution of the YD and the establishment of the SAATM. By facilitating cooperation among African states and promoting the implementation of international aviation standards, AFCAC aims to create a robust and sustainable civil aviation industry. Through its oversight role, AFCAC ensures the harmonization of regulations and fair competition. This results in enhanced connectivity and accessibility across the continent (AFCAC, n.d. - c; IATA, 2021).

2.2.8 African Airlines Association (AFRAA)

The African Airlines Association, is a vital trade organization representing African airlines. It advocates for their interests and fosters cooperation among members to enhance the competitiveness and sustainability of African aviation. In the context of the SAATM, AFRAA's role is pivotal. It aims to promote collaboration among airlines and advocates for a favourable regulatory environment. As a result, AFRAA contributes to the development of a seamless and efficient air transport network across the continent. This is crucial for SAATM's success (IATA, 2021).

2.2.9 International Air Transport Association (IATA)

The International Air Transport Association is the global trade organization, representing 83% of worldwide air traffic. It sets standards and advocates for policies supporting safe, secure, and efficient air transport worldwide. In Africa, IATA collaborates with stakeholders to promote initiatives like SAATM, ensuring growth and connectivity in the region (IATA, n.d. - a; IATA, 2021).

2.2.10 International Civil Aviation Organization (ICAO)

The International Civil Aviation Organization, a specialized United Nations (UN) agency, plays a crucial role in establishing global aviation standards and regulations. In Africa, ICAO works closely with member states and regional organisations to promote aviation safety, security and efficiency. By providing policy direction and technical assistance, ICAO supports initiatives such as SAATM. This facilitates compliance with international standards and promotes cooperation among African states.

This partnership ensures the advancement of safe and orderly civil aviation, promoting connectivity and socio-economic development across the continent (ICAO, n.d.; IATA, 2021).

2.3 Theory

The comprehensive "Continental Study on the Benefits of the Single African Air Transport Market (SAATM) and Communication Strategy for SAATM Advocacy" by Iata (2021) contained a wealth of insights into the challenges, opportunities, and implications inherent in the SAATM implementation. Below is a summary of the key findings from the study relevant for this work

2.3.1 Challenges

The full and collective embrace of the SAATM is necessary for the progress of all countries involved. Without the sincere commitment of African countries and airlines, the continent, its people and its aviation sector cannot reach their full potential. It is crucial that each country actively participates to unlock the numerous benefits of the SAATM for the whole of Africa (IATA, 2019). However, implementing the SAATM faces the challenge of integrating diverse regulatory frameworks governing aviation industries across Africa. SAATM's objective of establishing a harmonized regulatory framework implies the need for aligning these varying frameworks (IATA, n.d. - a).

One of the fundamental challenges lies in the compliance with the YD, the cornerstone agreement of the SAATM. Despite its significance, no state has achieved 100% compliance with their BASAs. Furthermore, a staggering 21 out of 55 AU Member States fall below the ICAO Effective Implementation 60% threshold for safety. 10 of these states were SAATM members. This underscores the imperative of uniform safety measures to foster a reliable aviation system across the continent (IATA, 2021).

2.3.1.1 Cultural and policy impediments

Delving deeper, two overarching obstacles emerge. These include the tendency among governments to deprioritize aviation and adopt protectionist policies. These entrenched attitudes pose barriers to the harmonized implementation of the SAATM. Weak political will results in a fragmented approach to YD implementation across states. This is driven by either protectionist motives or a lack of aviation prioritization, particularly evident in smaller market economies. This lack of momentum not only disrupts industry unity but also impedes the essential multisectoral collaboration necessary for policy alignment (IATA, 2021).

2.3.1.2 Operational challenges

In addition to cultural and policy barriers, operational barriers further complicate SAATM implementation. Visa restrictions imposed by many states not only inflate entry costs but also diminish connectivity and trade facilitation. Exorbitant taxes and fees also worsen the financial burden on airlines, threatening growth prospects. Inadequate air and ground infrastructure boost operational costs, while a shortage of skilled personnel limits the sustainability of the sector. Moreover, the absence of a streamlined approach to operationalising Article 6 of the Chicago Convention hinders seamless air navigation under SAATM (IATA, 2021).

In the context of the intra-Africa route network, only 35% of routes (375) are operated daily or more frequently, and a mere 13% are serviced twice daily or more. This limited frequency results in a low volume of short trips, thereby impeding connectivity and the efficient movement of people and goods across the continent (IATA, 2021, p. 156).

2.3.1.3 Strategic recommendations

In the face of these challenges, strategic recommendations emerge as beacons of progress (IATA, 2021):

1. **Uniform Safety Measures:** Prioritize achieving the minimum 60% Effective Implementation score to ensure uniform safety standards continent-wide.
2. **Infrastructure Investment:** Address infrastructure deficits urgently to boost aviation infrastructure.
3. **Taxation Reform:** Mitigate high taxes and charges to stimulate industry growth.
4. **Streamlined Procedures:** Advocate for the removal of unnecessary operational impediments, such as approval requirements for Foreign Operations Specification.
5. **Policy Prioritization:** Encourage governments to prioritize aviation for economic prosperity.
6. **Combat Protectionism:** Re-evaluate protectionist policies to foster industry efficiency and growth.
7. **Multilateral Solutions:** Pursue a multilateral approach, steered by central bodies like the AUC and the AFCAC, to expedite SAATM implementation.

2.3.2 Implications

The implementation of the SAATM involves several potential implications, both positive and negative. The SAATM promises to strengthen connectivity and economic integration in Africa. However, it needs careful attention on regulatory harmonisation, infrastructure development, and competitive dynamics within the aviation industry. To realise SAATM's full potential and to promote sustainable growth and prosperity across Africa, it is crucial to balance these factors.

2.3.2.1 Sky's the limit: increased competition and service quality

The liberalization of air transport under SAATM is set to stimulate competition among airlines. This competitive environment encourages carriers to enhance their service offerings to attract and retain passengers. Improved service quality might manifest in various forms, such as better in-flight services, more punctual schedules, and enhanced customer care. Moreover, competition often leads to competitive pricing and more affordable air travel for passengers (IATA, 2021, p.141). Affordability can increase the overall demand for air travel, creating a virtuous cycle where increased passenger volumes further drive service improvements and cost efficiencies.

2.3.2.2 Bridging distances: expanded routes and connectivity

One of the primary benefits of SAATM is the expansion of route networks. By removing restrictive BASAs, airlines will introduce new routes and increase their frequency of existing ones (IATA, 2021, p.141). This expansion enhances connectivity across the continent, providing passengers with additional travel routes and reducing overall travel times. Enhanced connectivity can also facilitate trade, tourism, and business activities, contributing to overall economic growth. Additionally,

improved connectivity can help to integrate remote or underserved regions into the broader economic landscape, promoting inclusive development (IATA, 2021, p. 146).

2.3.2.3 Flying high: surge in air traffic volumes

The liberalization of air transport is expected to lead to a significant increase in air traffic volumes. By making air travel more accessible and affordable, both business and personal travel are likely to see a surge (IATA, 2021, p.142). Increased air traffic can have several positive effects, including higher revenues for airlines and airports, job creation in the aviation and related industries, and greater economic activity in regions with improved air services. However, this surge also necessitates careful planning and investment in airport infrastructure and air traffic management systems to ensure safety and efficiency are maintained.

2.3.2.4 Budget-friendly flights: rise of low-cost carriers

The liberalized market environment facilitated by SAATM is conducive to the rise of low-cost carriers (LCCs) (IATA, 2021, p.141). These carriers focus on offering budget-friendly travel options by streamlining operations and reducing costs. The presence of LCCs can significantly drive competition in the market, compelling traditional carriers to adapt and innovate. For passengers, this translates to more affordable travel options and increased accessibility to air travel. The growth of LCCs can also stimulate secondary markets, promoting tourism and economic development in regions that become more accessible due to lower fares (IATA, 2021, p. 144).

2.3.2.5 Economic tailwinds: liberalization's boost to growth

The liberalization policy under SAATM aims to stimulate economic growth by optimizing airline networks and improving traffic flow patterns. By attracting new market entrants, SAATM fosters a more dynamic and competitive aviation sector (IATA, 2021, p.141). This competitiveness can lead to efficiency gains, cost reductions, and increased investment in the aviation industry. As airlines expand their networks and increase frequencies, they contribute to greater economic activity by facilitating trade, tourism, and business travel (IATA, 2021, p.146).

2.3.3 Future opportunities

The implementation of the SAATM offers a plethora of opportunities set to revolutionise the aviation landscape and catalyse socio-economic development across the continent. Based on the insights from the continental research conducted by IATA, the transformative potential of SAATM is clear in several dimensions (IATA, 2021).

To better understand the full impact of SAATM, it is important to consider how its benefits align with the UN Sustainable Development Goals (SDGs). The SDGs are a set of 17 global goals designed to be a "blueprint to achieve a better and more sustainable future for all" (United Nations, 2021). They tackle worldwide issues including climate change, inequality, peace and justice. The SAATM's implementation will contribute to these goals and support the broader developmental agenda of the AU Agenda 2063.

2.3.3.1 Enhanced market access and connectivity

One of the most significant opportunities is the prospect of enhanced market access and connectivity. Liberalizing BASAs is anticipated to unlock a variety of benefits, including improved market access, greater connectivity, increased competition, and ultimately lower passenger fares. The forecast of a 51% increase in intra-Africa passenger traffic indicates significant demand to be met (IATA, 2021). This increased connectivity aligns with UN SDG #11: Sustainable Cities and Communities, as it promotes the development of accessible and sustainable transport systems (United Nations, 2021).

2.3.3.2 Economic growth and prosperity

Beyond aviation, SAATM also offers broader economic benefits. Expected fare reductions of 26.4% on average at the continental level translate into significant cost savings for passengers, amounting to US\$ 1.46 billion annually. Increased consumer welfare, captured through concepts like consumer surplus, underscores the tangible benefits for individuals and households. Furthermore, the forecasted increase in the number of direct flights between country pairs and enhanced flight frequencies promises greater convenience and choice for travelers (IATA, 2021). This economic boost contributes to UN SDG #8: Decent Work and Economic Growth and AU Agenda 2063's goal of a high standard of living and well-being for all citizens (United Nations, 2021).

2.3.3.3 Stimulating employment and investment

SAATM's impact extends beyond the aviation sector and penetrates various facets of the economy. The increase in air service levels will boost employment in the aviation sector, leading to new jobs and economic growth. Moreover, the projected boost in tourism spending and the facilitation of trade and investment are expected to generate additional economic activity. This will result in increased employment and a growing GDP in all AU countries (IATA, 2021). These outcomes support UN SDG #1: No Poverty, UN SDG #10: Reduced Inequality, and AU Agenda 2063's goal of transformed economies with world-class infrastructure (United Nations, 2021).

2.3.3.4 Promoting sustainable development

In line with broader developmental agendas, SAATM holds the potential to advance key SDGs and AU Agenda 2063 objectives. By improving access to education, healthcare, and essential services, SAATM contributes to social welfare and poverty reduction. Additionally, the shift towards more efficient transportation modes, highlights SAATM's commitment to environmental management, decreasing the continent's overall environmental footprint (IATA, 2021). These efforts align with UN SDG #13: Climate Action, UN SDG #7: Affordable and Clean Energy, and UN SDG #12: Responsible Consumption and Production, promoting environmentally sustainable and climate-resilient economies and communities (United Nations, 2021).

2.3.3.5 Promoting unity and inclusivity

SAATM's impact transcends economic areas, fostering greater unity, culture, and connectivity across the continent. Initiatives to promote workforce diversity, including increased female employment in the aviation industry, align with broader aspirations for gender equality and social inclusion (IATA, 2021). These initiatives support UN SDG #5: Gender Equality and AU Agenda 2063's vision of full gender equality in all spheres of life (United Nations, 2021).

2.3.3.6 Strategic recommendations for realizing SAATM's potential

To fully connect these opportunities, combined efforts are required at both the national and regional levels. It is critical to motivate current SAATM members to completely implement the agreement and to convince remaining non-member states to sign up on the initiative. This necessitates a multifaceted approach, including the continued adjustment of non-compliant BASAs, the adoption of multilateral agreements, and adherence to international safety standards and best practices (IATA, 2021). These strategic actions will contribute to UN SDG #17: Partnerships for the Goals, facilitating unified efforts toward sustainable development (United Nations, 2021).

2.4 Empirical literature

Aviation plays a pivotal role in Africa due to the continent's limited alternative infrastructure. It is a superior way to get around the continent, compared to road transport, rail transport or water transport (IATA, 2019). Furthermore, the aviation sector as a whole holds considerable economic importance. Statistics have shown that the estimated market size of the global airline industry accounts for up to 814.3 billion U.S. dollars (Statista, 2023-a).

However, Intra-African trade is notably underdeveloped, with statistics indicating that trade within Africa accounted for only 15.2% during the period of 2015-2017. This figure pales in comparison to the levels seen in other regions such as Asia, where intra-regional trade stands at 50%, and Europe, where it reaches 64% (afraa, 2020). The current state of aviation in Africa can be attributed to the bad infrastructure, high costs of operations, lack of connectivity, regulatory impediments, slow adoption of global standards and skills shortages (IATA, 2023).

SAATM will contribute to aviation significantly by connecting Africa, fostering social, economic, and political integration, while enhancing intra-Africa trade and tourism (IATA, n.d. - b). According to the AFCAC report, the intra-Africa traffic volume will increase by 51 percent through the full implementation of the SAATM (AFCAC, 2022).

As well, the Intra-Africa passenger traffic is estimated to grow from 31.2 million to 47.1 million due to BASA liberalization, representing an extra 15.9 million passenger trips. This growth is hindered by factors like cost, flight availability, or service convenience (IATA, 2021, p. 160). Additionally, BASA liberalization is estimated to create 588,750 additional jobs and contribute an extra US\$ 4.0 billion to GDP annually across AU countries (IATA, 2021, p. 197).

2.4.1 Africa Visa Openness Index

The Africa Visa Openness Index (AVOI) is an initiative being done through the collaboration between the African Development Bank and the Africa Union Commission. It evaluates African countries' visa policies for travelers from other African nations. It assesses whether countries allow visa-free entry, provide visas on arrival, or require visas beforehand.

Since the introduction of AVOI in 2016, there have been significant developments. Visa-free travel has increased by 40%, demonstrating active governmental efforts. According to the 2023 AVOI report, over one in four country-to-country trips are now visa-free for African citizens. Progress has also been made with visas on arrival, showing a 4% increase, meaning approximately one in four

travelers can obtain a visa upon arrival. The most notable change however is in the reduction of visas required beforehand, which has decreased by 16%. This downward trend over the past years is highly favorable and is expected to continue (AFDB & AU, 2021).

2.4.2 Evolution since 2021

2.4.2.1 Policy and regulatory changes

As of 2021, 35 African countries had signed the SAATM agreement (Iata, 2021). By 2024, this number has increased to 37, demonstrating growing political support for the initiative. The two new signatories in 2024 were Angola and Sao Tome et Principe (AFCAC, n.d.-b). The AU continues to encourage more countries to join, aiming for full continental participation.

2.4.2.2 Passenger demand and seat availability

In June 2024, there was a slight increase of 0.5% in seat availability on intra-Africa routes, due to the introduction of extra routes, network expansions, and fleet improvements (AFRAA, 2024). In contrast, the 2021 SAATM study by IATA projected that fully implementing SAATM could boost intra-Africa passenger traffic by 51%, growing from 31.2 million to 47.1 million passengers. The study emphasized that such an increase would rely heavily on the liberalization of air services and the elimination of barriers. This would significantly improve seat availability and stimulate passenger demand (Iata, 2021).

2.5 Conclusion

The SAATM represents a transformative opportunity for Africa. It aligns with the AU's Agenda 2063 to reshape the continent's aviation sector and spur economic growth. With Africa's population exceeding 1.4 billion and a median age of 18.8 years, the continent holds substantial potential to emerge as a global economic powerhouse. The SAATM aims to enhance connectivity, reduce trade barriers, and stimulate intra-African trade, fostering sustainable development.

However, the successful implementation of the SAATM faces several challenges. These challenges include: regulatory barriers, infrastructure limitations, and political obstacles that need to be addressed to realize the initiative's full potential. To overcome these challenges, there is need for harmonized regulatory frameworks, compliance with the YD, and overcoming operational hurdles such as visa restrictions and high taxes. Strategic recommendations—such as uniform safety measures, infrastructure investment, and combating protectionism—provide a pathway to overcoming these barriers.

This research highlights the broader societal significance of SAATM. It aimed to emphasize the role required in promoting regulatory harmonization, facilitating the free movement of people, capital, goods, and services, and fostering a more integrated African civil aviation market. This integration is expected to enhance trade and investment, promote diversity and inclusion, and contribute to social transformation. These goals align with Agenda 2063's vision of a peaceful, stable, and prosperous Africa.

SAATM is anticipated to create job opportunities, boost tourism, and contribute to poverty reduction and social cohesion. For these benefits to emerge, the commitment and participation of all African states are crucial. Complete stakeholder engagement—including governments, airlines, passengers, and regulatory bodies—is essential for addressing the identified challenges effectively.

The literature review underscores the potential of SAATM to significantly enhance air connectivity, stimulate economic growth, and promote regional integration and tourism. It provides a thorough analysis of the historical evolution, theoretical foundations, and challenges of SAATM. The research offers actionable recommendations for policymakers and technical experts. These recommendations will support informed decision-making and contribute to the successful realization of SAATM's goals.

In conclusion, while the SAATM faces notable challenges, it presents a significant opportunity to revolutionize Africa's aviation landscape. The successful implementation of SAATM will drive socio-economic development and regional integration, aligning with the continent's broader goals of sustainable development and unity. This research provides a comprehensive understanding of SAATM's current state, identifying both its challenges and its immense potential for growth and development in Africa's air transport sector.

CHAPTER 3: Research Methodology

3.1 Introduction

This chapter highlights the methodology that was used in conducting the study, defining the research design, target population, and appropriate sample size. It also includes the data collection tools, analysis techniques and models employed.

3.2 Research design

The research design serves as a structured framework linking conceptual issues to empirical investigation, providing clear guidance for methodological choices (Creswell, 2014). It enables the development of an empirical test to validate existing knowledge, ensuring validity, reliability, and meaningful results. In this study, a descriptive survey method was employed, aligning with the study's aims, objectives, theoretical framework, timeframe, and ethical considerations. This process ensured a well-planned, rigorous, and ethical study, predominantly concentrating on the SAATM states, while referencing its origins.

