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# APPENDIX A

## AFRICAN COUNTRIES' OVERVIEW OF AIR TRANSPORT AND THE YAMOUSSOUKRO DECISION

Source: Schlumberger (2010:192-198)



Country	Date Abuja Treaty signed	Date Abuja Treaty ratified	Date Abuja Treaty instruments deposited	Yamoussoukro Declaration member	REC membership	REC Yamoussoukro Declaration membership <sup>a</sup>	National airline <sup>b</sup>	Remarks and observations about implementation of the Yamoussoukro Decision
Algeria	6.Mar.91	21.Jun.95	18.Jul.95	Yes	AMU	No	Yes	One fully state-owned airline and one private carrier; the government is considering opening up, but is still quite restrictive.
Angola	6.Mar.91	11.Apr.92	23.Jun.92	Yes	COMESA, SADC	Pending	Yes	One fully state-owned airline; restrictive bilaterals policy
Benin	27.Feb.92	10.May.99	31.May.99	Yes	WAEMU	Yes	No	Three small operating carriers
Botswana	6.Mar.91	27.Jun.96	3.Jul.96	Yes	SADC	No	Yes	One 100% state-owned carrier
Burkina Faso	6.Mar.91	19.May.92	17.Jun.92	Yes	WAEMU	Yes	No	One privately owned operator
Burundi	6.Mar.91	5.Aug.92	6.Oct.92	Yes	EAC, COMESA	Pending	No	One privately owned operator
Cameroon	6.Mar.91	20.Dec.95	8.Apr.96	Yes	CEMAC	Yes	Yes	Liquidation of national airline in progress
Cape Verde	6.Mar.91	12.Apr.93	11.May.93	Yes	BAG, ECOWAS	No	Yes	Restructuring of national airline in progress
Central African Republic	6.Mar.91	18.Jun.93	22.Jun.93	Yes	CEMAC	Yes	No	No known operator
Chad	6.Mar.91	26.Jun.93	24.Aug.93	Yes	CEMAC	Yes	No	National carrier Air Chad is 98% state owned, but no longer operating.
Comoros	6.Mar.91	6.Jun.94	20.Jun.94	Yes	COMESA	Pending	Yes	Majority state-owned carrier
Congo, Dem. Rep. of	6.Mar.91	19.Jun.93	21.Jun.93	Yes	COMESA, SADC	Pending	No	Five small operators, all banned in Europe
Congo, Rep. of	6.Mar.91	30.Jul.96	15.Jan.97	Yes	CEMAC	Yes	No	Three small private operators
Côte d'Ivoire	6.Mar.91	22.Feb.93	11.May.93	Yes	WAEMU	Yes	No	Air Ivoire is 49% state owned and 34% owned by Air France.
Djibouti	6.Mar.91	N.A.	N.A.	No	COMESA	Pending	Yes	One small state-owned and one small private operator
Egypt, Arab Rep. of	6.Mar.91	18.Dec.92	26.Jan.93	Yes	COMESA	Pending	Yes	Dominant state-owned carrier and one small private operator
Equatorial Guinea	N.A.	20.Dec.02	19.Feb.03	No	CEMAC	Yes	No	Several small private operators all banned in Europe
Eritrea	6.Mar.91	N.A.	N.A.	No	COMESA	Pending	No	Two private operators
Ethiopia	6.Mar.91	5.Nov.92	6.Nov.92	Yes	COMESA	Pending	Yes	One state-owned operator; government pursues a very open policy; most new bilateral air service agreements conform to the Yamoussoukro Decision.



Country	Date Abuja Treaty signed	Date Abuja Treaty ratified	Date Abuja Treaty instruments deposited	Yamoussoukro Declaration member	REC membership	REC Yamoussoukro Declaration membership <sup>a</sup>	National airline <sup>b</sup>	Remarks and observations about implementation of the Yamoussoukro Decision
Gabon	6.Mar.91	N.A.	N.A.	No	CEMAC	Yes	No	Two private operators
Gambia, The	6.Mar.91	20.Apr.93	14.May.93	Yes	BAG, ECOWAS	No	No	Three private operators
Ghana	6.Mar.91	25.Sep.91	25.Oct.91	Yes	BAG, ECOWAS	No	No	State-owned carrier ceased operations in 24; one private operator.
Guinea	6.Mar.91	17.Jul.92	21.Sep.92	Yes	BAG, ECOWAS	No	No	One private operator
Guinea-Bissau	6.Mar.91	24.Jun.92	30.Jun.92	Yes	WAEMU	Yes	No	One private operator
Kenya	6.Mar.91	18.Jun.93	22.Jun.93	Yes	COMESA, EAC	Pending	Yes	Government pursues an open policy toward the Yamoussoukro Decision; it retains only 23% of Kenya Airways, while KLM owns 26%; five other private operators.
Lesotho	6.Mar.91	12.Aug.97	11.Feb.98	Yes	SADC	No	No	No known operators
Liberia	6.Mar.91	23.Jun.93	29.Jun.93	Yes	BAG, ECOWAS	No	No	Two private operators, both banned in Europe
Libya	6.Mar.91	2.Nov.92	28.Jan.93	Yes	COMESA	Pending	Yes	Three state-owned and three private carriers
Madagascar	6.Mar.91	N.A.	N.A.	No	COMESA, SADC	Pending	Yes	One majority state-owned carrier
Malawi	6.Mar.91	26/0693	22.Jul.93	Yes	COMESA, SADC	Pending	Yes	One fully state-owned carrier
Mali	6.Mar.91	13.Nov.92	27.Jan.93	Yes	WAEMU	Yes	Yes	One majority state-owned carrier and two private carriers
Mauritania	6.Mar.91	20.Nov.01	4.Jul.02	No	AMU	No	Yes	One fully state-owned carrier
Mauritius	6.Mar.91	14.Feb.92	27.Feb.92	Yes	COMESA, SADC	Pending	Yes	Reservations concerning the Yamoussoukro Decision were expressed at the African Union because of missing competition regulation; strong majority state-owned carrier.
Morocco	N.A.	N.A.	N.A.	No	AMU	No	Yes	Not a member of the African Union; strong majority state-owned carrier and one private operator
Mozambique	6.Mar.91	14.May.92	9.Jul.92	Yes	SADC	No	Yes	Majority state-owned carrier and one small private operator
Namibia	6.Mar.91	28.Jun.92	1.Jul.92	Yes	SADC	No	Yes	Fully state-owned carrier
Niger	6.Mar.91	22.Jun.92	22.Jul.92	Yes	WAEMU	Yes	No	No known operators
Nigeria	6.Mar.91	31.Dec.91	9.Jan.92	Yes	BAG, ECOWAS	No	No	Eleven privately owned carries
Rwanda	6.Mar.91	1.Oct.93	15.Nov.93	Yes	COMESA, EAC	Pending	No	One privately owned operator