3.3 Target population and sample selection

The target population for this research encompasses individuals working in the African aviation sector. Given the scope of the SAATM, which is pertinent to the entire continent, the population considered for this study includes representatives from all 54 African countries. This wide-ranging scope ensured that the research addresses diverse perspectives and experiences relevant to the SAATM's objectives and implementation from the sector experts and players.

While the entire continent's involvement is crucial, this study employed a stratified sampling method to focus on a subset of 33 African states. This selection was strategic, based on the significance and expertise of these states within the African aviation sector. The sample aimed to provide a comprehensive representation of the continent's aviation dynamics by including states with varying levels of aviation activity and regulatory frameworks. Rationale for Sample Composition The careful selection of countries and respondents was designed to capture a broad spectrum of insights, reflecting the multifaceted nature of the aviation industry across Africa. By targeting delegates from civil aviation authorities and airline operators, the study benefits from the expertise of those who are both policymakers and practitioners. This dual perspective is essential for a nuanced understanding of the SAATM's impact and the challenges and opportunities it presents.

Moreover, the inclusion of respondents with high educational qualifications and substantial professional experience ensures that the findings are grounded in expert knowledge and practical realities. The age diversity among respondents further enriches the study, providing a balanced view that incorporates both seasoned professionals and emerging leaders in the aviation sector.

3.4 Data collection tools

Given the scope of the research and the nature of the required data, a questionnaire was employed as the primary data collection instrument. This method is highly preferred for its suitability in gathering data from large populations simultaneously, as noted by Rea and Parker (2014). Additionally, the questionnaire facilitated seamless data accumulation, allowing for easier analysis and interpretation.

The questionnaire played a crucial role in the data collection strategy, enabling a comprehensive investigation into various aspects of the SAATM. It was designed to gather detailed insights from different stakeholders, covering the initiative's implications, challenges, and opportunities. By targeting specific entities and individuals within the African aviation sector, the questionnaire aimed to capture a broad range of perspectives and expert opinions essential for this research.

3.5 Data analysis

The collected research data was analyzed through descriptive statistical analysis, as recommended by Mishra et al. (2019). This approach evaluated mean, percentages, and frequencies of user responses, coded into a common format for ease of analysis. Responses were transformed and organized to reflect the research problem, the data was processed using statistical tools e.g. Rstudio and Excel. The findings are presented graphically through charts or in tabular format for clear interpretation.

CHAPTER 4: Data analysis, presentation and interpretation

4.1 Analysis

This Chapter presents a detailed analysis of key findings and interpretation. The study anticipated responses from 16 selected African states. However, as shown in Figure 2, the actual 36 respondents' nationalities distribution indicate that 17 states participated in the study.

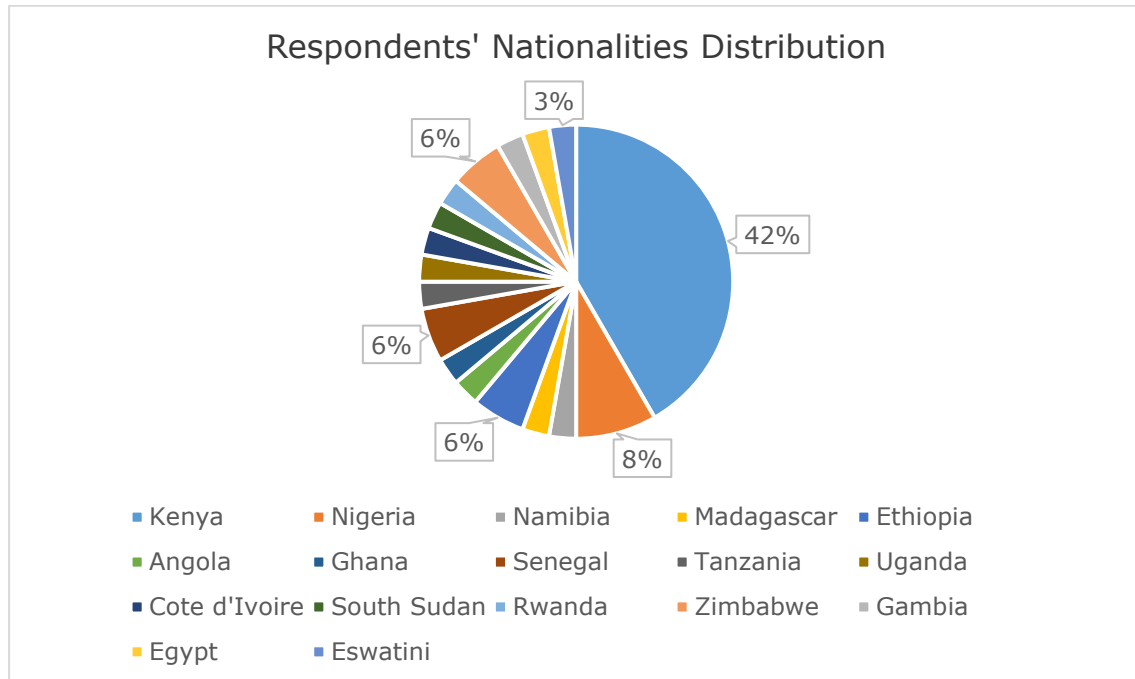


Figure 2: Distribution of Respondents' nationalities

4.1.1 Respondent profile

The respondents targeted in this study were primarily delegates actively involved in the aviation industry, including representatives from civil aviation authorities, airports and airline operators. The focus on key stakeholders ensured that the insights gathered are both relevant and authoritative. The results reflect the perspectives of those directly engaged in the operational and regulatory aspects of African civil aviation.

The demographic profile of the respondents indicated a high level of educational attainment and professional engagement. The educational background of the respondents revealed that a significant majority (91.6%) has achieved a bachelor's degree or higher educational achievement. Within this educated group, over 70% has also obtained a master's degree, underscoring the advanced academic qualifications prevalent among the participants. This high level of education suggests that the respondents were well-equipped to provide informed and insightful contributions to the study.

In terms of employment status, almost all respondents (86.1%) are employed full-time. This high rate of full-time employment indicated that the participants are actively engaged in the aviation sector and are likely to have current and relevant experiences and insights to share.

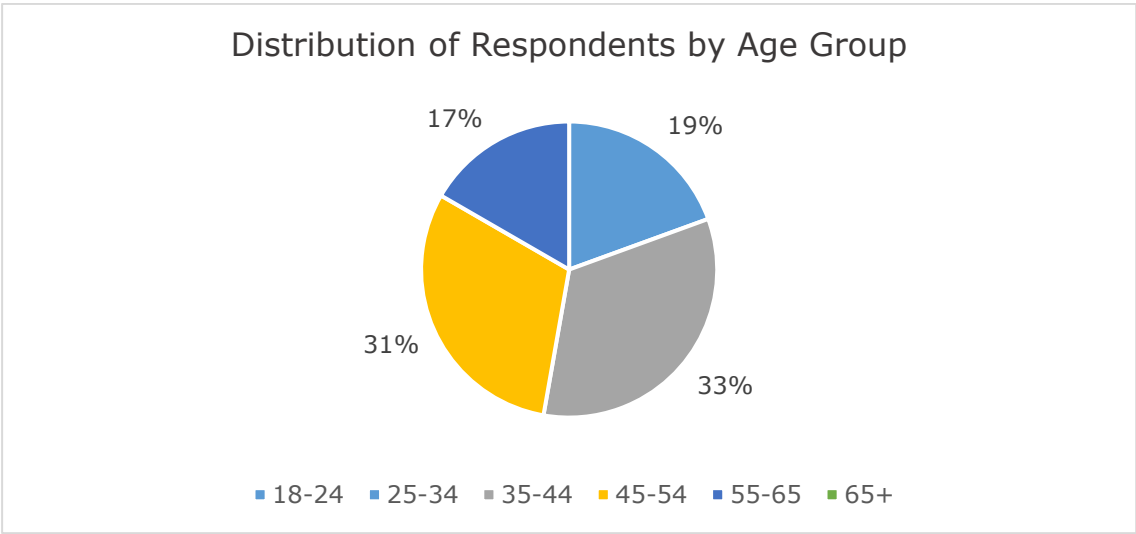


Figure 3: Distribution of respondents by age group

To ensure a diverse range of perspectives, the survey included respondents from various age groups, as detailed in Figure 3. Specifically, 19.4% of the respondents were aged between 25-34 years, 33.3% were aged between 35-44 years, 30.6% were aged between 45-54 years, and 16.7% were aged between 55-64 years. This distribution across different age brackets provides a balanced view that incorporates both the experiences of seasoned professionals and the fresh perspectives of younger participants in the aviation industry.

4.1.2 Rating of general awareness of SAATM

4.1.2.1 Rating of general awareness of SAATM

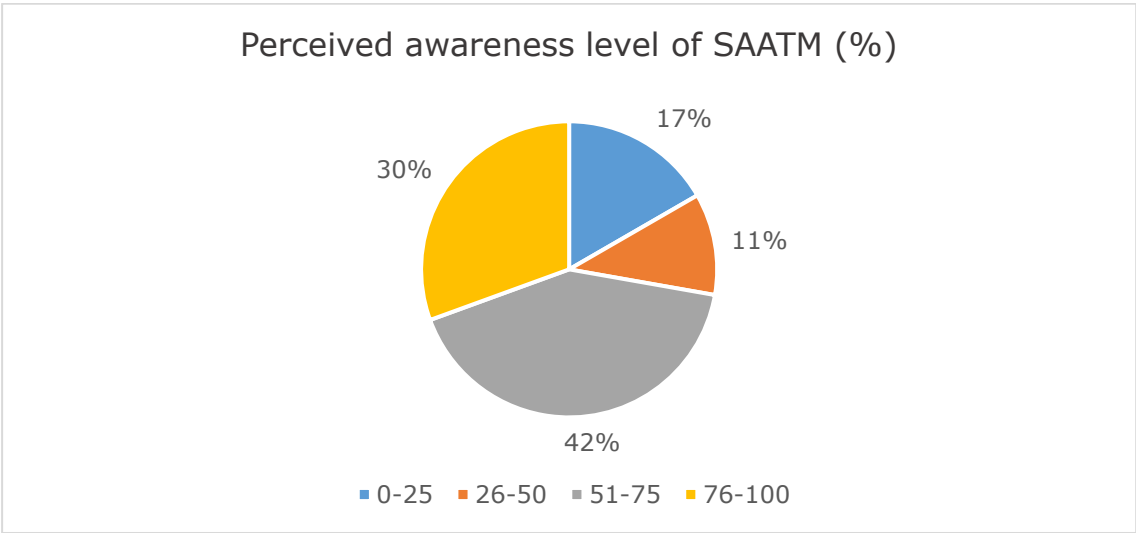


Figure 4: Awareness level (in %) of SAATM

The first section of the questionnaire assessed respondents' perceptions of the general awareness of the SAATM within the broader African Civil Aviation. This section aimed to assess how well-informed the public and stakeholders across the continent are regarding SAATM, its objectives, and its potential benefits and challenges.

Respondents estimated the level of awareness of SAATM among the African population, using four distinct percentage ranges: 0-25%, 26-50%, 51-75%, and 76-100%. The results are displayed in *Figure 4*. These results showed that 17% of respondents perceived awareness of SAATM in the lowest bracket, 0-25. Another 11.1% of respondents estimated the general awareness to be within the 26-50% range. This view reflects a belief that while some segments of the population have moderate awareness of SAATM, there remains a considerable gap in understanding. This moderate perception highlights an opportunity for targeted informational campaigns to elevate awareness beyond the current level.

In contrast, 41.7% of respondents felt that the awareness falls within the 51-75% range, indicating a fair grasp of SAATM among the majority. There is still room for enhancing knowledge and engagement to achieve more comprehensive awareness.

Lastly, 30.6% assessed the awareness level to be in the highest range, 76-100%, suggesting effective educational and outreach efforts for a significant segment of the population. This indicates that 72.3% of the respondents were aware of the SAATM implementation and were the best target group in the survey.

4.1.2.2 Regional patterns based on rating general awareness of SAATM

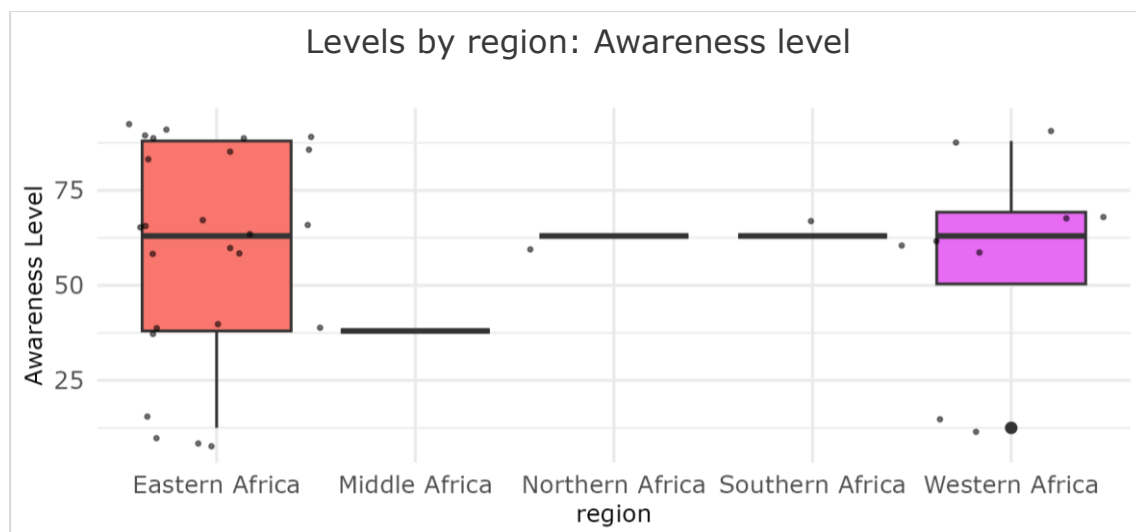


Figure 5: Perceived awareness level by region

The majority of respondents perceived the awareness level of SAATM among the African population to be between 51-75% or 76-100%. Respondents from the East and Southern African regions perceive that the awareness levels of SAATM are higher, while West African countries show more variability. Northern Africa has limited representation in the data, but the available responses indicate moderate perceived awareness levels.

4.1.2.3 Demographic patterns based on rating general awareness of SAATM

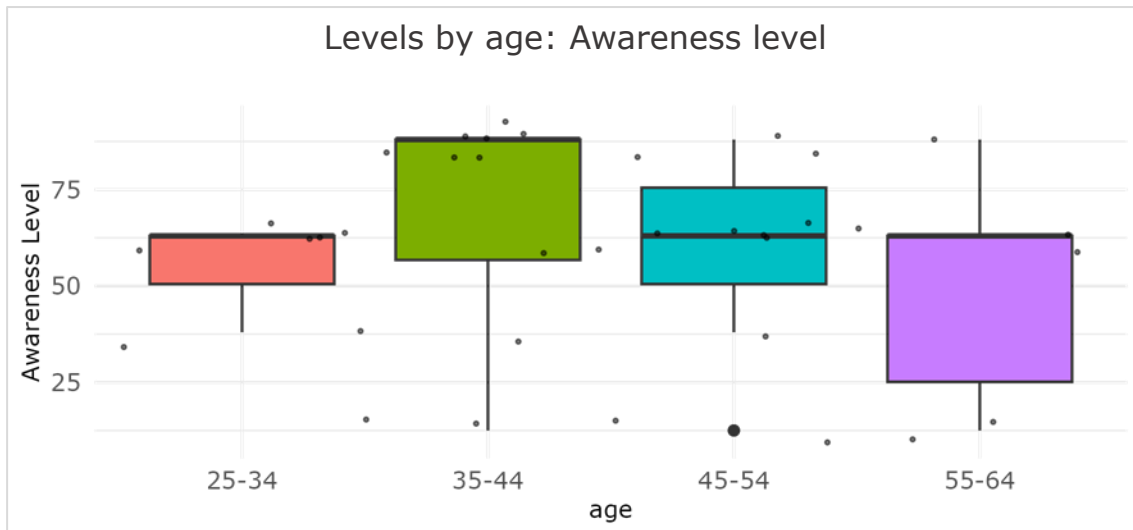


Figure 6: Perceived awareness level by age

When examining responses by age group, it is evident that perceptions of public awareness vary. As shown in Figure 6, respondents across different age groups had differing views on the general awareness of SAATM. For instance, those who rated the awareness level as 76-100% were predominantly from the 35-44 age group, suggesting that this demographic tends to perceive the public as more informed. On the other hand, respondents from the 55-64 age group provided more mixed assessments, with some perceiving very low awareness (0-25%) and others identifying moderate levels of awareness (51-75%).

4.1.2.4 Socio-economic patterns based on rating general awareness of SAATM

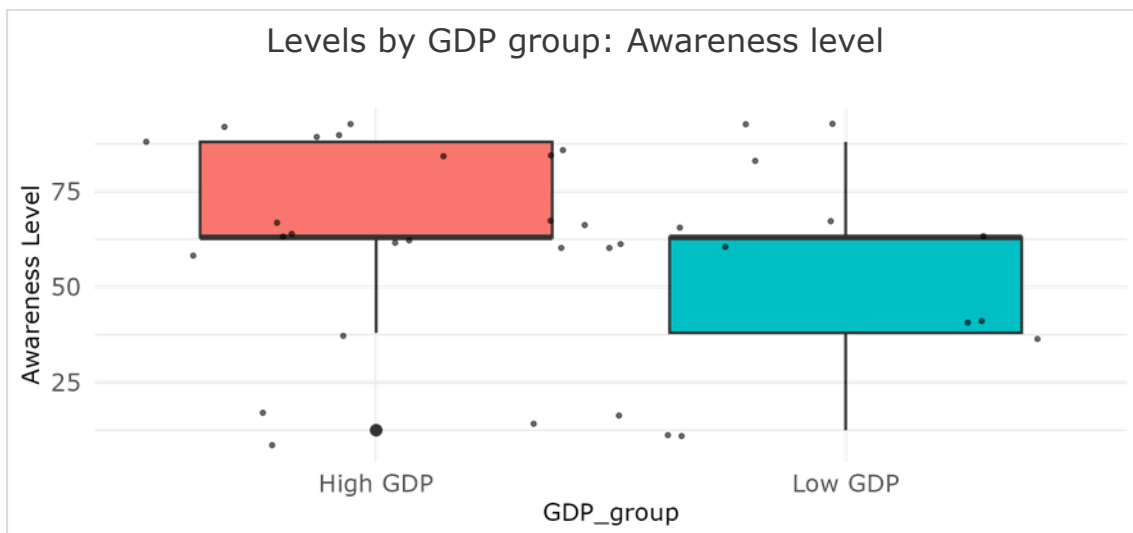


Figure 7: Perceived awareness level by GDP group

When considering the GDP of countries, a clear pattern emerges: As shown in Figure 7, respondents from higher GDP countries tend to report greater awareness of SAATM among the African countries. This suggests that economic factors may influence the perceived awareness of SAATM, with higher

GDP countries potentially having better access to information and resources related to the initiative and the general conditions of aviation in these countries.

4.2 Factors hindering the full implementation of the SAATM

This analysis synthesizes responses from respondents across different nationalities and age groups. The goal was to identify common obstacles and discern patterns based on demographic, regional, and economic factors.

4.2.1 Main challenges

The respondents were asked to indicate the main challenges hindering the implementation of the SAATM.

4.2.1.1 Commonly identified challenges

Respondents identified several challenges hindering the implementation of SAATM. Commonly cited challenges included political will, regulatory and bureaucratic hurdles, economic and financial constraints, capacity building, language barrier, social and cultural factors, and sector-specific challenges.

Political will: respondents indicated that there is unwillingness to comply with SAATM regulations due to various political reasons. This lack of commitment is often rooted in concerns about national sovereignty and market protectionism, where states fear increased competition from more developed airlines which could threaten their own state-owned carriers. Protectionist policies are prevalent, with some countries unwilling to open their markets, which hinders efforts toward liberalization and regional integration. Moreover, political instability in some regions further complicates the situation, as unstable governments are less likely to prioritize and effectively implement such comprehensive initiatives.

Regulatory and bureaucratic hurdles: The bureaucracy in processing approvals at the member state level slows down the implementation process. Divergent regulations and a lack of regulatory harmonization between countries create complexities and inefficiencies. Some states have not fully aligned their BASAs with SAATM provisions, further hindering progress. Understanding the regulatory framework and ensuring effective communication between different authorities is also challenging, contributing to delays and resistance.

Economic and financial constraints: High taxes, corruption and limited financial resources strain the capacities of airlines and aviation authorities. Many African airlines struggle to secure the necessary financing to expand their fleets and improve services. Furthermore, resource constraints are not limited to financial aspects but extend to infrastructure deficits as well. A lot of African countries do not have the required infrastructure to support a robust aviation sector. Insufficient infrastructure development is a critical impediment, as it directly affects the operational efficiency and safety of air transport services.

Capacity building and industrial incapacity: The continent's industrial capacity to keep up with the global dynamics of technological innovation places African airlines at a disadvantage. Capacity

building is essential as there is insufficient expertise. Therefore training is necessary to manage and operate within a liberalized air transport market effectively. The lack of required infrastructure and state capacity to implement SAATM compounds these issues.

Social and cultural factors: Language barriers and political and cultural diversity make coordination and consensus-building more challenging. Some stakeholders lack awareness and understanding of the initiative.

Sector-specific challenges: These include airlines' resistance to SAATM due to fears of increased competition and the prevalence of protectionist policies by states looking to protect their national airlines. The resistance from airlines and some state authorities is partly driven by the fear of losing market share.

4.2.2 Regulatory harmonization across Africa

The respondents were requested to rate how significant the lack of regulatory harmonization across African countries was a challenge to the implementation of SAATM.

The responses revealed a strong consensus on its impact. The respondents rated the significance on a scale from 0 (Not significant) to 5 (Extremely Significant), with the majority indicating a high level of concern (61%).

4.2.2.1 Overall impact of regulatory harmonization

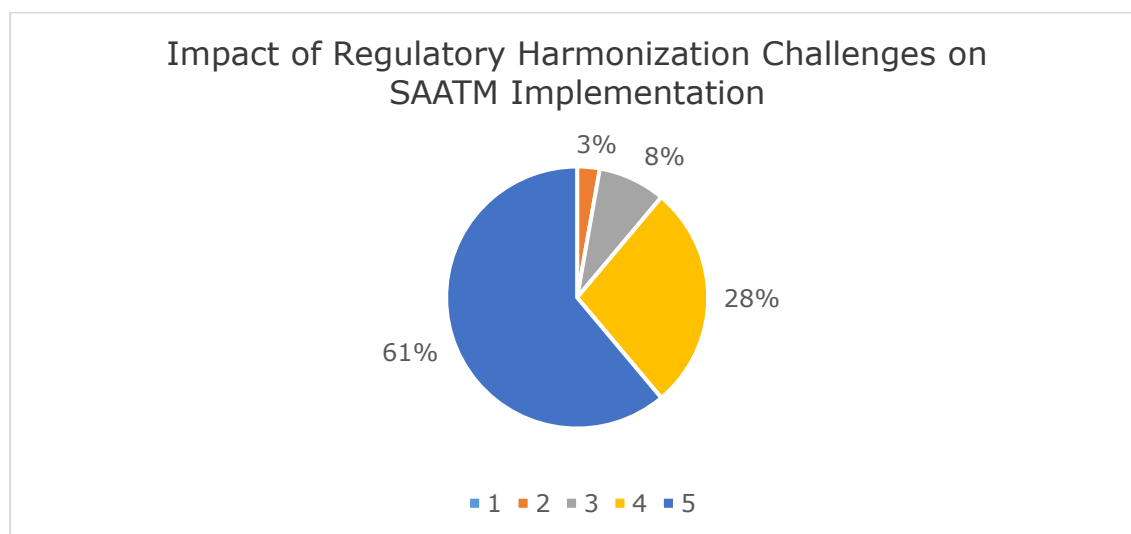


Figure 8: Impact of regulatory harmonization challenges on SAATM implementation

As illustrated in *Figure 8*, the majority of respondents (89%) rated the significance of the lack of regulatory harmonization as 4 or 5. This indicates a strong perception of this issue as a critical challenge. Specifically, 32 out of 36 respondents rated it as either 4 or 5, reflecting widespread recognition of the problem's severity. This high rating suggests that there are inconsistencies in regulatory frameworks, which is a substantial barrier to the successful implementation of SAATM.

4.2.2.2 Regional patterns based on impact of regulatory harmonization

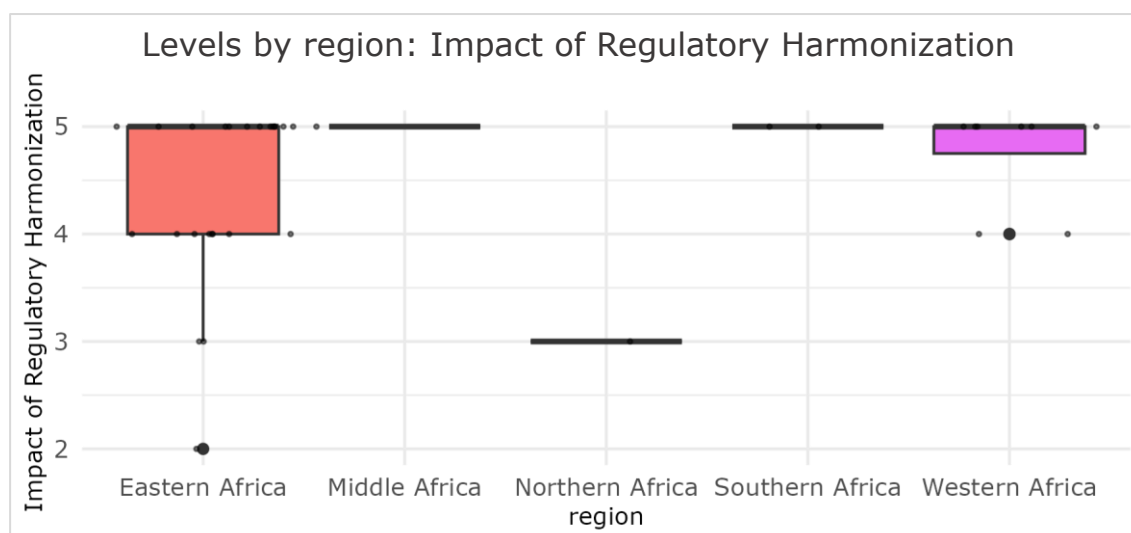


Figure 9: Impact of regulatory harmonization challenges on SAATM implementation by region

The responses from East African countries generally reflect high concern about regulatory harmonization, as shown in Figure 9. This suggests that East African nations, which are pivotal in regional integration efforts, view regulatory inconsistencies as a significant hurdle.

Respondents from West African countries also showed a high level of concern. This highlights a shared perception of the critical impact of regulatory differences. The consistent high ratings from this region reinforce the idea that West African countries face substantial challenges in aligning their aviation regulations.

Southern African countries, also expressed a strong sense of the challenge, that regulatory harmonization is seen as extremely significant in these nations. The responses from Central African nations are less frequent but show a similar trend.

4.2.2.3 Demographic patterns based on impact of regulatory harmonization

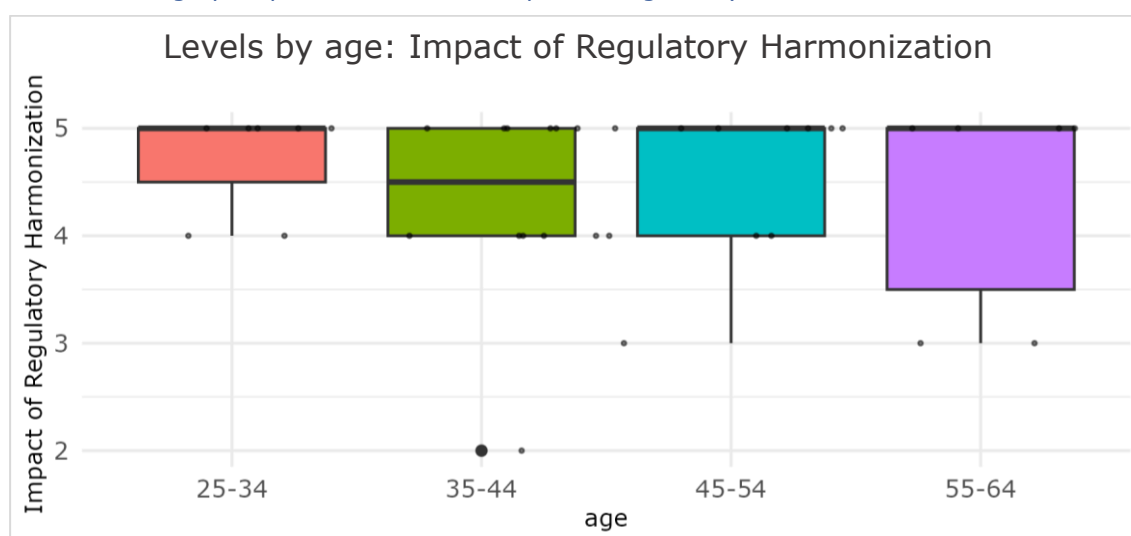


Figure 10: Impact of regulatory harmonization challenges on SAATM implementation by age

There is a notable consistency in the high ratings given to the significance of regulatory harmonization across various age groups, as indicated by Figure 10. Respondents from all different age brackets demonstrated a similar level of concern, with no significant variations in their ratings. This suggests that the challenge of regulatory harmonization is perceived uniformly across different age demographics.

4.2.2.4 Socio-economic patterns based on impact of regulatory harmonization

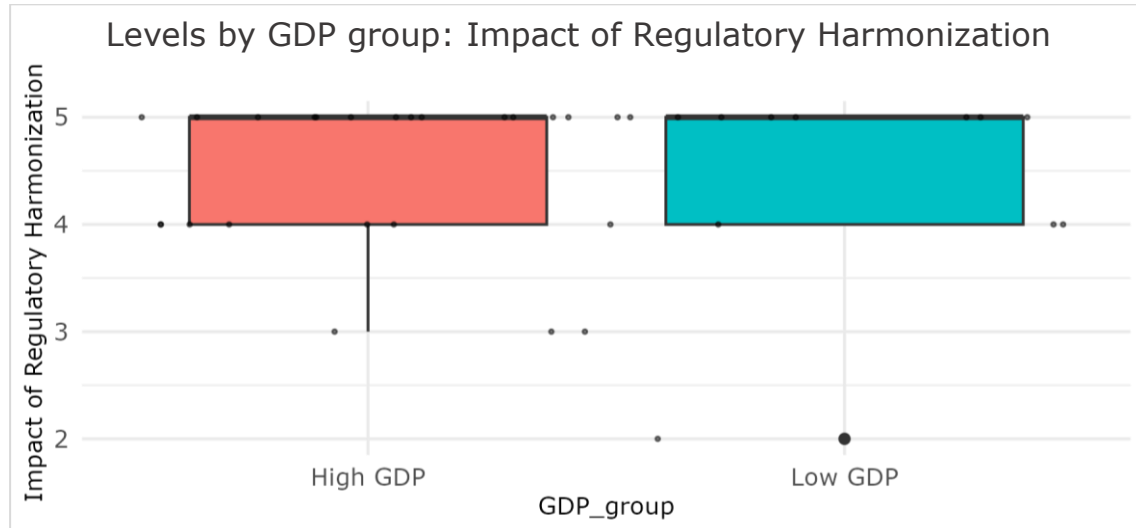


Figure 11: Impact of regulatory harmonization challenges on SAATM implementation by GDP group

Respondents from both high GDP and low GDP groups consistently rate the significance of this challenge between 3 and 5, as shown in Figure 11. The high GDP group predominantly gives ratings of 4 and 5, indicating a high level of concern. Similarly, the low GDP group also shows ratings mainly at 4 and 5, with few exceptions. There is a clear consensus across both GDP groups that the lack of regulatory harmonization is a significant challenge for SAATM implementation.

4.2.3 Rating of major operational challenges

Respondents were requested to rate the biggest operational challenge in the implementation of SAATM. The response are shown in figure 12.

4.2.3.1 Rating of Commonly Identified Challenges in SAATM implementation.

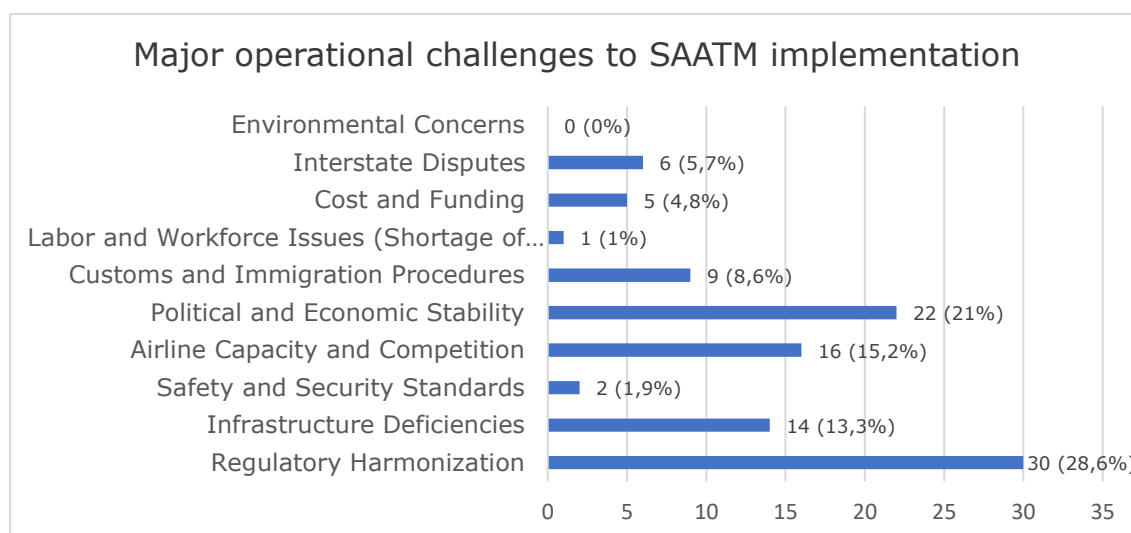


Figure 12: Major operational challenges to SAATM implementation

As illustrated in Figure 12, the predominant challenge was regulatory harmonization (28.6%). This rating confirms the previous responses by respondents on this issue, indicating it is a universal concern. The need for a consistent regulatory framework is critical, as discrepancies in national regulations create barriers to seamless air transport operations. Without harmonized regulations, airlines face difficulties in navigating different legal landscapes. This leads to inefficiencies and increased operational costs.

Political and economic stability (21%) was another recurring theme in the response. Stable political environments and robust economic conditions are essential for the successful implementation of SAATM. Political instability and economic volatility can prevent investment in the aviation sector and disrupt ongoing operations, undermining the goals of the initiative.

Airline capacity and competition (15.2%) were also rated as significant concerns. The ability of African airlines to compete with more established carriers is questioned, with limited resources and smaller fleets posing challenges. Increased competition from foreign airlines could potentially overwhelm local carriers, which are already struggling with capacity issues. Ensuring fair competition and supporting the growth of African airlines are crucial for the sustainability of SAATM.

Infrastructure deficiencies (13.3%) was also regarded as a major challenge. The lack of adequate airport facilities and insufficient supporting infrastructure impede the efficient movement of passengers and goods. These deficiencies affect the operational efficiency of airlines and the overall passenger experience, making air travel less attractive.

Interstate disputes (5.7%) were considered barriers to SAATM's implementation as well. Conflicts and disagreements between member states can delay progress and create uncertainties. Effective conflict resolution mechanisms and fostering cooperation among states are necessary to overcome these challenges.

Customs and immigration procedures (8.6%) were also evaluated as important operational challenges. Streamlining these processes is essential for facilitating smoother and faster passenger and cargo movements across borders. Bureaucratic hurdles and inefficient procedures can lead to delays and increased operational costs.

Cost and funding issues (4.8%) were considered as contributors to the challenges by respondents. Securing adequate financing for infrastructure development and operational needs is vital. Without sufficient funding, it is challenging to maintain and expand air transport services.

Safety and security standards, labor and workforce issues, and environmental concerns across states also received a lower rating. However, ensuring high safety standards and addressing workforce shortages, particularly the lack of skilled personnel, are crucial for maintaining safe and reliable air transport services.

4.2.3.2 Regional patterns based on major operational challenges

The analysis revealed that regulatory harmonization and political and economic stability are universal concerns for the implementation of the SAATM across all regions. Beyond these shared issues, different regions prioritize additional specific challenges.

4.2.3.3 Socio-economic patterns based on major operational challenges

High GDP countries exhibit a range of challenges from regulatory to financial issues. These countries have complex and varied responses, reflecting their diverse economic contexts and relatively developed aviation sectors. Conversely, lower GDP countries emphasized basic financial constraints, infrastructural issues, and resource constraints. The economic disparity affects these countries' capacity to engage effectively with SAATM.

4.2.4 Rating of the primary hindrance to BASA compliance

Respondents were requested to rate what they perceived as the biggest hindrance to BASA compliance in the implementation of SAATM?