(continued)

Country	Date Abuja Treaty signed	Date Abuja Treaty ratified	Date Abuja Treaty instruments deposited	Yamoussoukro Declaration member	REC membership	REC Yamoussoukro Declaration membership <sup>a</sup>	National airline <sup>b</sup>	Remarks and observations about implementation of the Yamoussoukro Decision
Saharawi Arab Democratic Republic (Western Sahara)	6.Mar.91	25.Aug.92	23.Oct.92	Yes	N.A.	No	No	No known operators; not an International Civil Aviation Organization contracting state, which renders aircraft registration and international airline operations difficult
São Tomé and Príncipe	6.Mar.91	2.Jun.93	22.Jun.93	Yes	N.A.	No	No	One 35% state-owned and majority privately owned carrier
Senegal	6.Mar.91	26.Feb.92	18.Mar.92	Yes	WAEMU	Yes	No	One private carrier that is fully owned by Royal Air Maroc
Seychelles	6.Mar.91	11.Oct.91	7.Nov.91	Yes	COMESA	Pending	Yes	Fully state-owned carrier
Sierra Leone	6.Mar.91	15.Mar.94	12.Apr.94	Yes	BAG	No	No	Four privately owned carriers three of which are banned in Europe
Somalia	6.Mar.91	N.A.	N.A.	No	N.A.	No	No	One known private carrier
South Africa	10.Oct.97	31.May.01	25.Jun.01	No	SADC	No	Yes	One majority state-owned carrier and at least twelve private operators; the government has declared an open skies policy and has started to apply the Yamoussoukro Decision in bilaterals.
Sudan	6.Mar.91	8.Feb.93	15.May.93	Yes	COMESA	Pending	Yes	One fully state-owned carrier and three private operators
Swaziland	29.Jun.92	6.Jun.01	22.Jun.04	No	COMESA, SADC	Pending	No	Two private operators of which one is banned in Europe
Tanzania	6.Mar.91	10.Jan.92	3.Feb.92	Yes	EAC, SADC	No	Yes	One fully state-owned carrier and five private operators; the government has displayed a relatively open skies policy, especially within the EAC and the SADC.
Togo	6.Mar.91	5.May.98	18.May.98	Yes	WAEMU	Yes	No	Two private operators of which one is for cargo only
Tunisia	6.Mar.91	3.May.94	10.Jun.94	Yes	AMU	No	Yes	One majority state-owned carrier and two private operators
Uganda	6.Mar.91	31.Dec.91	9.Mar.92	Yes	COMESA, EAC	Pending	No	Two private operators; since its national carrier was liquidated in 2001, the government has been applying an open skies policy within the Yamoussoukro Decision framework.

(continued)



Country	Date Abuja Treaty signed	Date Abuja Treaty ratified	Date Abuja Treaty instruments deposited	Yamoussoukro Declaration member	REC membership	REC Yamoussoukro Declaration membership <sup>a</sup>	National airline <sup>b</sup>	Remarks and observations about implementation of the Yamoussoukro Decision
Zambia	6.Mar.91	26.Oct.92	9.Nov.92	Yes	COMESA, SADC	Pending	No	One private operator; the government protects its market in view of the possible start-up of a new national carrier.
Zimbabwe	6.Mar.91	6.Nov.91	26.Nov.91	Yes	COMESA, SADC	Pending	Yes	One fully state-owned carrier

Source: Author's compilation.

Note: NA. = not applicable, AMU = Arab Maghreb Union, BAG = Banjul Accord Group, CEMAC = Economic and Monetary Community of Central Africa, COMESA = Common Market for Eastern and Southern Africa, EAC = East African Community, ECOWAS = Economic Community of Western African States, REC = regional economic community, SADC = Southern African Development Community, WAEMU = West African Economic and Monetary Union.

a. Some RECs have implemented the Yamoussoukro Decision with binding regulation within their communities. This column answers the question whether a given state, based on its membership in a REC, is currently bound to the Yamoussoukro Decision.

b. The state owns and controls at least 51 percent of its national carrier.

c. The case of Mauritius is unclear. According to an interview with the African Union's legal counsel, Fafré Camara, on 25 April 2007, in Addis Ababa, the African Union's depository did not receive a letter indicating that Mauritius had withdrawn from the Yamoussoukro Decision in 24. The government of Mauritius is aware that it never submitted a formal notification of withdrawal. Apparently, the situation provided some diplomatic advantages according to an interview with Deputy Prime Minister C. G. Xavier Luc Duval on 17 September 2007, in Montreal. However, this is in contradiction to a recommendation in an African Union report (2005b, p. 13), which clearly mentions that Mauritius withdrew and recommends 'necessary action to bring Mauritius to reconsider its position.' In the absence of any formal document of withdrawal, Mauritius should still be considered a member of the Yamoussoukro Decision (African Union 2007c).

## **APPENDIX B**

# **INSTITUTIONS AND ORGANISATIONS LINKED TO THE IMPLEMENTATION OF THE YAMOUSSOUKRO DECISION**

## **Economic Commission for Africa**

The Economic Commission for Africa (ECA) was established by the Economic and Social Council (ECOSOC) of the United Nations (UN) in 1958 as one of the UN's five regional commissions (ECA, 2011). The ECA is directly involved in implementing the YD at regional and sub-regional levels and has the duty of ensuring that all regional organisations concerned follow the same procedures. Article 9.2 of the YD stipulates that the Monitoring Body, whose main task is the overall supervision, follow-up and implementation of the Yamoussoukro Decision, is composed of the ECA, OAU, AFCAC and AFRAA (ECA, 1999:8). The overview of these organisations, as well as their role in the process of the YD implementation, is discussed in the sections below.

The ECA assists with funding of the workshops and seminars to clarify the articles of the Decision; it also provides technical assistance on the establishment of the necessary mechanisms for the implementation of the YD. At the Eighth Conference on Aviation and Allied Business Leadership, held in Johannesburg in 2002, the ECA proposed the establishment of a ministerial committee to spearhead the implementation of the Yamoussoukro Decision. The committee was formed by the Nigerian and South African Ministers responsible for Civil Aviation (ECA, 2003:8).