4.2.4.1 Rating of the primary hindrance to BASA compliance

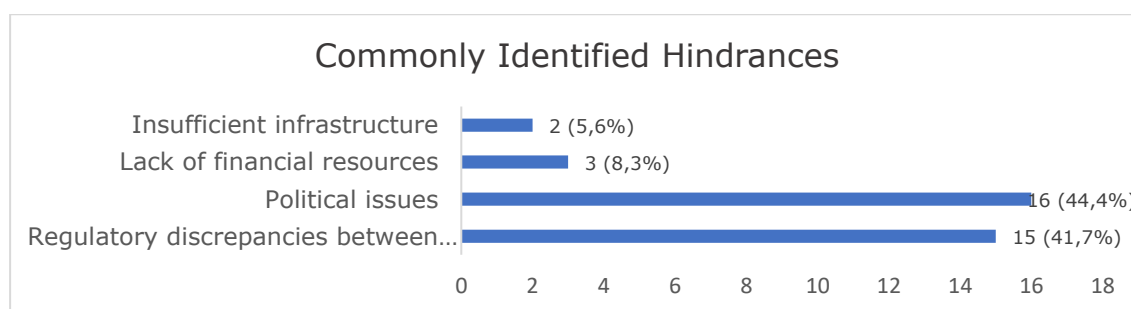


Figure 13: Rating of Primary hindrance to BASA compliance in SAATM implementation

Figure 13 demonstrates that the primary hindrances to BASA compliance in the implementation of the SAATM are political issues (44.4%) and regulatory discrepancies between countries (41.7%).

Political issues emerged as the most significant hindrance, mentioned by 44.4% by respondents. This challenge was noted across a diverse range of countries. Respondents from multiple age groups consistently pointed to political challenges, indicating a broad recognition of how political dynamics can impede compliance with BASA requirements.

Regulatory discrepancies between countries were also identified as a major hindrance by respondents (41.7%). The prevalence of this concern across various national contexts underscores the difficulties in achieving regulatory harmonization, which is crucial for the seamless implementation of SAATM.

The lack of financial resources was rated at 8.3%. This hindrance reflects the financial constraints faced by some countries in meeting the requirements of BASA and investing in the necessary infrastructure and regulatory frameworks.

Insufficient infrastructure was rated by respondents at 5.6%. This issue highlights the need for substantial investments in aviation infrastructure to support the effective implementation of SAATM and compliance with BASA.

4.2.4.2 Demographic patterns based on rating of the primary hindrance to BASA compliance

In terms of age demographics, political issues were a common concern across all age groups, indicating a widespread perception of political dynamics as a significant barrier. Regulatory discrepancies were notably mentioned by respondents aged 35-44 and 55-64. Individuals in these age groups, who might be more experienced or hold decision-making positions, recognize the importance of regulatory alignment.

4.2.5 Rating of the impact of higher airfares

The respondent were requested to rate the impact of higher airfares in relation to implementation of SAATM. The impact of higher airfares on the implementation of the SAATM was rated by respondents on a scale from 1 to 5, with 1 indicating the least impact and 5 indicating the highest impact. The responses provided insight into how significant this issue is perceived across different countries and age groups.

4.2.5.1 Rating of the impact of higher airfares

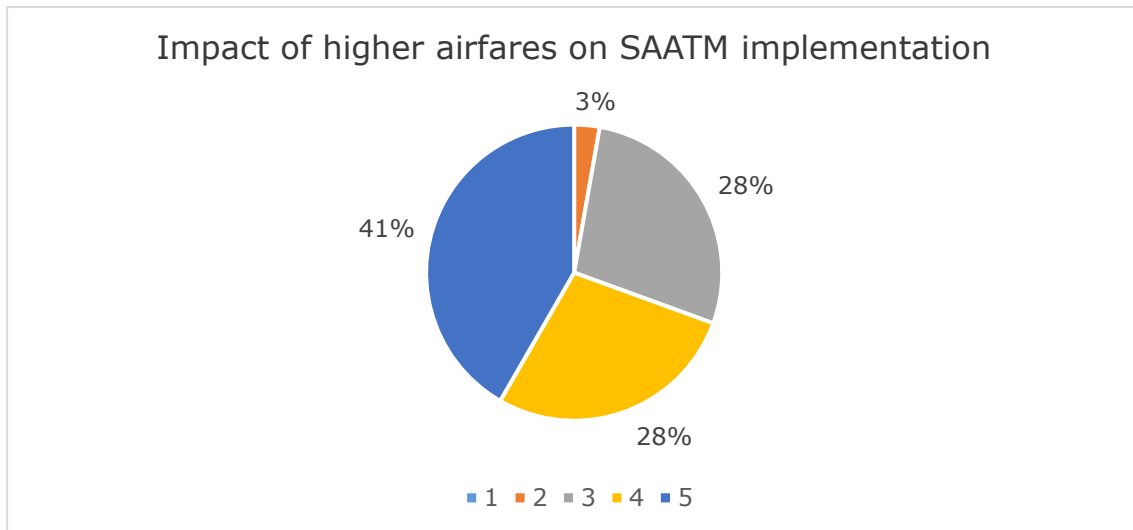


Figure 14: Impact of impact higher airfares on SAATM implementation

As shown in Figure 14, no respondents rated the impact as 1. This indicates that everyone acknowledges at least some influence of higher airfares on SAATM implementation. Only 2,8% of respondents rated the impact as 2, suggesting minimal influence. Both a moderate impact (3) and high impact (4) was rated by 28% of respondents. The highest impact rating of 5 was chosen by 41% of respondents.

Most respondents perceived higher airfares as a substantial barrier to the successful implementation of SAATM. With 25 out of 36 participants rating the impact as 4 or 5, it is evident that elevated air travel costs are seen as a significant obstacle. This perception likely arises from the understanding that higher airfares can deter passenger traffic numbers, reduce market accessibility, and ultimately hinder the growth and integration goals of SAATM. By making air travel less affordable, higher fares can limit the benefits of increased connectivity and economic integration that SAATM aims to achieve. This highlights the need for strategies to manage and potentially reduce air travel costs within the African aviation market.

4.2.5.2 Regional patterns based on rating of the impact of higher airfares

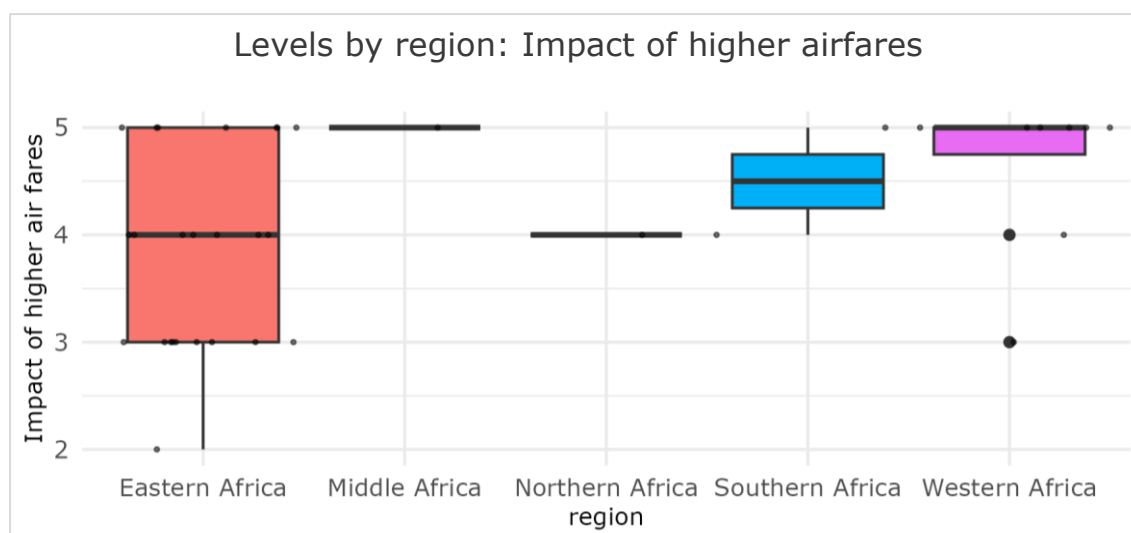


Figure 15: Impact of higher airfares on SAATM implementation by region

As illustrated in Figure 15, Eastern Africa exhibits a diverse range of responses, with ratings spanning from 2 to 5. The majority of responses cluster around moderate to high impact levels. Overall, Eastern Africa reflects a consensus that higher airfares pose a moderate to significant barrier to SAATM implementation.

In Middle Africa, the impact of higher airfares was rated as a significant obstacle to SAATM implementation. Northern Africa rated the impact as major impact. This indicates that higher airfares are considered a high-impact factor, underscoring the region's concern regarding the cost of air travel. Southern African ratings indicated that higher airfares are viewed as a substantial barrier to the implementation of SAATM in this region.

Western Africa shows a pattern of significant concern over higher airfares. It can be concluded that stakeholders perceive higher airfares as a major impediment to SAATM, with a strong consensus around its substantial impact.

While all regions acknowledge the impact of higher airfares on SAATM implementation, the degree of perceived impact varies. Eastern Africa shows a range from moderate to significant impact, Middle Africa and Northern Africa emphasize significant impact, and Southern and Western Africa consistently rate the impact as substantial.

4.2.5.3 Demographic patterns based on rating of the impact of higher airfares

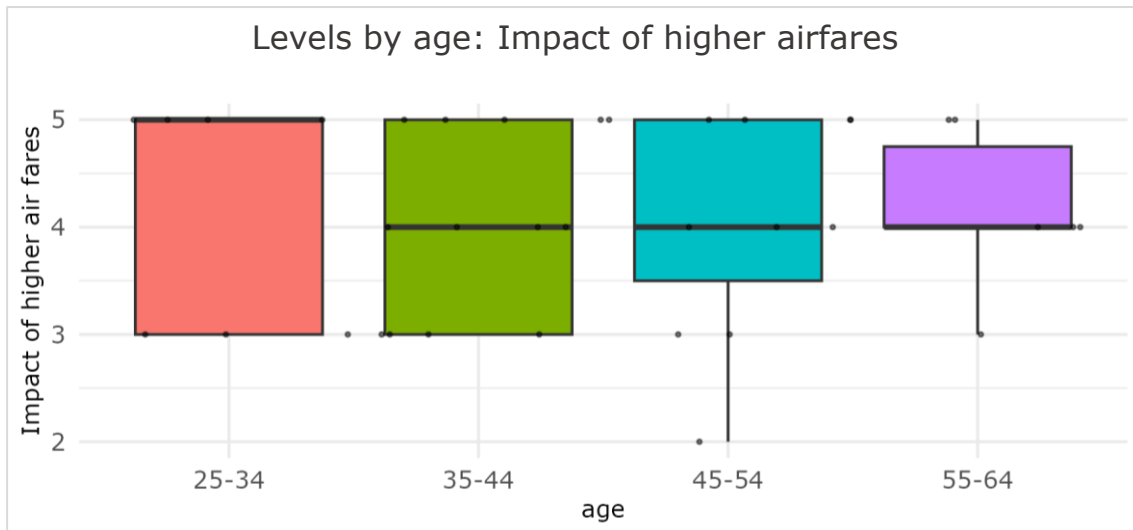


Figure 16: Impact of higher airfares on SAATM implementation by age

Revealed in Figure 16, there is a clear consensus across all age groups that higher airfares substantially impact the implementation of SAATM, with most respondents rating the impact between 3 and 5. This uniformity highlights the common recognition of airfare costs as a critical barrier to the market's successful integration and implementation.

4.2.5.4 Socio-economic patterns based on rating of the impact of higher airfares

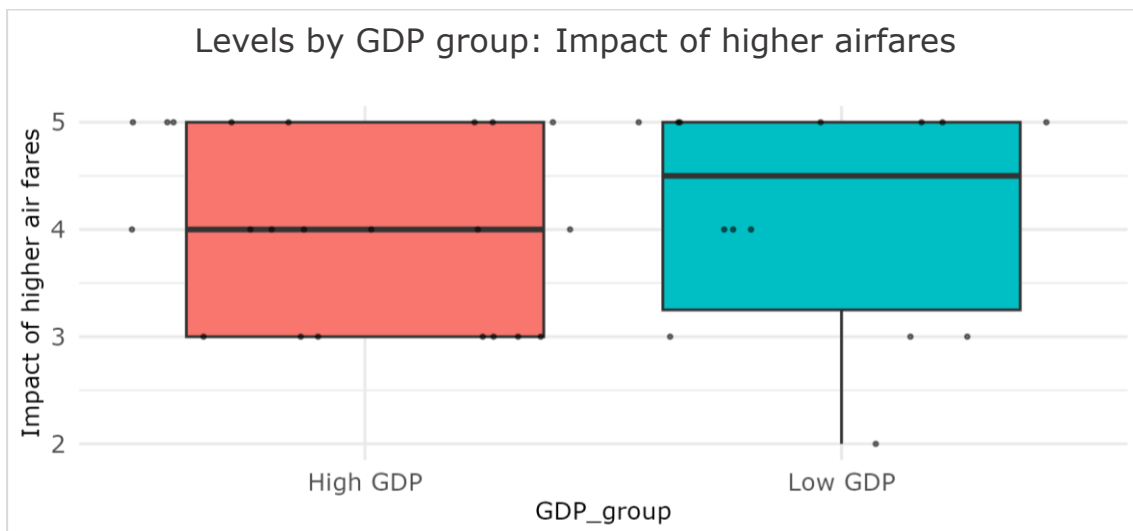


Figure 17: Impact of higher airfares on SAATM implementation by GDP group

Figure 17 reveals a consensus across different GDP groups. Both high and low GDP groups consistently rated the impact of higher airfares between 3 and 5. This indicates a general agreement that higher airfares significantly impact the implementation of SAATM, regardless of the economic standing of the respondents' countries.

4.3 Factors contributing to a favorable environment for SAATM implementation

Implementing the SAATM carries significant implications for the aviation sector and the broader economy in Africa. This section explores the potential impacts of SAATM on various facets such as economic growth, airfare affordability and connectivity.

4.3.1 Connectivity and integration across Africa

The respondents were requested to rate the impact of the implementation of SAATM on connectivity and integration across Africa.

The impact of the SAATM on connectivity and integration across Africa was rated by respondents on a scale from 1 to 5, with 1 indicating the least impact and 5 indicating the highest impact. The responses provide insight into how significant this issue is perceived across different countries and age groups.

4.3.1.1 Impact on connectivity and integration across Africa

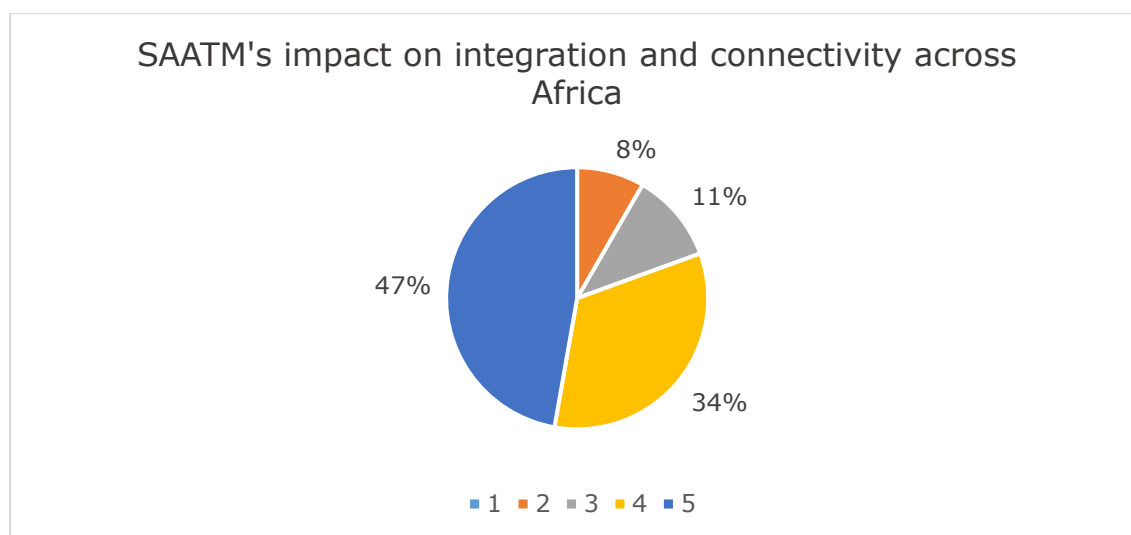


Figure 18: SAATM's impact on integration and connectivity across Africa

As shown in *Figure 18*, responses are predominantly clustered at the higher end of the scale, with 17 respondents rating the impact as 5 (47%) and 12 rating it as 4 (34%). This suggests that a significant portion of stakeholders (81%) believe SAATM will greatly enhance connectivity and integration across the continent. Fewer responses fall at the lower end, with only 3 respondents rating the impact as 2, and none rating it as 1.

The consensus reflects a general belief that substantial benefits of SAATM for improving Africa's air transport connectivity and fostering regional integration. This underscores its potential as a transformative initiative for the continent's aviation industry..

4.3.1.2 Regional patterns based on impact on connectivity and integration across Africa

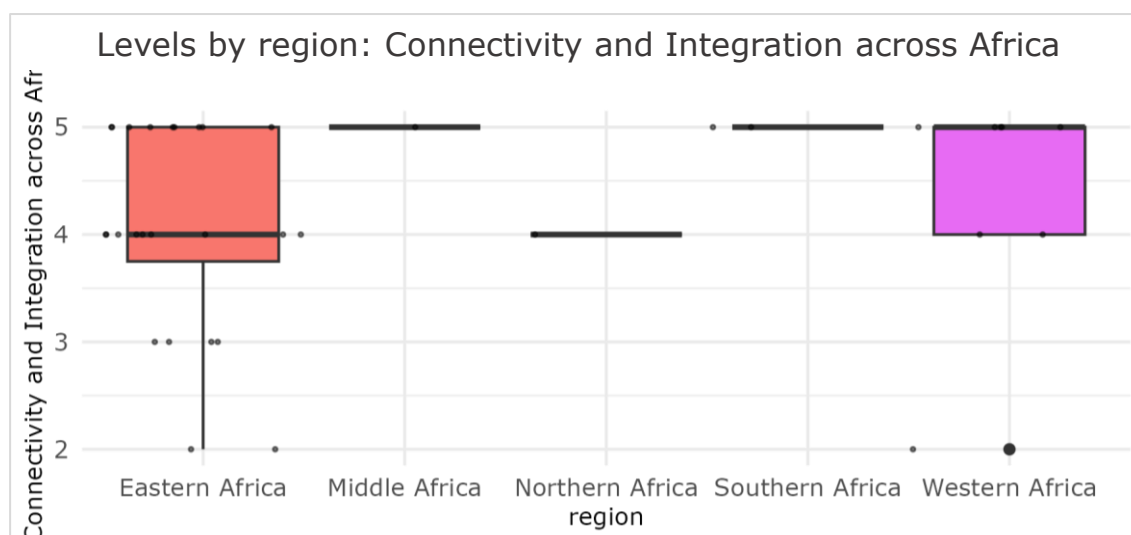


Figure 19: SAATM's impact on integration and connectivity across Africa by region

Respondents from Eastern Africa, Western Africa, Southern Africa, Middle Africa, and Northern Africa predominantly rate the impact between 3 and 5, as illustrated in Figure 19. The majority of responses fall at the higher end of the scale, with numerous ratings of 4 and 5, indicating a strong belief in SAATM's positive effect on connectivity and integration. This pattern indicates widespread agreement across regions that SAATM will significantly enhance connectivity and integration across Africa.

4.3.1.3 Demographic patterns based on impact on connectivity and integration across Africa

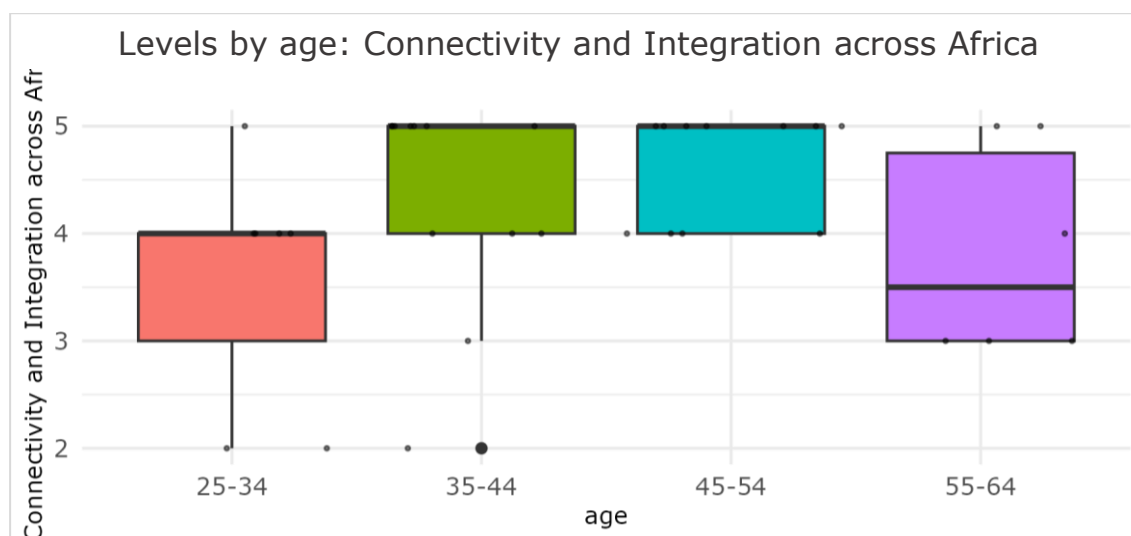


Figure 20: SAATM's impact on integration and connectivity across Africa by age

As illustrated in Figure 20, the age groups 35-44 and 45-54 showed a strong inclination towards high ratings (5 and 4), indicating a perception of significant positive impact. The 55-64 age group displayed more moderate ratings, suggesting varying views within older demographics.

4.3.1.4 Socio-economic patterns based on impact on connectivity and integration across Africa

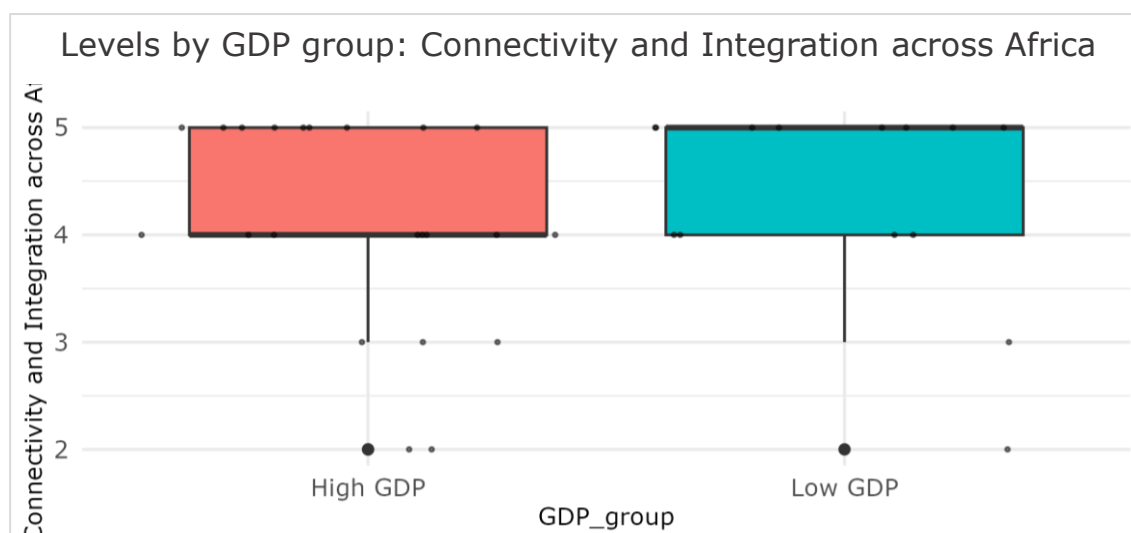


Figure 21: SAATM's impact on integration and connectivity across Africa by GDP group

Both high and low GDP groups rate the impact predominantly between 3 and 5, as indicated by Figure 21. The high GDP group shows a wide range of ratings, including several lower scores of 2, but also a strong concentration of ratings at 4 and 5. The low GDP group similarly exhibits high ratings, with a strong presence of 4 and 5, and fewer lower ratings. There is a clear consensus across both GDP groups that SAATM is expected to significantly enhance connectivity and integration across Africa, despite some variability in the high GDP group.

4.3.2 Regional connectivity and integration

Respondents were requested to rate how SAATM has impacted regional integration and connectivity among African countries.

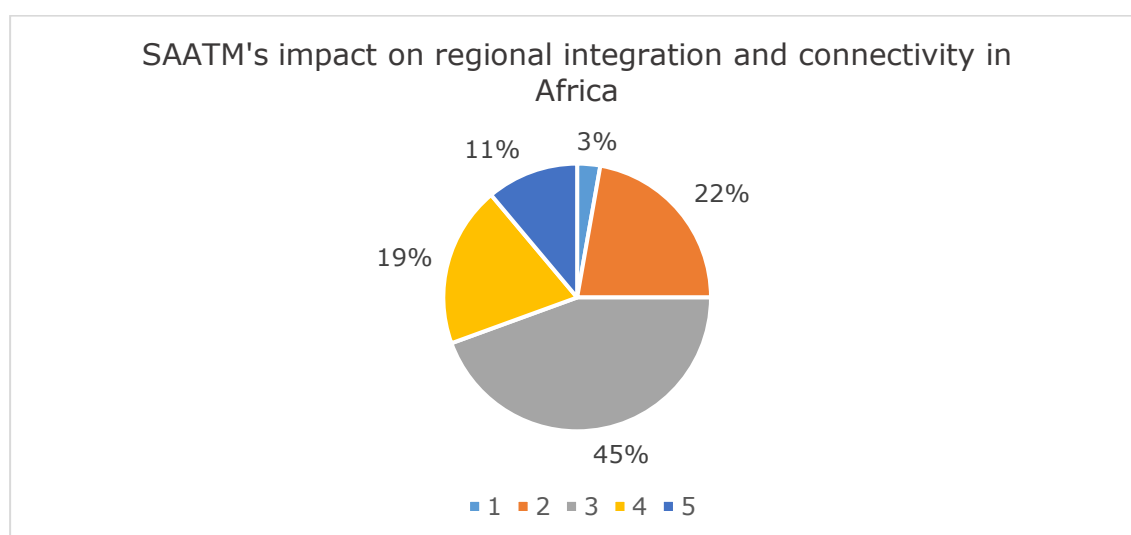


Figure 22: SAATM's impact on regional integration and connectivity in Africa

The impact of the SAATM on regional integration and connectivity was rated on a scale from 1 to 5 by respondents from various countries and age groups. The responses highlight diverse perspectives, with clear patterns emerging across different nationalities and age demographics.

4.3.2.1 Impact on regional connectivity and integration

As shown in Figure 22, the majority of respondents, namely 45%, rated the impact as 3. This moderate rating was prevalent across a wide range of countries. This indicates a cautious optimism about SAATM's effect on regional integration and connectivity.

A rating of 4 was given given by 19,4% of respondents. This rating highlights a relatively higher optimism about the positive impact of SAATM on regional integration and connectivity within this group. Some respondents rated the impact as 5 (11.1%), indicating a strong belief in the significant positive effect of SAATM on regional integration and connectivity. Ratings of 2 were given by 8 respondents (22.2%). This reflects skepticism about the extent of SAATM's impact on regional integration and connectivity in these regions. Only one respondentrated the impact as 1 (2.8%), indicating a belief that SAATM has had minimal impact on regional integration and connectivity.

4.3.2.2 Regional patterns based on impact on regional connectivity and integration

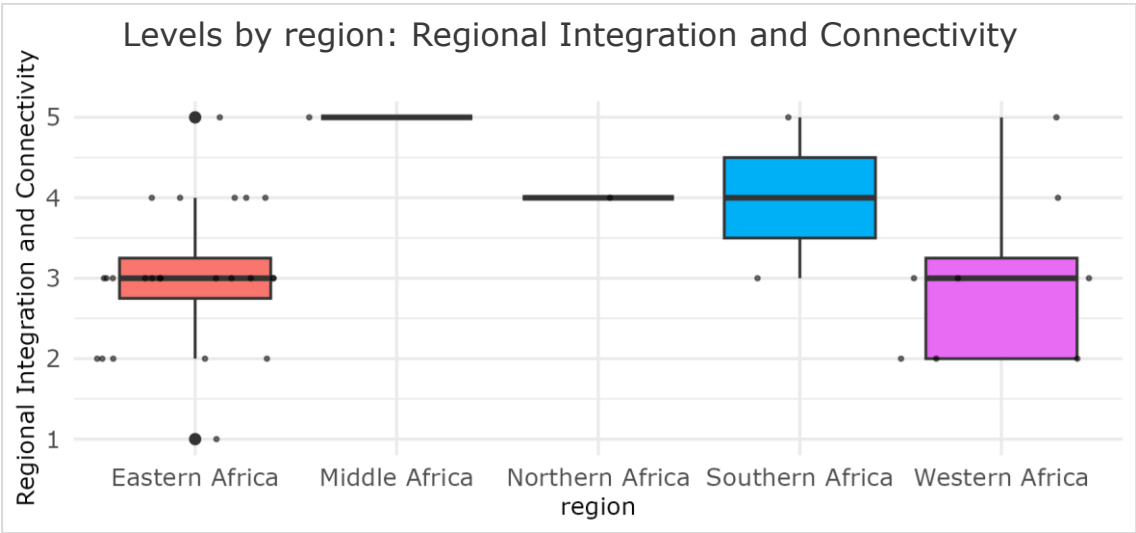


Figure 23: SAATM's impact on regional integration and connectivity in Africa by region

Most regions report a wide range of ratings, as illustrated in Figure 23. Eastern Africa shows a concentration of mid-range scores (mostly 3 and 2), indicating cautious optimism. Southern Africa presents a more positive outlook. Middle Africa also has a high rating. Western Africa's responses are rather mixed. Northern Africa's response is more optimistic, with a rating of 4.

Overall, while there is variability in the responses, the general trend suggests a consensus of moderate to positive impact on regional integration and connectivity, with regional differences in the level of optimism.

4.3.2.3 Demographic patterns based on impact on regional connectivity and integration

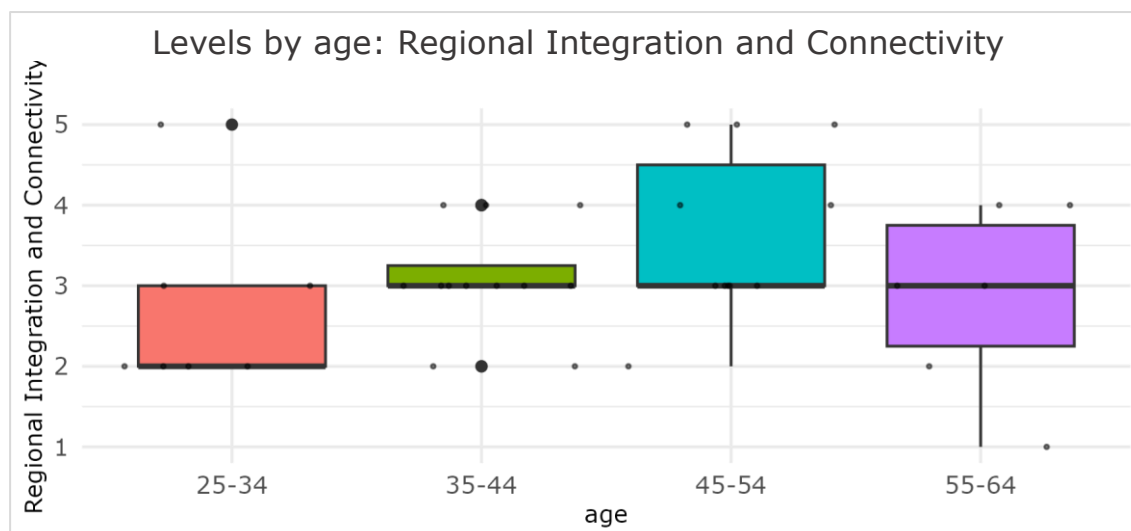


Figure 24: SAATM's impact on regional integration and connectivity in Africa by age

The results in Figure 24 reveal that younger age groups (25-34) and older groups (55-64) exhibit some variation. Both are showing lower ratings (1-2) and higher ratings (5), indicating a broad spectrum of opinions. The majority of ratings are concentrated around 3 and 4. This suggests a general consensus that SAATM has a moderate to positive impact on regional integration and connectivity.

4.3.2.4 Socio-economic patterns based on impact on regional connectivity and integration

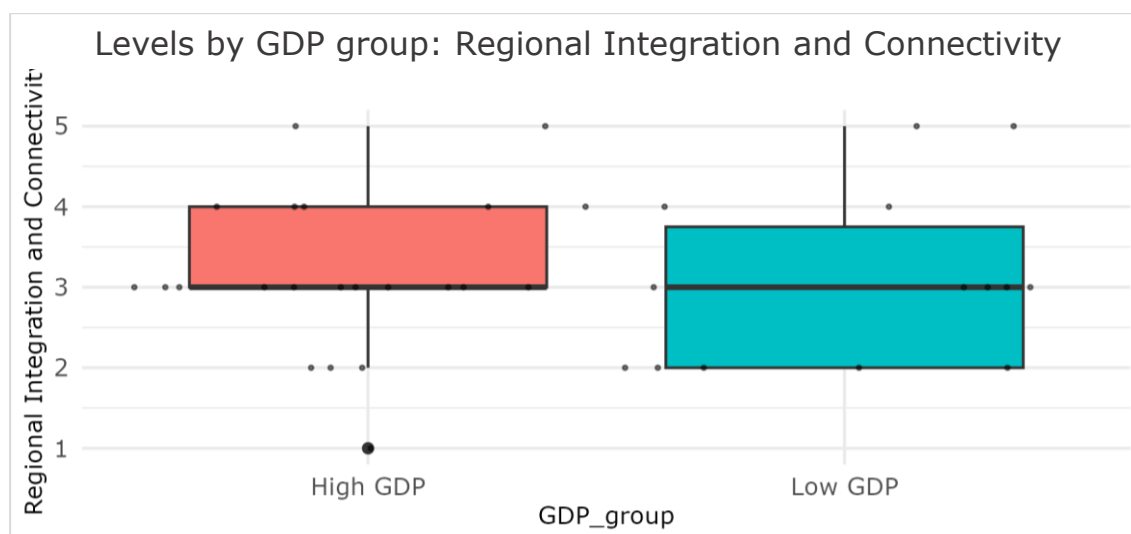


Figure 25: SAATM's impact on regional integration and connectivity in Africa by GDP group

The results in Figure 25 reveal that respondents from high GDP countries frequently rated the impact at a range of 3 to 5, with a noticeable concentration of higher ratings (4 and 5). This suggests a generally positive perception among higher GDP countries. It indicates that SAATM is seen as having a meaningful impact on regional integration and connectivity in these contexts.

Conversely, respondents from low GDP countries provided more varied ratings, with a notable number indicating lower ratings (1 to 3). This reflects a more cautious or less optimistic view of SAATM's impact in these regions. The frequency of lower ratings among low GDP countries suggests that the benefits of SAATM might be perceived differently compared to high GDP countries.

4.3.3 Economic growth and prosperity

Question 8: Rate the potential positive impact of SAATM on economic growth and prosperity on a scale of 1 to 5.

The potential positive impact of the SAATM on economic growth and prosperity was rated on a scale from 1 to 5 by respondents from various countries and age groups. The responses highlight a generally positive outlook with some variations across different nationalities and age groups.

4.3.3.1 Impact on economic growth and prosperity

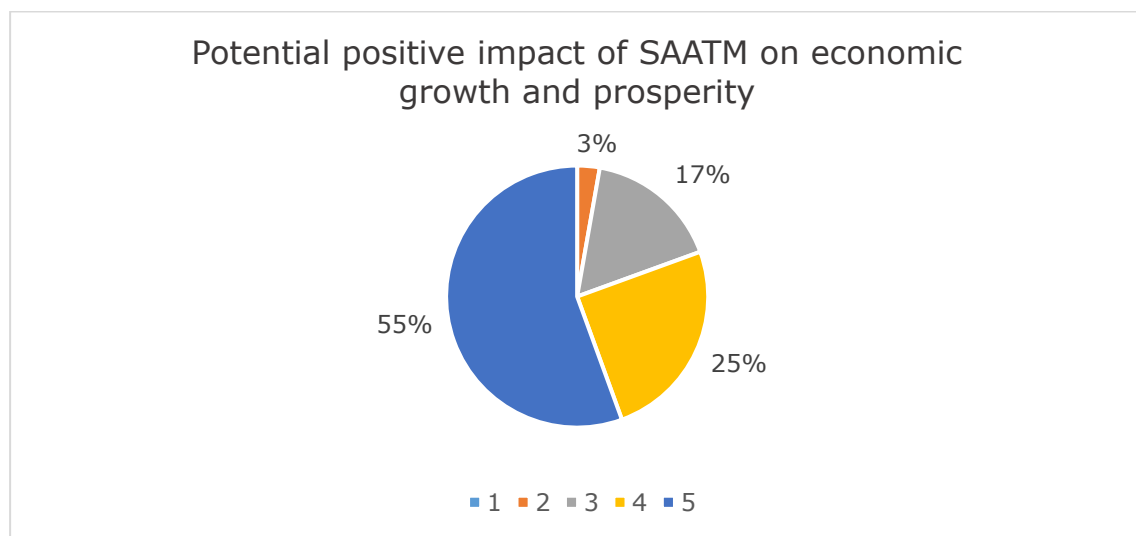


Figure 26: Potential positive impact of SAATM on economic growth and prosperity

As shown in *Figure 26*, a significant portion of respondents, 20 out of 36 (55.6%), rated the impact as 5. This rating reflects strong confidence in SAATM's potential to drive economic growth and prosperity.