## **International Civil Aviation Organisation**

The International Civil Aviation Organisation (ICAO) is a United Nations specialised agency for civil aviation. The major aim of ICAO is to ensure the safe, efficient and orderly evolution of international civil aviation (ICAO, 2011). ICAO's role in the implementation of the YD, as reconfirmed in Article 6 of the Decision, is to ensure that all policies related to the Decision are in accordance with the international civil aviation safety standards and practices as recommended by ICAO (ECA, 1999:7). In addition, Article 8 of the YD provides for conflict resolution on the basis of ICAO practices (ECA, 2003:11). To date, safety oversight in Africa can be regarded as one of the main obstacles to the YD implementation, which was elaborated in Chapter 3 section 3.2.5.



## **African Union**

The African Union (AU), previously known as the Organisation of African Unity (OAU), is a body that was set up with its main aim being to accelerate the process of integration on the Continent. The aim was supported by several objectives: to rid the Continent of the remaining vestiges of colonisation and apartheid, to promote unity and solidarity among African countries, to coordinate and intensify cooperation for development, to safeguard the sovereignty and territorial integrity of Member States and to promote international cooperation within the framework of the United Nations (African Union, 2011a).

The YD has been adopted by the AU in such a way that all Member States of the African Union are automatically expected to take part in implementing the Decision. By the end of 2010, there were 53 internationally recognised members.

The activities of the AU are integrated into the regional follow-up organ for the implementation of the Decision, which comes under its presidency. The regional follow-up organ, also known as the Monitoring Body, was established in accordance with Article 9 of the Yamoussoukro Decision and consists of the AU (President), ECA (Secretariat), AFCAC (Rapporteur), and is assisted by the AFRAA and representatives of sub-regional organisations (ECA, 1999; ECA, 2003).

## **African Civil Aviation Commission**

The African Civil Aviation Commission (AFCAC) was established in 1969 as a specialised agency of the OAU. AFCAC aims to encourage cooperation in all civil aviation activities in Africa (Department of International Relations and Cooperation, 2004). Its main objectives, *inter alia*, are: a) the provision of civil aviation authorities with a framework to discuss and plan all the required measures of coordination and cooperation in all their aviation activities and b) the promotion of the coordination, better utilisation and orderly development of African air transport systems (OAU, 1975).



AFCAC has established a follow-up committee on the implementation of the YD. This committee has been actively involved in addressing the problems encountered by its members (Ssamula, 2008:20). At the Third African Union Conference of Ministers Responsible for Air Transport in 2007, a resolution was adopted in which the duties and functions of the Executing Agency of the Yamoussoukro Decision were entrusted to AFCAC. It was decided that the Executing Agency would be responsible for the economic supervision of the liberalised air transport industry in Africa with a view to hastening the implementation of the YD (Kajange, 2009:1).

### **African Airlines Association**

The African Airlines Association (AFRAA) was established in 1968 in Ghana as a Trade Organisation open to airlines of African states, with the objective of harmoniously developing African air services. AFRAA's current membership stands at 40 carriers from 35 different countries, including national airlines, and provides a platform for its members to exchange vital information concerning the industry (AFRAA, 2011).

AFRAA actively continues supporting the Decision and has been creating awareness amongst its members through seminars and workshops, highlighting the potential benefits of the YD to airlines. In conjunction with the AFCAC, IATA and ICAO, the association embarked on a campaign on improving the perception and standards of air transport safety on the Continent as part of the overall strategy of implementing the Decision (African Union, 2005:5). AFRAA has conducted studies on the effects of code-sharing and franchising within the context of liberalisation of air transport markets in Africa. It has also participated in meetings organised at country and sub-regional levels on competition rules, merits of the Decision, implications of the European Union external air policy and US Open Skies policy on African carriers, among others (ECA, 2003:6; African Union, 2005:8).

## **APPENDIX C**

### **SUMMARY OF WAEMU'S MOST SIGNIFICANT AIR TRANSPORT PROGRAMME REGULATIONS**

<b>Regulation</b>	<b>WAEMU air transport programme</b>	<b>Yamoussoukro Decision</b>
<i>Traffic rights</i>	Regulation No 20/2002 on conditions for market access of air carriers within WAEMU grants all freedoms, including cabotage after entitlement by member states.	This regulation clearly exceeds the requirements of the YD under Article 3, which includes third, fourth and fifth freedom traffic rights.
<i>Tariffs</i>	Regulation No 07/2002 on tariffs on air services for passengers, freight and mail within WAEMU allows carriers to freely fix tariffs, which need to be filed only 24 hours in advance.	The YD under Article 4 requires filing at least 30 days in advance.
<i>Competition regulation</i>	Regulation No 24/2002 on conditions for market access by carriers makes the exercise of traffic rights subject to competition legislation. Enforcement actions may be taken by the WAEMU Commission.	Article 7 of the YD notes that state parties shall ensure competition, which is accomplished by the implementation of WAEMU regulation.

Source: Schlumberger (2010:80-81)

# APPENDIX D

## MAIN COMPONENTS OF THE MULTILATERAL AIR SERVICES AGREEMENT

<b>Component</b>	<b>Multilateral Air Services Agreement</b>	<b>Yamoussoukro Decision</b>
<i>Traffic rights</i>	First and second freedom rights are granted without conditions or restrictions; third, fourth and fifth freedom rights are granted to any scheduled and non-scheduled passenger, cargo and mail flights that are conducted in the territory of the contracting states. Each contracting state will enjoy fifth freedom traffic rights with respect to other African states in accordance with the YD.	All BAG members are full YD member states; therefore this membership can be interpreted as an acknowledgement and reaffirmation of the YD by BAG.
<i>Designation of carrier</i>	Each contracting state may designate one or more airlines to operate on the specified route in accordance with MASA.	The carriers may be from another contracting state and the designation may be refused only if the chosen airline does not conform to the eligibility criteria defined in Article 6.9 of the YD.
<i>Tariffs</i>	Tariffs are to be freely established based on commercial considerations and are not subject to approval.	In line with Article 4 of the YD
<i>Capacity and frequency</i>	Except for considerations concerning safety, security and environmental requirements, no restrictions shall be imposed on the frequency, capacity, and/or types of aircraft used on air services under the agreement.	In line with Article 5 of the YD

Source: Schlumberger (2010:84-85)

# APPENDIX E

## CEMAC AGREEMENT ON AIR TRANSPORT AND CIVIL AVIATION CODE

<b>Provision</b>	<b>CEMAC Agreement on Air Transport</b>	<b>Yamoussoukro Decision</b>
<i>Designation of carrier</i>	Each member state designates two carriers to participate in the intra-community air services market; the member states must grant access to all carriers and may not give preference to their own carriers.	Similar to Article 6 of the YD
<i>Traffic rights</i>	First and second freedom rights are granted without conditions; third and fourth freedom rights are granted for any scheduled passenger, cargo and mail flights that are conducted within the CEMAC region. Fifth freedom rights became fully liberalised for community operators in August 2001; eighth freedom rights (cabotage) are possible if a member state specifically grants this right to a designated carrier of another member state.	Similar to Article 3 of the YD
<i>Tariffs</i>	Tariffs are freely determined on commercial considerations.	Same as Article 4 of the YD
<i>Capacity and frequency</i>	The member states must grant a maximum number of frequencies, but the designated carriers must coordinate their schedules; no restriction of capacity and types of aircraft shall be imposed.	Similar to Article 5 of the YD

Source: Schlumberger (2010:88-89)

<b>Provision</b>	<b>CEMAC Civil Aviation Code</b>	<b>Matching Article of the YD</b>
<i>Market Access</i>	Liberalisation of first to fifth freedom rights for scheduled air services within the community and full liberalisation of cargo and on-demand traffic.	Article 3
<i>Tariffs</i>	Free, but "reasonable" tariff fixing by carriers to be filed 60 days in advance and interdiction of anticompetitive practices.	Article 4
<i>Frequency and capacity</i>	No restriction on frequency and capacity, but commercial activities must be coordinated among operators and their programmes must be approved by the civil aviation authorities.	Article 5
<i>Designation and establishment</i>	Single or multiple designation of operator by each member countries with requirements for community nationality in relation to ownership and minimum standards for technical, financial and managerial qualifications.	Article 6
<i>Competition regulation</i>	Code of conduct for carriers that aims at developing a sound competitive environment by prohibiting all forms of price and capacity dumping.	Article 7

Sources: Schlumberger (2010:90-91); CEMAC in Schlumberger (2010)

# APPENDIX F

## PHASE II COMESA AIR TRANSPORT LIBERALISATION



<b>Provision</b>	<b>Phase II COMESA air transport liberalisation</b>	<b>Yamoussoukro Decision</b>
<i>Market access</i>	Any air carrier is eligible, provided it is substantially owned and effectively controlled by a COMESA member state or its nationals.	In contrast to Article 6 of the YD where traffic rights are granted on a bilateral basis between two or three countries (fifth freedom right), COMESA carriers are able to operate between any destination within COMESA.
<i>Traffic rights</i>	Unrestricted movement of air transport within COMESA.	Article 3
<i>Tariffs</i>	All COMESA member states have agreed on the removal of all tariff and non-tariff barriers to facilitate the establishment of a free trade area, implying that air services are free from any tariff regulation.	Article 4
<i>Capacity and frequency</i>	No restrictions shall be imposed during Phase II.	Article 5

Sources: COMESA (1999); Schlumberger (2010:95-96)

# APPENDIX G

## LIBERALISATION TARGETS

Element	Current situation	Targets 2006 - 2010				
		2006	2007	2008	2009	2010
Implementation of the YD	17 African states have agreed to implement the key elements of the YD with SA, representing approximately 32% of YD states.  <b>Note:</b> implementation of targets is subject to readiness of African states to implement the YD.	15%	25%	35%	50%	65%
Multiple designation	Provided in 76% of total agreements	80%	85%	90%	95%	97%
Tariff liberalisation	Provided in 57% of total agreements	65%	70%	75%	80%	85%
Code-share	Provided in 40% of total agreements	50%	60%	70%	80%	90%
Non-scheduled passenger services	Safety/security major consideration. Potential impact on low density routes served by scheduled airlines to be considered.	Research to be conducted re impact				

Source: Department of Transport (2006:59)

# APPENDIX H

## LIST OF PARTICIPANTS IN THE DELPHI

## LIST OF THE DELPHI EXPERTS

<b>Name of expert</b>	<b>Position</b>	<b>Organisation</b>
Vuwani Ndwamato	Director: Air Transport	South African Department of Transport
Professor Peter Morrell	Director of Research	Department of Air Transport Cranfield University
Pritt Chibole	Manager Offline Sales: Eastern, Central, West and North Africa	Qatar Airways
Kendy Phohleli	Country Manager: South Africa	Qatar Airways
Sharmla Dharamalingam	Assistant Director: Bilateral Affairs Air Transport	South African Department of Transport
Ahmed Bassa	Project Executive: Aeronautical	Dube TradePort
Jean-Francois D'Amours	Country Manager: Nigeria	Qatar Airways
Mr. Ketso Moeketsi	Director: Lesotho Civil Aviation	Lesotho Civil Aviation Authority
Manuela Goldman	Manager: Southern Africa offline	Qatar Airways
Nikki Samuels	Manager: Pricing South Africa and Offline	Qatar Airways

<b>Name of expert</b>	<b>Position</b>	<b>Organisation</b>
Bella Sithole	Assistant Director: Bilateral Affairs Air Transport	South African Department of Transport
Saamer Abuel-Ealeh	Executive: Pricing and Inventory	British Airways
Rosemary Adogo	Area Manager: South Africa	Kenya Airways
Mikhail Andriyanov	Consultant	Lufthansa Consulting
Vadim Vilgelmi	Director: Business Development	Lufthansa Consulting
Mr. Biseko Chiganga	Senior Air Transport Officer	Ministry of Infrastructure Development: Tanzania
Ranaivoarison Voairana	Air Transport Director	Civil Aviation of Madagascar
Darren Hay	Manager: International Affairs	South African Airways
Sameer Butt	Business Analyst: Kenya	Qatar Airways
Jonathan Minnett	Business Development Manager: Africa	Qatar Airways
Andrew Stern	Country Manager: Kenya	Qatar Airways



<b>Name of expert</b>	<b>Position</b>	<b>Organisation</b>
Dr Andreas Papatheodorou	Assistant Professor in Industrial Economics with emphasis on Tourism	University of Aegean Department of Business Administrations
Dr Joachim Vermooten	Aviation expert	Department of Public Enterprises
Ramesh Motilal	Head of Department: Statistics and Billing	Airports Company South Africa

# APPENDIX I

## THE DELPHI





19 March 2011

Dear Colleague

An important research project on the relationship between South African aviation policy in Africa and air passenger traffic flows is currently being undertaken as part of a doctoral research programme. The main aim of the research is the development of a model that can be used by aviation authorities to test the relationship between changes in bilateral air service agreements and air passenger traffic flows between any arbitrary country-pair.