Additionally, 9 respondents (25%) rated the impact as 4. This rating shows moderate to high optimism about SAATM's benefits. This highlights a substantial belief in the economic advantages SAATM could bring.

A moderate rating of 3 was given by 6 out of 36 respondents (16.7%). This rating suggests a cautious optimism, recognizing the potential benefits of SAATM without viewing them as wholly transformative.

4.3.3.2 Regional patterns based on impact on economic growth and prosperity

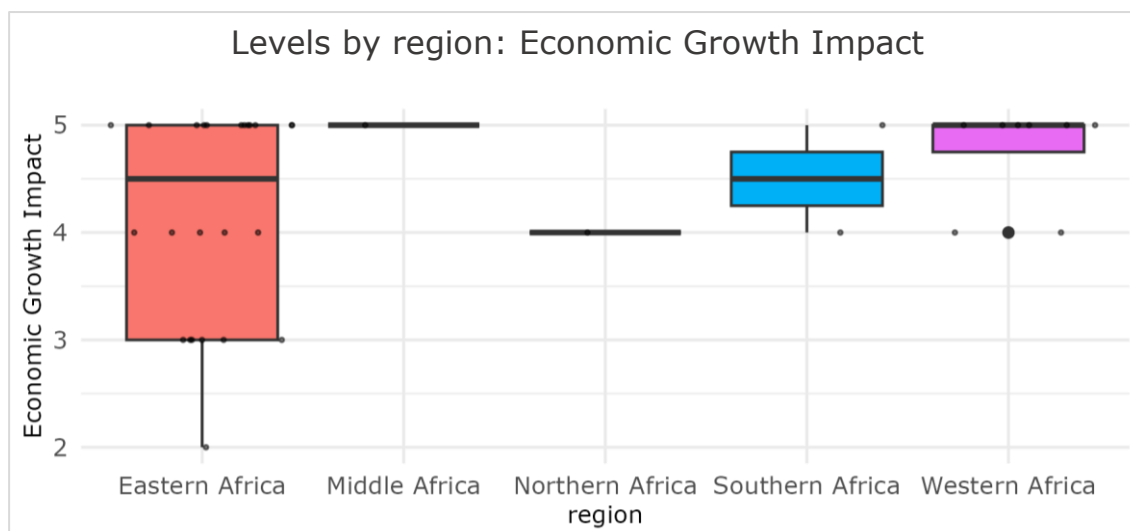


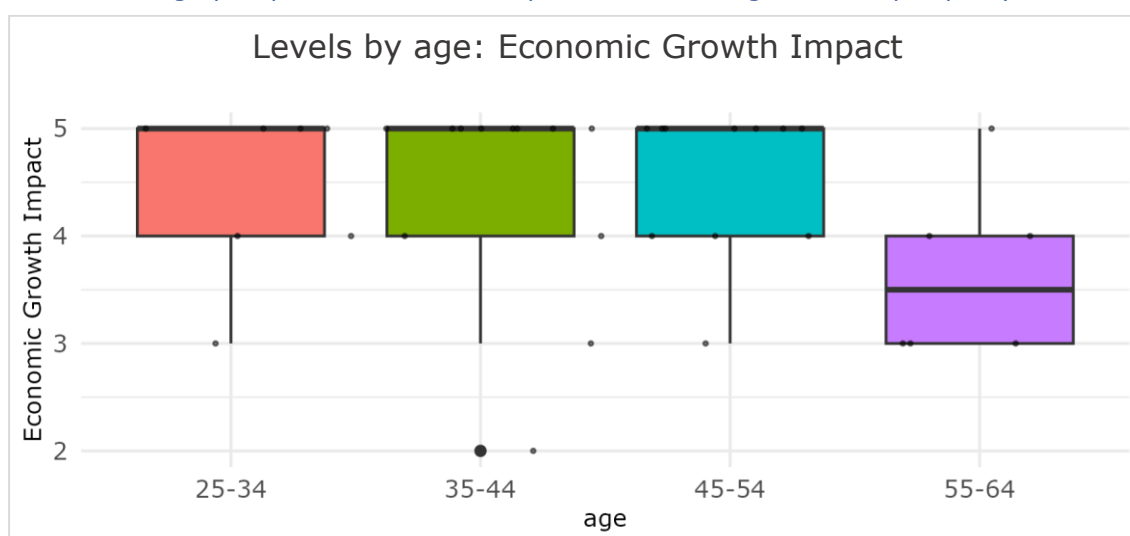
Figure 27: Potential positive impact of SAATM on economic growth and prosperity by region

Indicated by Figure 27, there is a strong consensus on the positive impact of SAATM in Eastern Africa. Many respondents rated the impact between 4 and 5. This suggests a shared belief that SAATM significantly enhances economic growth and regional integration in this region. However, there is a notable exception, where some respondents rated the impact lower, indicating mixed feelings within the region.

Western African countries also show a positive perception of SAATM's impact. Respondents from these countries frequently rated the impact as 5, reflecting strong confidence in SAATM's role in promoting economic growth and regional connectivity.

Southern Africa and Middle Africa demonstrate a similar trend, with respondents indicating high ratings. This suggests that the benefits of SAATM are recognized and valued in this region as well.

4.3.3.3 Demographic patterns based on impact on economic growth and prosperity



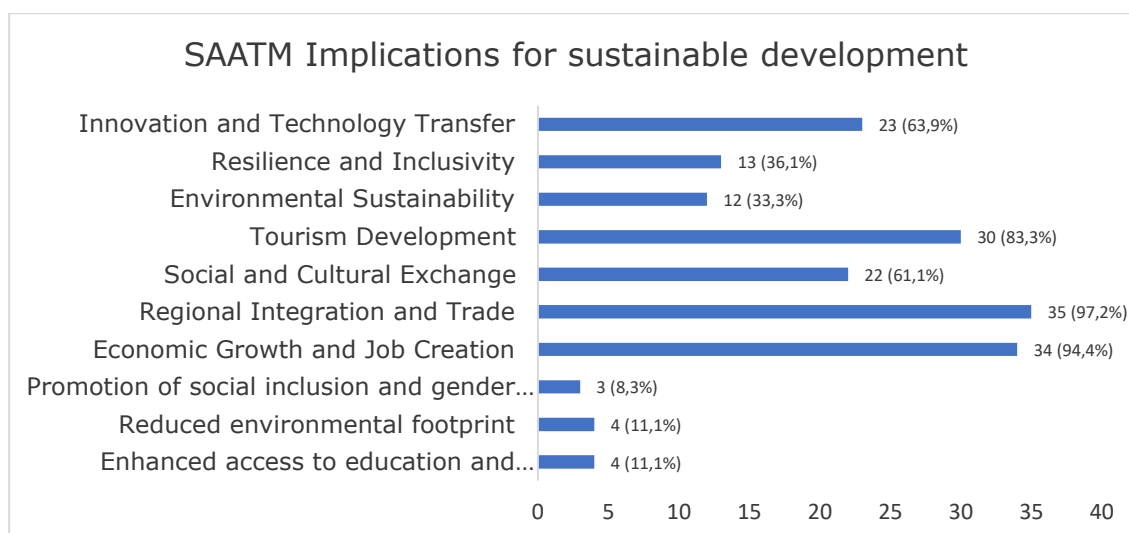


Figure 30: Implications of SAATM establishment for sustainable development

The survey aimed to identify the most significant implications of the SAATM for sustainable development. Respondents were asked to select five options from a provided list. The results shown in *Figure 30*, highlight various perceived benefits, with “Economic Growth and Job Creation”, “Regional Integration and Trade”, and “Tourism Development” being the most frequently selected.

4.3.4.1 Commonly identified implications for sustainable development

When analyzing the provided options, several themes emerge prominently. “Economic Growth and Job Creation”, “Regional Integration and Trade”, and “Tourism Development” are recurrently highlighted as significant implications of the SAATM for sustainable development. These options appear frequently across various countries and demographics, indicating their broad relevance. “Innovation and Technology Transfer” and “Social and Cultural Exchange” also appear multiple times but are less consistently noted compared to the three primary options. This frequency pattern underscores the widespread recognition of SAATM's potential to boost economic and trade activities across the continent.

4.3.4.2 Regional patterns based on identified implications for sustainable development

The implications of SAATM that are consistently valued across all regions include “Economic Growth and Job Creation”, “Regional Integration and Trade”, and “Tourism Development”. These elements are universally recognized as crucial benefits of SAATM for enhancing regional development and connectivity.

Building on these shared priorities, each region highlights unique pivotal points based on their specific contexts. In Eastern Africa, there is a notable emphasis on Innovation and “Technology Transfer and Environmental Sustainability”. Western Africa places a stronger emphasis on “Social and Cultural Exchange”, indicating a focus on cultural connectivity and social cohesion. Southern Africa prioritizes “Resilience and Inclusivity”, pointing to a concern for building adaptable and inclusive societies alongside fostering economic benefits.

4.3.4.3 Demographic patterns based on identified implications for sustainable development

The implications of SAATM also vary by age group. For individuals aged 25-34, there is a strong emphasis on "Economic Growth and Job Creation", "Regional Integration and Trade", and "Innovation and Technology Transfer". This age group is notably forward-looking, indicating a focus on long-term growth and technological advancements. In the 35-44 age group, "Economic Growth and Job Creation" remains central, but there is also a significant focus on "Environmental Sustainability" and "Social and Cultural Exchange". The 45-54 and 55-64 age groups often highlight "Social and Cultural Exchange", "Tourism Development", and "Resilience and Inclusivity". These choices imply a greater focus on quality of life, cultural engagement, and sustainable practices.

4.3.4.4 Socio-economic patterns based on identified implications for sustainable development

The impact of SAATM also shows distinct patterns based on GDP groups. High GDP countries frequently emphasize "Economic Growth and Job Creation", "Regional Integration and Trade", and "Tourism Development". They also tend to include "Innovation and Technology Transfer" and "Environmental Sustainability", reflecting a balanced focus on growth, technology, and sustainability. In contrast, Low GDP countries prioritize "Economic Growth and Job Creation" and "Regional Integration", with less frequent mentions of "Tourism Development" and "Environmental Sustainability". This difference highlights how economic status influences developmental priorities. Higher GDP countries integrate more diverse and advanced implications of SAATM, while lower GDP countries focus more on fundamental economic improvements and trade benefits.

4.3.5 Unintended consequences

The respondents were further requested to highlight any unintended consequences (positive or negative) resulting from SAATM.

The implementation of the SAATM has led to various unintended consequences, both positive and negative. A detailed analysis based on the collected responses reveals key patterns and insights.

4.3.5.1 Positive unintended consequences

Several respondents highlighted that SAATM has facilitated employment creation and economic growth by enhancing connectivity, promoting trade, and attracting investment. This is seen in statements such as "Positive-Employment creation and ease of travel" and "Positive impacts include lower fares and better connectivity." Improved air connectivity across the continent, resulting in more direct flights and better accessibility for passengers and cargo, has also been noted.

Enhanced connectivity is said to promote trade, tourism, and investment. This contributes to economic growth by creating jobs, boosting local businesses, and attracting foreign investment. Respondents mentioned specific benefits such as lower fares, better connectivity, and new city pairs being established, improving travel options within Africa.

Some respondents highlighted the positive effect of increased competition among airlines, leading to better services and competitive pricing. One respondent mentioned that "competition has led to the failure or consolidation of smaller airlines, reducing market diversity and potentially leading to monopolistic behaviors by dominant players," indicating a dual effect of competition. Additionally,

SAATM has promoted more multilateral air service agreements, contributing to a more integrated and cooperative air transport sector.

4.3.5.2 Negative unintended consequences

On the negative side, increased competition has posed challenges for smaller and newer airlines, leading to potential market consolidation and reduced diversity. Statements like "A small and new incomer national operator couldn't face challenges within SAATM" and "Smaller airlines may struggle to compete with larger carriers" highlight these difficulties.

Another issue is the strain on existing airport infrastructure due to the surge in air traffic, causing delays and congestion. Harmonizing safety and security standards across diverse countries remains a challenge. This is indicated by concerns about inconsistent regulations and oversight potentially compromising passenger safety.

Political rivalry and corruption have also emerged as unintended negative consequences. Some respondents noted that certain countries lag in implementing SAATM fully due to regulatory challenges, political considerations, or protectionist tendencies. This uneven implementation affects the overall impact of SAATM.

Environmental and social issues have been another area of concern. Increased air traffic has led to environmental issues, including pollution and space for damaged aircraft. Social issues such as immigration and crime have also been mentioned.

Some respondents indicated that SAATM has led to slow economic growth in certain areas. Additionally, while many consequences were noted, not all respondents observed significant unintended consequences. Negative responses indicate that not everyone has witnessed notable impacts from SAATM.

4.3.5.3 Specific observations

Some unique responses include a mention of "boost in tourism," and "data share," indicating a variety of impacts across different sectors. One respondent mentioned the challenge of covering "the reality of inside and outside coordination of African countries."

4.3.5.4 Regional patterns based on unintended consequences

The responses reveal distinct patterns across different regions. Eastern Africa and Western Africa show more frequent mentions of both positive and negative consequences. This is likely due to the varying levels of SAATM implementation and economic conditions in these regions. For Eastern Africa, responses often mention improved connectivity and competition, as well as challenges such as regulatory inconsistencies and infrastructure strain. Western Africa responses frequently highlight issues related to smaller airlines struggling to compete and market consolidation. Southern Africa and Northern Africa generally report fewer issues or less detailed impacts. This suggests either a more stable integration or less focus on SAATM's consequences in these areas.

4.3.5.5 Demographic patterns based on unintended consequences

Responses across different age groups suggest that perceptions of SAATM's impact vary, but no clear pattern emerges strictly based on age. Both older and younger respondents report a mix of positive and negative consequences, such as improved connectivity and increased competition leading to market challenges. Younger respondents tend to focus more on direct impacts such as increased competition and tourism boosts. This suggests that while age may influence specific perceptions, the overall experience of SAATM's consequences does not show a strong generational divide.

4.3.5.6 Socio-economic patterns based on unintended consequences

Responses from high GDP countries tend to focus on the positive impacts of SAATM, such as increased connectivity, competitive services, and economic growth. High GDP regions report benefits like improved connectivity and job creation but also face challenges like increased competition and regulatory issues. In contrast, low GDP countries often mention struggles related to market competition and the difficulties faced by smaller or newer airlines. These countries tend to highlight negative consequences such as market consolidation and infrastructural strain. This pattern underscores how the economic status of a country influences the perception and experience of SAATM's impacts. High GDP countries generally experience more benefits and low GDP countries face greater challenges.

4.4 Opportunities that may arise from full SAATM implementation

4.4.1 Strategies to encourage full participation

The respondents were requested to state the strategies that can be employed to encourage more African Union member states to fully participate in SAATM.

To encourage more AU member states to fully participate in the SAATM, various strategies have been proposed by stakeholders. These strategies emphasize training, awareness, advocacy, policy alignment, financial incentives, and infrastructure development.

4.4.1.1 Training and capacity building

One of the most frequently mentioned strategies is the need for comprehensive training and capacity building. This includes providing technical assistance, training programs, and capacity-building initiatives to help countries meet the required aviation standards and regulations. Training and capacity building are essential to equip member states with the necessary skills and knowledge to effectively participate in SAATM.

4.4.1.2 Awareness and advocacy

Another prominent theme is the importance of increasing awareness and conducting advocacy campaigns. Increased awareness seminars, workshops, and other stakeholder engagements are crucial to highlight the benefits and opportunities of SAATM. More awareness can be created by showing each state the concrete benefits they can gain from SAATM. Additionally targeted awareness and advocacy campaigns should be conducted to highlight the economic and social benefits of SAATM. These initiatives can address concerns and misconceptions among policymakers and stakeholders.

Additionally, SAATM's benefits and its potential to enhance the African aviation industry need to be clearly communicated and effectively presented to member states. For example, African airlines currently have only 10% of the market share of African skies. Agenda 2063 envisages a prosperous Africa, which aligns with SAATM. With the expansion of intra-African trade, SAATM would be an accelerator to the continent's economic development.

4.4.1.3 Policy and regulation harmonization

Harmonizing aviation regulations across member states to create a consistent and predictable operating environment is also a critical strategy. This involves aligning safety, security, and operational standards and adopting the AFCAC BASA model. Creating uniform standards and policies facilitates seamless implementation and enhances cooperation among member states.

Additionally, a robust dispute settlement mechanism for SAATM should be established. This mechanism will address conflicts and ensure compliance, fostering confidence among participating states.

4.4.1.4 Financial incentives and support

Financial incentives and support are highlighted as key enablers for encouraging participation. Offering financial incentives, such as funding for infrastructure development and operational subsidies, supports airlines and airports in less developed regions. Public financing is necessary to strengthen the aviation infrastructure and operations in member states.

4.4.1.5 Infrastructure development

Developing and improving aviation infrastructure is also identified as a crucial strategy. Adopting PPP for infrastructure development, providing financial assistance with infrastructure, and standardizing aviation regulations indicate the need for significant investment in the physical and operational capabilities of the aviation sector. African operators should be granted more funding to purchase new aircraft, which would enhance their ability to compete in the market.

4.4.1.6 Political and diplomatic engagement

Engaging political leaders and fostering diplomatic relations is another important strategy. All heads of states should understand and negotiate the framework for SAATM's operationalization. Lobbying through diplomatic engagements ensures high-level political commitment and diplomacy. Under the leadership of the SAATM champion, it is crucial to intensify advocacy to achieve a target of 40 Member States. Regional champions can also advocate at the level of Regional Economic Communities (RECs).

4.4.1.7 Targeted advocacy and sensitization

A targeted approach to advocacy and sensitization is necessary to address specific concerns and misconceptions. This includes sensitizing states and stakeholders to the benefits of SAATM implementation. Focused efforts to inform and persuade stakeholders about the advantages of participating in SAATM are essential. Advocacy on benefits, involving local companies, and clearly communicating why each country should be part of SAATM are vital strategies. Many countries fear that their national airlines may be overtaken by stronger ones. Clear communication of benefits can alleviate these fears.