Current research on aviation policy in the context of further liberalisation has shown that various factors ranging from more liberal bilateral air service agreements such as increased capacity, allowance of fifth freedom rights, multiple designation to exogenous variables (for example, tourism demand, cultural affinities, price) amongst others, have a direct or indirect influence on air passenger traffic flows between arbitrary country-pairs. However, we need to ensure that we take your views as an expert on aviation into consideration. Thus, to enable us to achieve the most comprehensive results we need your views on:

- those features of bilateral air service agreements that you believe directly or indirectly affect air passenger traffic flows between two countries (any arbitrary country-pair)
- other factors that you feel directly or indirectly have an influence on air passenger traffic flows between an arbitrary country-pair.

Please feel free to either briefly list the features and factors or to describe your views more fully. This should take approximately **20 minutes** to complete. After receiving your feedback we consolidate the opinions of all the respondents. The consolidated list is then returned to you for a second round. In this round you may agree or disagree with your colleagues. This should take no longer than **10 minutes** to complete. Kindly respond to this email by **31 March 2011**.

Please be assured that your **individual response remains confidential**.

We realise that 30 minutes of your time is no small request and we would like to express our appreciation for your cooperation. All respondents will receive a **complimentary executive summary of the final report**.



### Answer sheet

Dear respondent

Please provide your view in the table below. Please feel free to either briefly list the features and factors or to describe your views more fully.

<b>Please provide your opinion as comprehensively as possible of all those features of bilateral air services agreements that you believe directly or indirectly affect air passenger traffic flows between two countries (any arbitrary country-pair)</b>	<b>Please list any other factors that you feel directly or indirectly have an influence on air passenger traffic flows between an arbitrary country-pair.</b>





28 July 2011

Dear Colleague

I would like to thank you for your cooperation thus far in the important research project on the relationship between South African aviation policy in Africa and air passenger traffic flows.

We have reached the second round of the questionnaire. As previously communicated the results of the first round have been consolidated for your further feedback. In this round the cumulative responses have been listed, with which you may agree or disagree. This should take you no longer than 15 minutes to complete.

Two answer sheets are attached for your convenience. The first one summarises the responses related to features of bilateral air service agreements that in your expert opinion may directly or indirectly affect air passenger traffic flows between an arbitrary country-pair. The second answer sheet summarises the responses related to any other factors that based on your expert opinion have an influence on air passenger traffic flows between an arbitrary country-pair.

Kindly respond to this email by 10 August 2011. Please be assured that your individual response remains confidential.

We realise that 15 minutes of your time is no small request and we would like to express our appreciation for your cooperation. All respondents will receive a complimentary executive summary of the final report.

Please send your feedback to the following address: [ssurovitskikh@gmail.com](mailto:ssurovitskikh@gmail.com)

This research is for academic purposes only, the outcome of which is the attainment of a doctoral degree and the publishing of articles in accredited scientific journals.

Please feel free to contact me or my supervisor Prof. Berendien Lubbe at [berendien.lubbe@up.ac.za](mailto:berendien.lubbe@up.ac.za) or tel: +27 12 420-4102 with any queries or problems.

We thank you for your kind co-operation.

Yours faithfully

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Please indicate with an “X” whether you agree or disagree with the following responses.

I believe that the following features of bilateral air services agreements directly or indirectly affect air passenger traffic flows between any arbitrary country-pair:

	AGREE	DISAGREE
Capacity clause		
Permitted number of airline designations/Designation clause		
Withholding/ownership clause		
Traffic rights/freedoms clause		
Market access/Named points clause		
Tariff/Pricing regime clause		
Cooperative arrangements clause		
Statistical exchange clause		
Double taxation clause (for example, respective airlines being reciprocally exempted from double taxation)		
Airport slot availability		
Strength of national/designated carrier		
Protection of national carrier through restrictive agreements		
Break of gauge provision		
Unstable political situation		
Degree of lobbying for increased bilateral agreements by the relevant parties in the country		
State of diplomatic relations between countries		
Lack of regional internal/common aviation market with harmonised rules		
Lack of reciprocity or equal exchange of rights amongst airlines of each state		
Propensity to declare disputes and to make use of dispute resolution provisions and ICAO in settling disputes		
Free riders: <ul style="list-style-type: none"> <li>• Access by non-designated airlines to BASA rights</li> <li>• 5th and 7th freedom rights where 3rd and 4th freedom rights do not exist</li> <li>• 5th and 7th freedom rights where 3rd and 4th</li> </ul>		

	AGREE	DISAGREE
freedom rights exist		
Development of 6th freedom carriage by intermediate based African airlines		
Development of 6th freedom carriage by intermediate based airlines in the Gulf and Europe		
Lack of updating treaties on inter-State level as opposed to MOUs on aeronautical authority level		
Lack of implementation/adherence to agreed conditions by African States		
National aviation policies		

Please add any other features of bilateral air service agreements that were not mentioned above but that you feel might have an influence on air passenger traffic flows between two countries.

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Please indicate with an “X” whether you agree or disagree with the following responses.

I believe that the following factors directly or indirectly influence air passenger traffic flows between any arbitrary country-pair:

	AGREE	DISAGREE
Existence or lack of free trade areas (free over border movement of passengers)		
Business/trade relations between two countries		
Existence of visa requirements and/or passport regulations		
Scope of competing airlines (reflects aggregate capacity, frequencies, number of city-pairs served, number of airlines offering competitive services)		
Capitalisation levels of competing airlines		
National geographic limitations of competition authorities (laws)		
Existence of precompetitive regulatory frameworks relating to subsidies and predatory conduct of airlines		
Standards of safety and operational oversight		
Requirement for local registration of aircraft		
Concerns for personal safety/fear of crime		
Disparity in noise and carbon emissions requirements		
Cultural affinities/historical relations between countries		
Level of labour (countries with excess of deficient labour capabilities will likely import/export labour)		
Special events (for example, significant sporting events)		
International investment by countries in other countries		
Affordability of air travel/Price		
Language differences		
Distance between countries		
Level of aviation-related infrastructure in a country		
GDP/state of economy in the country		
Infrastructure development		
Capacity (as implemented by the airlines)		
Aviation policy		
Political situation in the country		
Exchange rates (impacts on relative price levels)		
Personal financial ability to travel		
Tourism-related demand/Touristic attractiveness		

	AGREE	DISAGREE
State of diplomatic relations/Foreign policy		
World economic situation (for example recession)		
External health factors (such as SARS)		
Natural disasters		
Alignment of aviation policy and tourism policy		
Tax incentives		
Labour law		
Availability of other modes of transportation		
Economic policy (interest rates, anti-inflation policies, exchange rate controls, impact of indirect taxation)		
Reputation/Image of the country		
Existence of a national carrier		
Population size		
Ease of obtaining permission to exercise the rights granted in terms of BASA		
Airport slot availability (when not in BASA such as UK)		
Weather		
Anti-trust immunity for airline alliances and joint ventures		
Distribution of income/income inequality		
Degree of urbanisation/share of urban population		
Size of conurbation and catchment area of airports in origin and destination		
Excessive reliance on Yamoussoukro Decision as instrument for liberalisation and the selective and limited adoption of its provisions		
Lack of African regional agreement to the level of airline participation in competition to internationally and South African based airlines		

Please add any other factors not related to BASAs that were not mentioned above but that you feel might have an influence on air passenger traffic flows between two countries.

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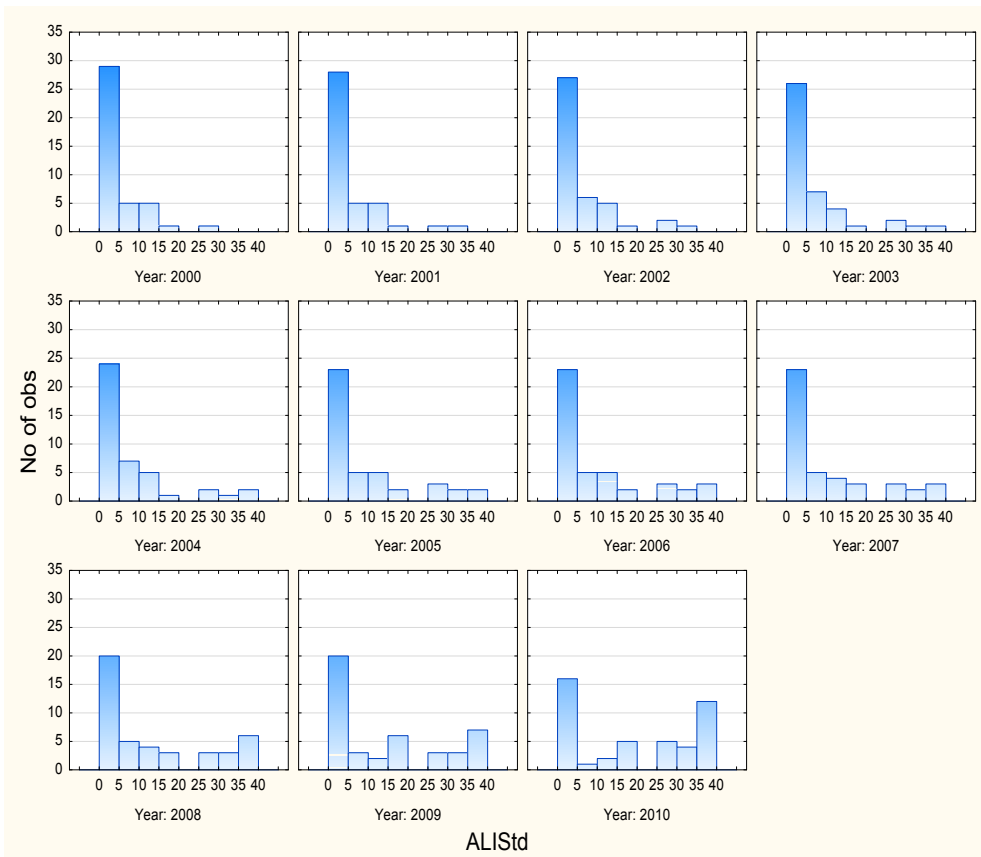
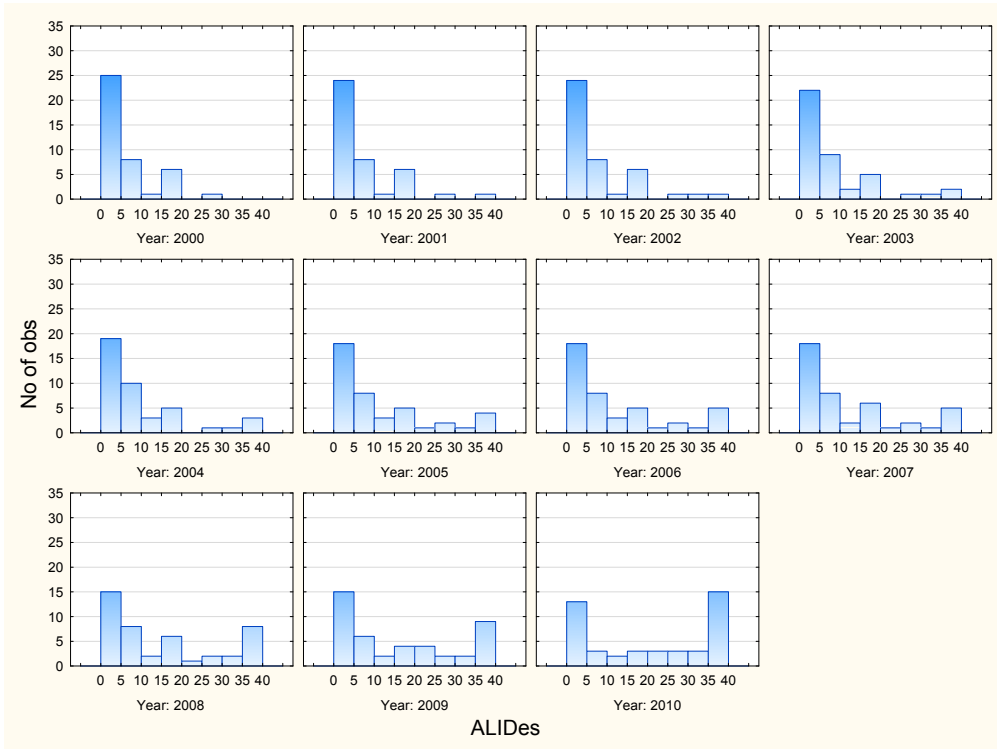
## **APPENDIX J**