4.4.1.8 Collaboration and experience sharing

Encouraging collaboration and sharing experiences between states is also beneficial. Sharing experiences and brainstorming the benefits and challenges of SAATM emphasize the value of mutual learning and cooperation among member states. Engaging technical experts from countries that fully understand the benefits can also facilitate better implementation.

4.4.1.9 Economic and social benefit quantification

Quantifying and clearly communicating the economic, social, and environmental benefits of SAATM is another effective strategy. Providing concrete data and evidence can help convince member states of the value of full participation. This involves quantifying the benefits that could be achieved through SAATM and clearly communicating these to states.

4.4.1.10 Ensuring political will and continuity

Ensuring political will and continuity in implementation, even after changes in government, is also necessary. Maintaining consistent commitment to the initiative is crucial for the long-term success of SAATM. This is highlighted by the need for political will to implement SAATM and ensure continuity in implementation after successive governments. Making SAATM binding among all States and ensuring reciprocity in implementation by SAATM States are also suggested.

4.4.1.11 Language and local employment

Using a common language, such as English, and employing locals are recommended to facilitate better communication and integration within the aviation sector.

4.4.1.12 Trade openness and regional integration

Promoting trade openness and regional integration before Africa-wide implementation are key strategies. Segmented implementation at the regional level can help member states gradually adapt to SAATM's requirements and benefits.

4.4.1.13 Involvement of local companies

Ensuring the involvement of local companies in the aviation sector can enhance the local economic impact. This encourages more member states to participate fully in SAATM.

4.4.2 Addressing policy impediments

Respondents were asked to suggest measures they believed should be taken to address the policy barriers hindering the implementation of SAATM.

To effectively address policy impediments to the implementation of the SAATM, several key measures should be adopted. These measures focus on enhancing regulatory frameworks, improving communication, and addressing political and financial challenges.

4.4.2.1 Regulatory harmonization

A crucial step is the harmonization and domestication of existing regulatory articles. This involves finalizing institutional frameworks, such as the Dispute Settlement Mechanism and the African Civil Aviation Policy, to ensure uniform oversight of SAATM. Developing and enforcing a common regulatory framework across all member states will achieve consistency in aviation policies and

standards. Harmonizing policies related to aeronautical taxes, charges, and non-tariff barriers will streamline operations.

4.4.2.2 Advocacy and communication

Effective advocacy and communication strategies are essential. This involves increasing awareness among SAATM member states and Regional Economic Communities (RECs) about the benefits of SAATM and the YD texts. Sensitizing political leaders and stakeholders at the highest levels is critical to garner support and commitment. Developing targeted training programs and public participation initiatives can further enhance understanding and buy-in. Ensuring stable democratic states buy into SAATM objectives is crucial. Awareness creation among stakeholders and continuous engagement on positive outcomes are also important.

4.4.2.3 Political engagement

Political engagement plays a significant role in overcoming policy impediments. It is necessary to involve political leaders and decision-makers in the SAATM agenda to ensure their support. Building political will and managing conflicts of interest among states can help address resistance and facilitate smoother implementation. Engaging with top government officials and high-level committees from each state can promote consensus and collaboration. Taking discussions outside SAATM to the broader AU agenda, particularly on visas and border control, is also essential.

4.4.2.4 Capacity building

Investing in capacity building is vital. This includes providing technical assistance and training programs for aviation regulatory bodies to enhance their ability to manage the liberalized market. Strengthening the capacity of implementing entities and facilitating airline cooperation will support the effective operationalization of SAATM. Addressing capacity gaps in less developed regions through financial assistance and infrastructure development is also important. More capacity building and training programs for aviation regulatory bodies will enhance their capacity to oversee and manage the market.

4.4.2.5 Operational and future planning

Operational measures should include conducting continent-wide studies on the benefits of aviation to Africa's socio-economic landscape. Planning for future growth involves establishing the Single African Sky Architecture to accommodate increased traffic. Ensuring that all SAATM countries meet minimum safety standards is crucial. Implementing security and facilitation targets and improving continental safety oversight are necessary for maintaining a secure aviation environment.

4.4.2.6 Financial and policy reforms

Enhancing access to sustainable funding for the aviation industry can support SAATM implementation. Implementing regulatory reforms to reduce bureaucratic hurdles will facilitate easier market entry and operations for airlines. Streamlining approval processes and addressing bureaucracy at AU borders are necessary. Additionally, clarifying policies with citizens and ensuring they are tabled in parliament for better consensus can help overcome policy impediments. Implementing regulatory reforms will also reduce bureaucratic hurdles and streamline approval processes for airline operations.

4.4.2.7 Regional and international cooperation

Promoting cooperation among African countries through regional aviation organizations and initiatives is essential. Engaging large regional entities like the Southern African Development Community (SADC), the West African Economic and Monetary Union (WAEMU), and the Economic Community of West African States (ECOWAS) can foster regional integration and alignment of policies. Encouraging the sharing of best practices and experiences will help in standardizing regulations. Ensuring fair market sharing among member states will improve overall implementation. Regional harmonization is critical for SAATM's success.

4.4.2.8 Public participation and state engagements

Public participation and state engagements are necessary to gain wider support. This includes involving local companies in the aviation sector to enhance the local economic impact. Sensitizing states and stakeholders to the benefits of SAATM implementation is crucial. Advocacy on the benefits, involving local companies, and providing reasons for each country to be part of SAATM are vital strategies. Many countries fear that their national airlines may be overtaken by stronger ones, so clear communication of benefits is essential.

4.4.3 Progress uniform implementation of SAATM

The respondent were asked to rate the progress made in achieving uniform implementation of SAATM by African States

The analysis of the progress towards the uniform implementation of SAATM reveals a diverse range of perceptions across different nationalities and age groups. The responses, which were recorded on a scale from 1 (no progress) to 5 (significant progress), offer insights into regional and demographic trends that shape the collective view on this crucial initiative.

4.4.3.1 Rating of uniform implementation of SAATM

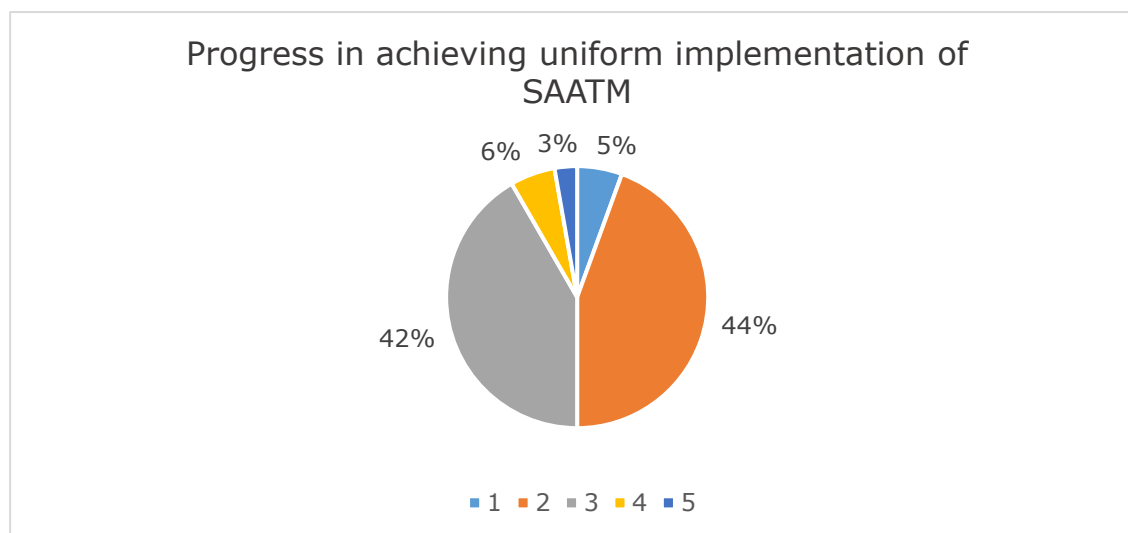


Figure 31: Progress in achieving uniform implementation of SAATM

The majority of responses indicate modest progress, as shown in Figure 31, with most scores falling between 2 and 3. While there are instances of higher progress ratings, the prevalence of

lower ratings suggests that complete implementation across the continent remains an ongoing challenge.

4.4.3.2 Regional patterns based on rating of uniform implementation of SAATM

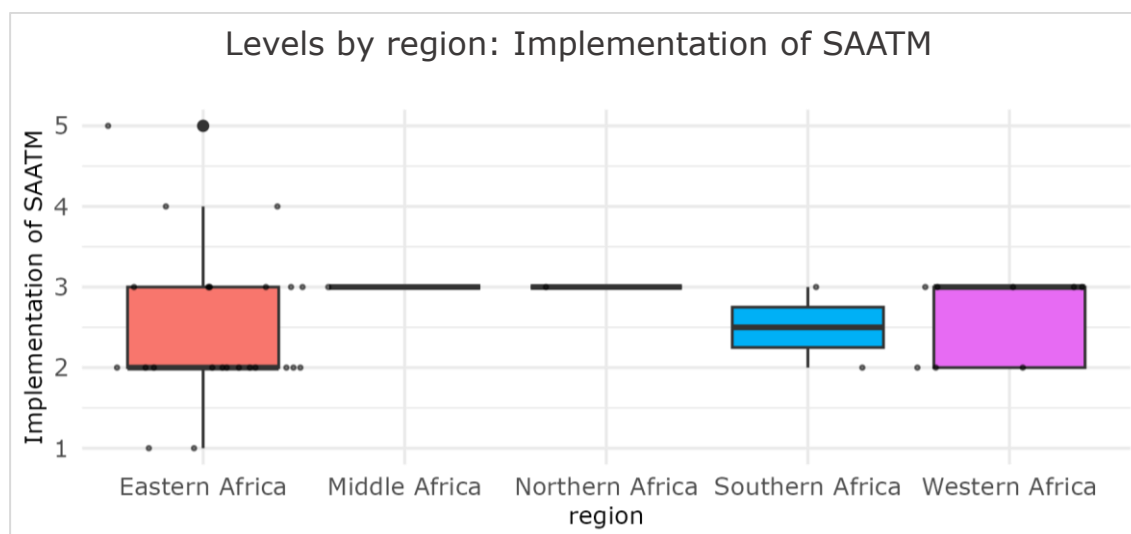


Figure 32: Progress in achieving uniform implementation of SAATM by region

Revealed in Figure 32, there is a general consensus on SAATM implementation progress across various regions. Despite some variability, the overall trend shows similar patterns in progress ratings among countries. Eastern Africa, however, stands out with more diverse ratings

4.4.3.3 Demographic patterns based on rating of uniform implementation of SAATM

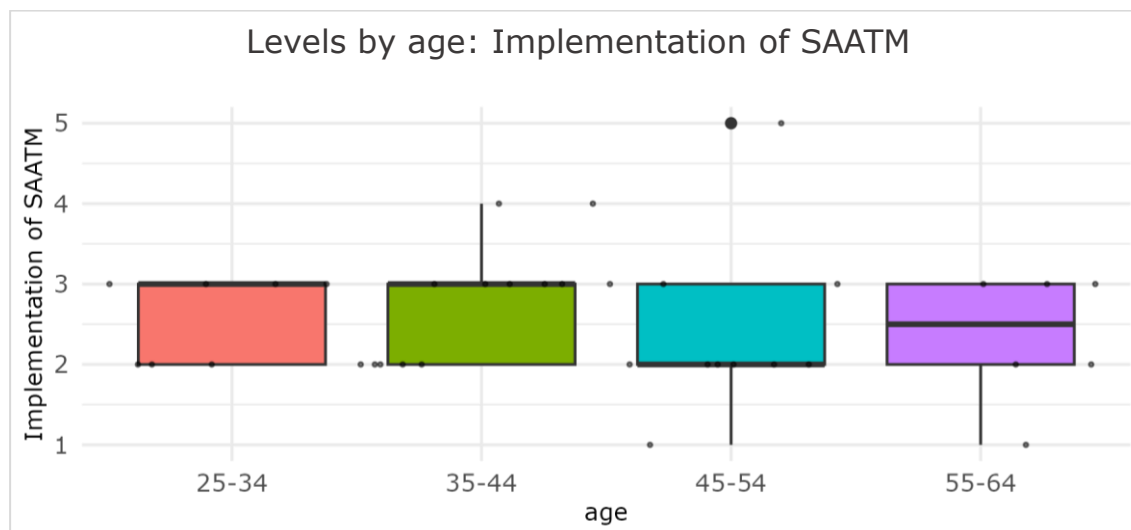


Figure 33: Progress in achieving uniform implementation of SAATM by age

Age-based patterns show a subtle correlation between age and progress ratings, as seen in Figure 33. Younger respondents, particularly those aged 25-34, tend to report slightly higher progress scores. In contrast, older respondents, especially those aged 45-54, often report slightly lower

progress scores. While the differences are minor, this trend suggests that perceptions of SAATM implementation progress may vary slightly by age group.

4.4.3.4 Socio-Economic patterns based on rating of uniform implementation of SAATM

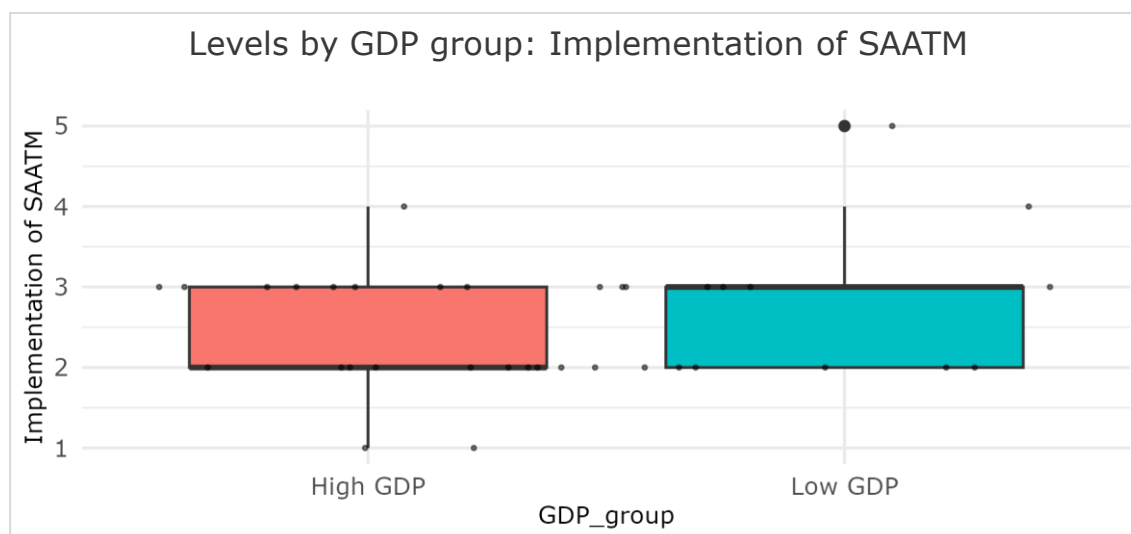


Figure 34: Progress in achieving uniform implementation of SAATM by GDP group

Analysis of progress ratings by GDP group, shown in Figure 34, reveals a slight disparity. In high GDP countries, there is a broader range of ratings. Conversely, respondents from low GDP countries generally rate the implementation somewhat higher. Although the differences are modest, this pattern suggests that socio-economic factors might have a slight impact on perceptions of SAATM implementation progress.

4.4.4 Progress implementation of Yamoussoukro Declaration (YD)

Question 14: Rate the progress in the implementation of the Yamoussoukro Declaration

The evaluation of progress in implementing the Yamoussoukro Declaration provides a detailed snapshot of the perceived advancement in this critical aviation policy. Respondents rated the progress on a scale from 1 (no progress) to 5 (significant progress), revealing a predominantly moderate to low perception of progress.

4.4.4.1 Rating of implementation YD

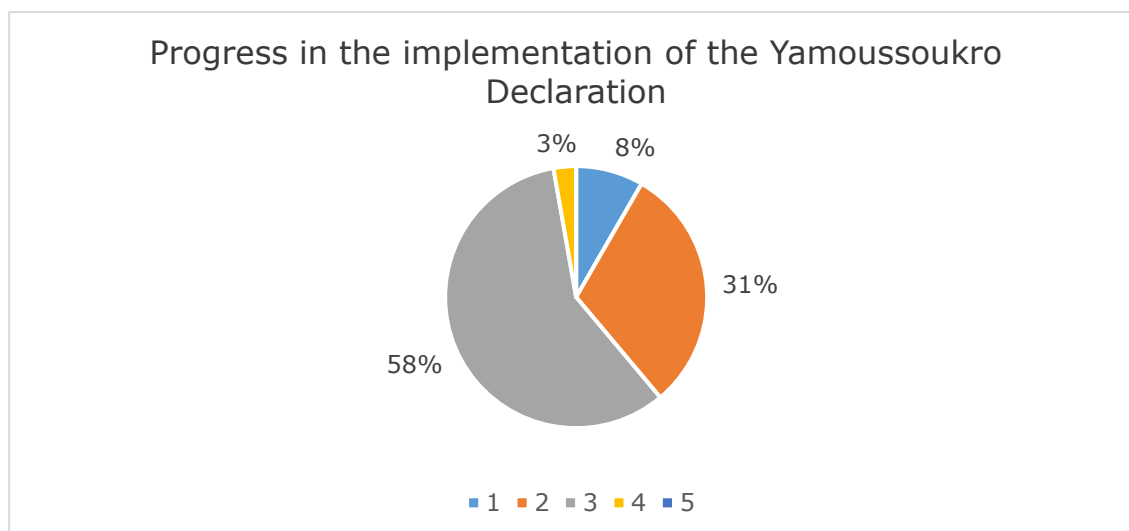


Figure 35: Progress in the implementation of the Yamoussoukro Declaration

As shown in Figure 35, the implementation progress of the YD varies significantly across the sampled countries, with scores ranging from 1 to 4. Overall, there appears to be a moderate level of progress, with several countries reporting scores of 2 or 3, indicating limited to moderate perceived implementation.

4.4.4.2 Regional patterns based on rating of implementation YD

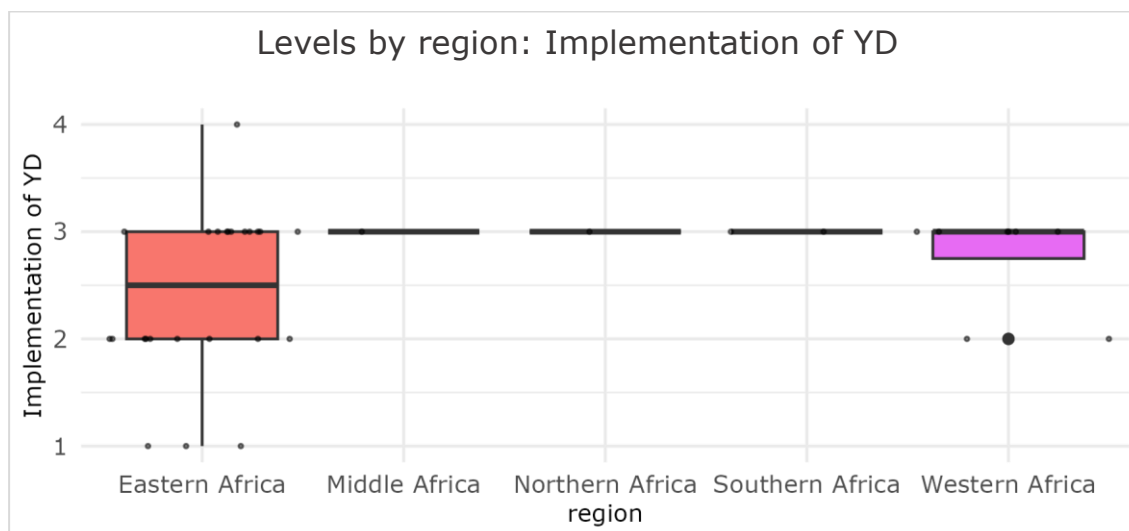


Figure 36: Progress in the implementation of the Yamoussoukro Declaration by region

Regional analysis, demonstrated in Figure 36, reveals distinct patterns in the progress of YD implementation based on respondents' perceptions. Eastern Africa shows a wide range of scores, with some countries reporting higher progress while others fall at the lower end. Across other regions—Western Africa, Southern Africa, Middle Africa, and Northern Africa—there is a general consensus of moderate perceived implementation, with most countries reporting scores of 2 or 3. This indicates a broadly shared view of moderate progress in YD implementation.

4.4.4.3 Demographic patterns based on rating of implementation YD

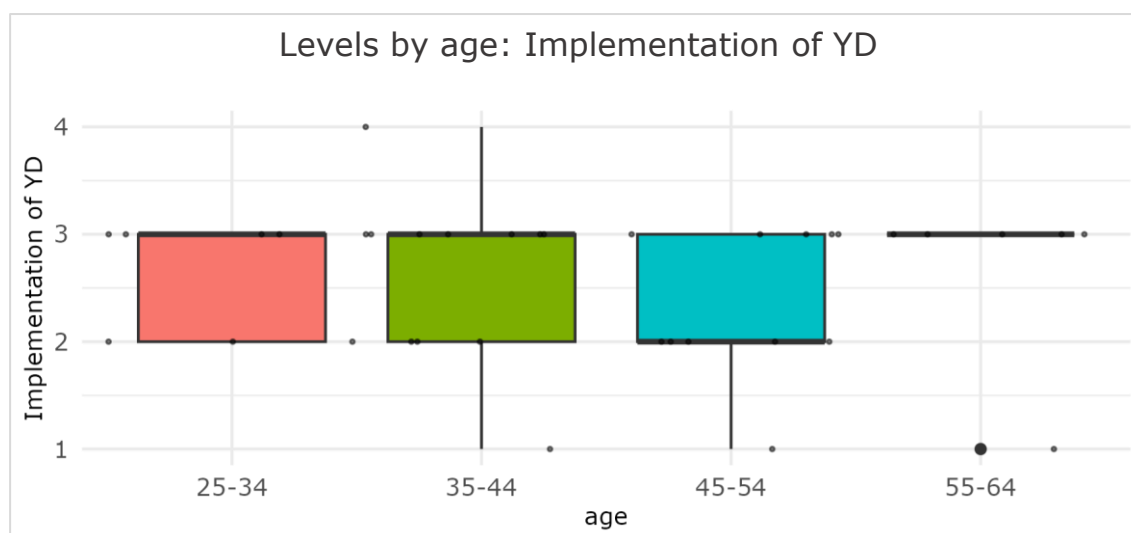


Figure 37: Progress in the implementation of the Yamoussoukro Declaration by age

The results in Figure 37 reveal that there is consensus across age groups regarding the general perception of implementation. Specifically, the 35-44 age group shows more variability, with ratings from 1 to 4. In contrast, the 55-64 age group demonstrates a more consistent perception, with the majority rating it as 3. Only one respondent in this group rated it as 1, suggesting a slightly higher perception in this age group.

4.4.4.4 Socio-economic patterns based on rating of implementation YD

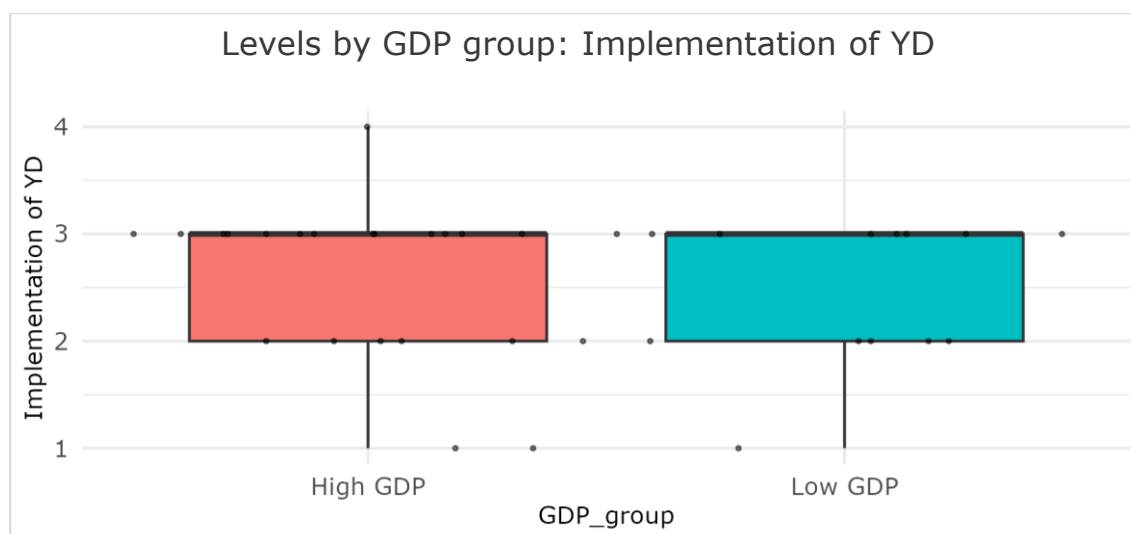


Figure 38: Progress in the implementation of the Yamoussoukro Declaration by GDP group

The mean scores for both GDP groups are nearly identical, with only slight variation observed in the High GDP group, as shown in Figure 38. Overall, both groups provide similar responses.

4.4.5 Most important opportunity from SAATM

Question 15: Which of the following is the most important opportunity offered by SAATM according to you?

4.4.5.1 Commonly Identified opportunities

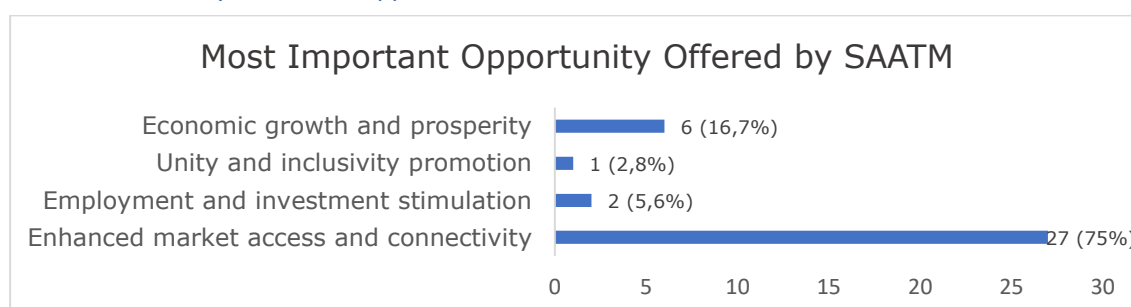


Figure 39: Most important opportunity offered by SAATM

Represented in *Figure 39*, the most frequently identified opportunity among respondents is "Enhanced market access and connectivity" selected by a significant number of participants in different regions. This option is followed by "Economic growth and prosperity", which was also identified by some respondents. In contrast, "Employment and investment stimulation" and "Unity and inclusivity promotion" are mentioned less frequently. This indicates lower but still present interest compared to the top two options.

4.4.5.2 Regional patterns based on commonly identified opportunities

Eastern Africa exhibits the widest range of responses, as respondents from this region selected four out of five available options. In contrast, Southern Africa shows a unanimous preference, with all respondents highlighting "Enhanced market access and connectivity" as their top choice. In Western Africa, respondents demonstrated a dual focus: "Enhanced market access and connectivity" was the predominant choice, receiving six mentions, while "Economic growth and prosperity" garnered two votes. Overall, there was a consensus across all regions that "Enhanced market access and connectivity" is the most important opportunity offered by SAATM.

4.4.5.3 Demographic patterns based on commonly identified opportunities

Across all age groups, there is a notable consensus on the importance of "Enhanced market access and connectivity."

Among the 35-44 age group, there is notable variation in responses. This demographic also shows a significant interest in "Economic growth and prosperity," along with some support for "Employment and investment stimulation" and "Unity and inclusivity promotion." This diversity suggests a broader range of concerns and priorities within this age group.

4.4.5.4 Socio-economic patterns based on commonly identified opportunities

Across both high and low GDP countries, there is a clear consensus on the importance of "Enhanced market access and connectivity." However, a closer examination reveals a subtle difference in preference distribution. High GDP countries show a slightly higher percentage (0.82%) favoring this

option compared to low GDP countries (0.69%). This indicates that while both groups prioritize market access and connectivity, there is relatively more variation in preferences among low GDP countries. This variation may reflect diverse economic contexts and developmental needs within lower GDP economies.

Chapter 5: Conclusion

The successful implementation of the SAATM represents a crucial step towards Africa's economic integration, improved connectivity, and sustainable development. This study has identified both the significant importance of SAATM among stakeholders and the major obstacles that must be overcome to fully realize its potential.

Primary challenges

Key challenges include political instability and regulatory discrepancies across African nations. Inconsistent regulations, bureaucratic hurdles, economic volatility and protectionist policies create substantial barriers to a unified air transport market. Additionally, the affordability and accessibility of air travel are hindered by increased airfares, high taxes, corruption, and inadequate infrastructure, which strain the capacities of airlines and aviation authorities.

Opportunities

Despite these challenges, the potential benefits of SAATM are considerable. Stakeholders widely anticipate that the initiative will drive economic growth and job creation, with 94.4% identifying these as key outcomes. The creation of a unified air transport market is also expected to enhance regional integration and trade, with 97.2% of respondents viewing this as a critical area of impact. Additionally, SAATM will promote social and cultural exchanges, foster tourism development, and encourage innovation and technology transfer within the aviation sector.

Strategic Recommendations

To overcome the identified challenges and maximize the opportunities induced by SAATM, a strategic and coordinated approach is essential. Regulatory harmonization should be prioritized, focusing on uniform standards across member states. Capacity building initiatives are crucial to equip member states with the necessary skills through comprehensive training programs. Enhanced awareness and advocacy campaigns are needed to clearly communicate SAATM's economic and social benefits, particularly in alignment with Africa's Agenda 2063. Furthermore, investments in infrastructure and financial incentives are vital to strengthen the aviation sector, especially in less developed regions. Engaging political leaders and fostering diplomatic efforts will be key to securing broader commitments from member states.

Future Outlook

Looking ahead, the long-term success of SAATM will depend on the collaborative efforts of African nations to address these challenges and seize the opportunities presented by the initiative. Maintaining a sustained focus on regulatory reform, infrastructure development, and capacity enhancement will be critical to unlock the full potential of SAATM. By prioritizing these areas, African countries can achieve significant economic growth, improve air travel standards, and strengthen the continent's position in the global aviation sector. The insights gained from this study provide a clear framework for future efforts to advance SAATM, ultimately leading to a more integrated, prosperous, and connected Africa.

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Chapter 7: Appendix

Research master thesis questionnaire

Dear Participant,

My name is Brecht Beirnaert, and I am a master's student in Supply Chain Management at the University of Hasselt, Belgium. For my master's thesis, I am studying the key challenges, implications, and opportunities in the implementation of the Single African Air Transport Market (SAATM).

SAATM is a flagship vision of the African Union's Agenda 2063, aimed at creating a single unified air transport market in Africa. By facilitating the liberalization of civil aviation, SAATM seeks to enhance connectivity, reduce airfares, and stimulate economic growth across the continent.

The purpose of this questionnaire is to gather insights from key stakeholders involved in the aviation sector. Your participation will provide valuable information to understand the current state of SAATM implementation, identify obstacles, and uncover potential benefits for African states and their citizens.

The questionnaire covers several key topics:

- General awareness and understanding of SAATM
- Factors hindering the full implementation of the SAATM
- Factors contributing to a favorable environment for SAATM implementation
- Opportunities that may arise from full SAATM implementation

Your responses will remain confidential and will be solely used for academic research purposes. The findings of this study will be shared with relevant stakeholders to support the successful implementation of SAATM.

I greatly appreciate your time and input in completing this questionnaire. Thank you for your participation.

Sincerely,

Brecht Beirnaert

Master's Student, Supply Chain Management University of Hasselt, Belgium

* Indicates required question

Personal information

The purpose of this section is to gather general information that helps us analyze trends, identify patterns, and make informed decisions.

Age group *

Tick all that apply.

- ☐ 18-24
- ☐ 25-34
- ☐ 35-44
- ☐ 45-54
- ☐ 55-64
- ☐ 65+

Employment status *

Tick all that apply.

- ☐ Employed full-time
- ☐ Employed part-time
- ☐ Self-employed
- ☐ Unemployed
- ☐ Student
- ☐ Retired
- ☐ Prefer not to say

Industry (if employed):

Highest level of education completed *

Tick all that apply.

- ☐ High school diploma or equivalent
- ☐ Associate degree
- ☐ Bachelor's degree
- ☐ Master's degree
- ☐ Doctoral degree
- ☐ Prefer not to say

General awareness and understanding of SAATM

Kindly rate the awareness level (in %) of SAATM *

Tick all that apply.

- ☐ 0-25
☐ 26-50
☐ 51-75
☐ 76-100

Factors hindering the full implementation of the SAATM

The successful implementation of the Single African Air Transport Market (SAATM) faces several hurdles. This section of the questionnaire aims to identify the key obstacles that countries and stakeholders encounter in adopting and implementing SAATM.

What do you perceive as the main challenges hindering the implementation of the Single African Air Transport Market (SAATM)? State three challenges.

How significant is the lack of regulatory harmonization across African countries *
as a challenge for SAATM implementation?

Mark only one oval.

1 2 3 4 5

Not ☐ ☐ ☐ ☐ ☐ Extremely significant

Which of the following poses the biggest operational challenge to SAATM implementation according to you? (select maximum 3 options) *

Tick all that apply.

- ☐ Regulatory Harmonization
- ☐ Infrastructure Deficiencies
- ☐ Safety and Security Standards
- ☐ Airline Capacity and Competition
- ☐ Political and Economic Stability
- ☐ Customs and Immigration Procedures
- ☐ Labor and Workforce Issues (Shortage of skilled personnel)
- ☐ Cost and Funding
- ☐ Interstate Disputes
- ☐ Environmental Concerns

What is the biggest hindrance to BASA compliance in the implementation of SAATM? *

Tick all that apply.

- ☐ Regulatory discrepancies between countries
- ☐ Lack of financial resources
- ☐ Insufficient infrastructure
- ☐ Political issues
- ☐ Other

How do you rate the Impact of Higher Air fares in relation to implementation of SAATM? *

Mark only one oval.

	1	2	3	4	5	
Not	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Extremely significant

Factors contributing to a favorable environment for SAATM implementation

Implementing the Single African Air Transport Market (SAATM) carries significant implications for the aviation sector and the broader economy in Africa. This section explores the potential impacts of SAATM on various facets such as economic growth, air fare affordability and connectivity.

How do you rate the impact of the implementation of SAATM on connectivity and integration across Africa? *

Mark only one oval.

1	2	3	4	5		
<hr/>						
No i	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Significant impact

How has SAATM impacted regional integration and connectivity among African countries? *

Mark only one oval.

1	2	3	4	5		
<hr/>						
No I	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Significant impact

Rate the potential positive impact of SAATM on economic growth and prosperity on a scale of 1 to 5. *

Mark only one oval.

1	2	3	4	5		
<hr/>						
Low	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	High impact

Which of the following are the most significant implications of SAATM for sustainable development according to you? (Kindly select five options) *

Tick all that apply.

- ☐ Enhanced access to education and healthcare
- ☐ Reduced environmental footprint
- ☐ Promotion of social inclusion and gender equality
- ☐ Economic Growth and Job Creation
- ☐ Regional Integration and Trade
- ☐ Social and Cultural Exchange
- ☐ Tourism Development
- ☐ Environmental Sustainability
- ☐ Resilience and Inclusivity
- ☐ Innovation and Technology Transfer

Have there been any unintended consequences (positive or negative) resulting from SAATM? If so, please elaborate. *

Opportunities that may arise from full SAATM implementation

The Single African Air Transport Market (SAATM) presents numerous opportunities for growth and development within the African aviation sector and beyond. This section focuses on identifying the potential benefits and opportunities that SAATM offers, such as increased tourism, job creation, foreign investment, and enhanced connectivity.

What strategies can be employed to encourage more African Union member states to fully participate in SAATM?

What measures do you think should be taken to address policy impediments facing SAATM implementation?

How much progress has been made in achieving uniform implementation of SAATM? *

Mark only one oval.

1 2 3 4 5

No progress ☐ ☐ ☐ ☐ ☐ Significant progress

Rate the progress in the implementation of the Yamoussoukro Declaration *

Mark only one oval.

1 2 3 4 5

No progress ☐ ☐ ☐ ☐ ☐ Significant progress

Which of the following is the most important opportunity offered by SAATM according to you? *

Tick all that apply.

- ☐ Enhanced market access and connectivity
- ☐ Economic growth and prosperity
- ☐ Employment and investment stimulation
- ☐ Sustainable development promotion
- ☐ Unity and inclusivity promotion

Thank You

Thank you for taking the time to complete this questionnaire. Your participation is invaluable and greatly appreciated. Your responses will help me gain valuable insights and make informed decisions. I assure you that your information will remain confidential and anonymous. Thank you once again for your contribution!