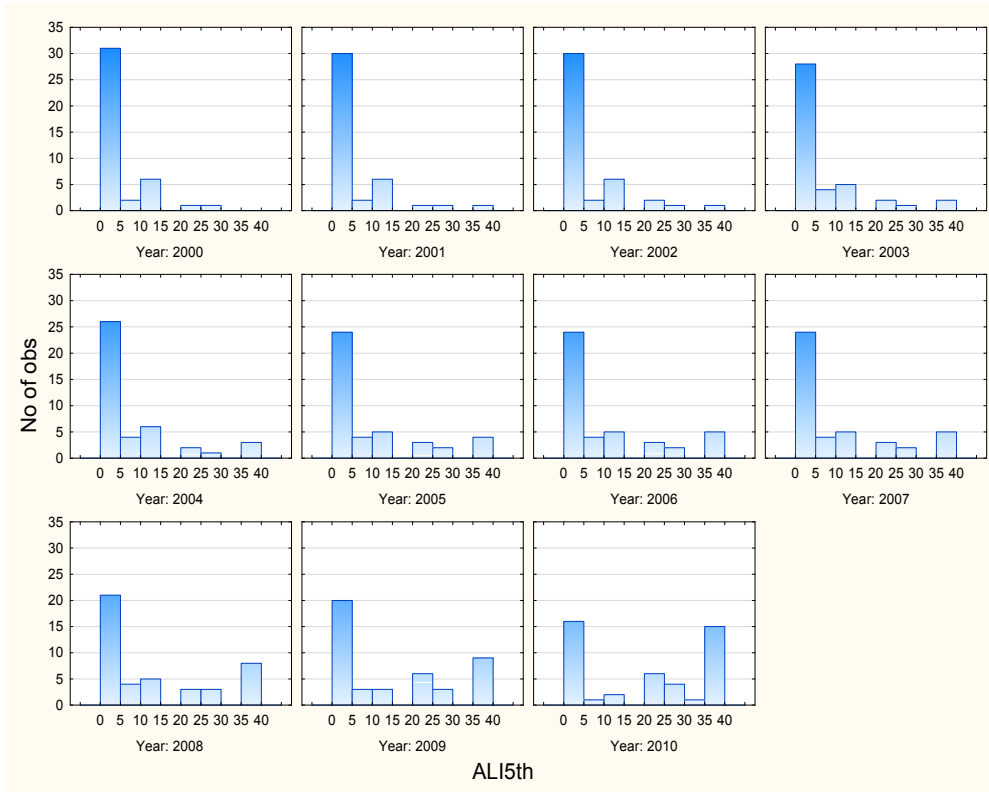
# **HISTOGRAMS OF THE DEGREE OF AIR SERVICES LIBERALISATION OF THE SOUTH AFRICAN – INTRA- AFRICAN AVIATION MARKET**

(FOUR VARIANTS OF THE ALI WEIGHTING SYSTEM)

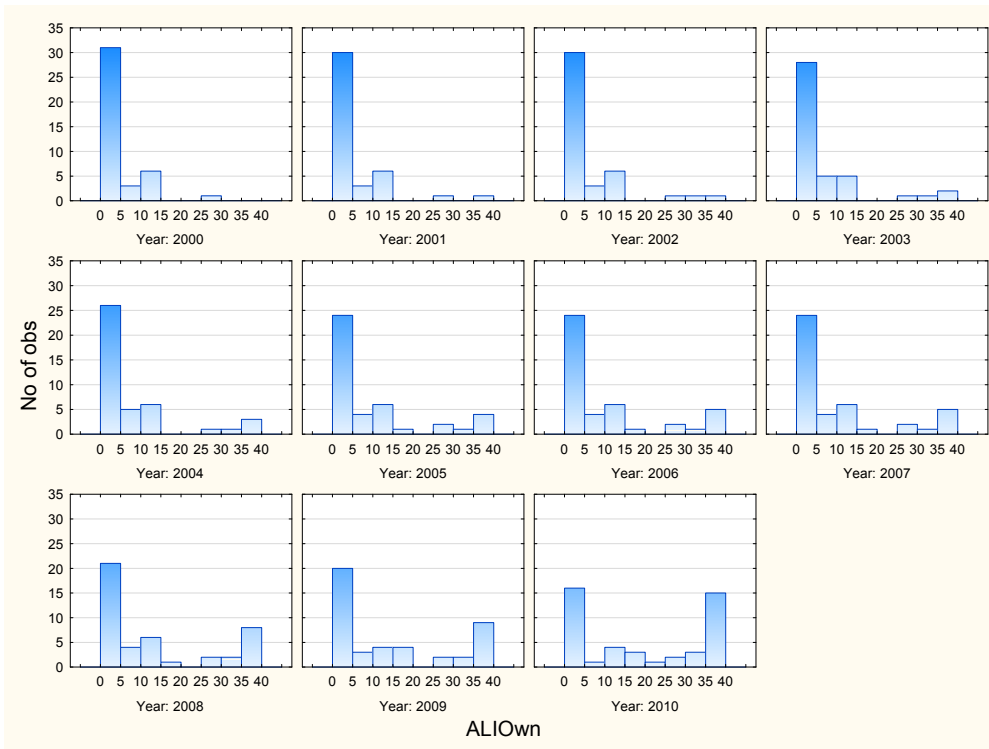
Source: Department of Statistics, University of Pretoria (2012)







ALI5th



ALIOwn

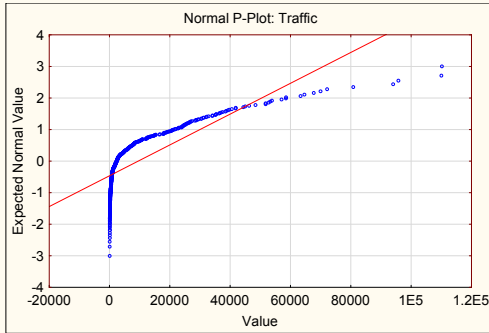
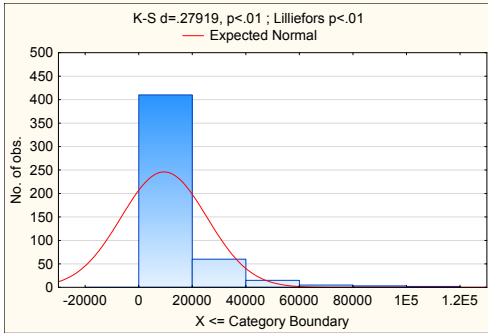
# APPENDIX K

## STATISTICAL SUMMARIES OF LOG TRANSFORMATIONS

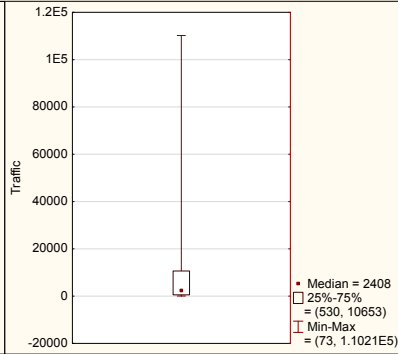
Source: Department of Statistics, University of Pretoria (2012)



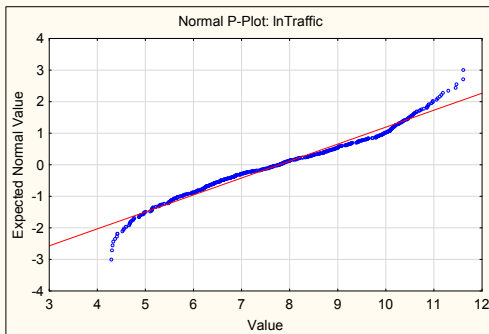
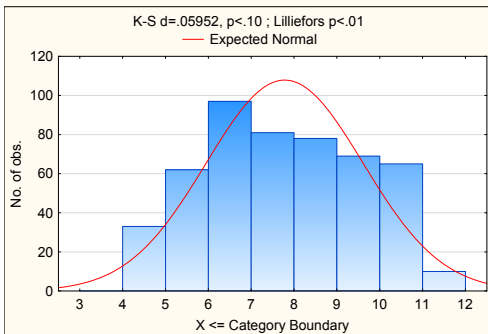
### Summary: Traffic: Traffic



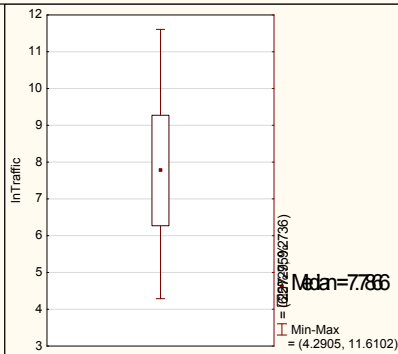
Summary Statistics:Traffic  
Valid N=495  
Mean=9465.678788  
Median=2408.000000  
Minimum= 73.000000  
Maximum=110213.000000  
Std.Dev.=16048.864617  
Skewness= 2.950437  
Kurtosis= 10.990482



### Summary: InTraffic

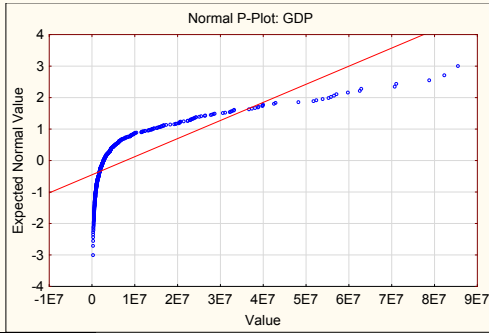
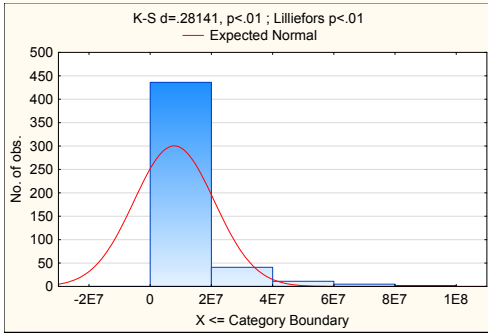


Summary Statistics:InTraffic  
Valid N=495  
Mean= 7.781330  
Median= 7.786552  
Minimum= 4.290459  
Maximum= 11.610170  
Std.Dev.= 1.830514  
Skewness= 0.031863  
Kurtosis= -1.033849

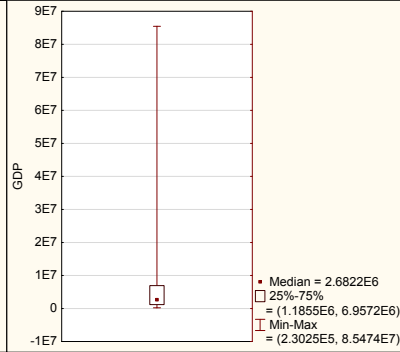




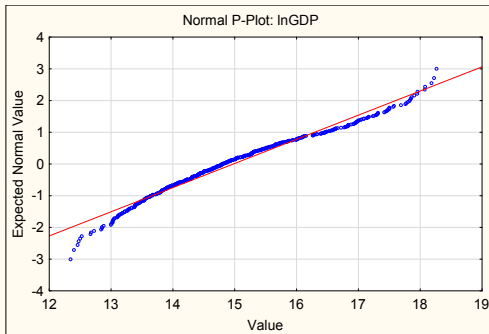
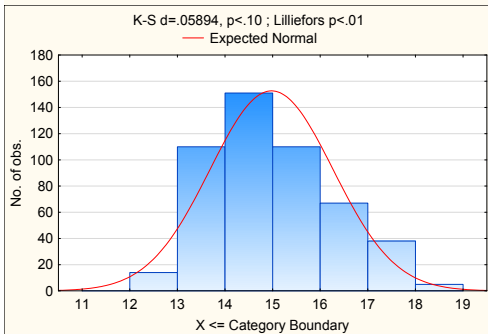
Summary: GDP: GDP



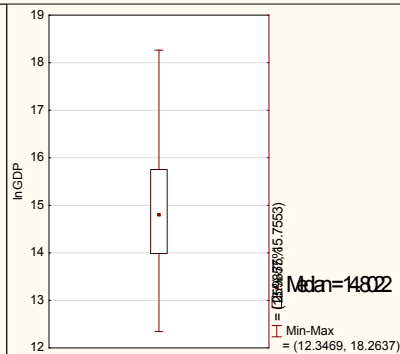
Summary Statistics:GDP  
Valid N=495  
Mean=7837352.505677  
Median=2682222.910000  
Minimum=230248.300000  
Maximum=85473606.410000  
Std.Dev.=13146259.046844  
Skewness= 3.103851  
Kurtosis= 10.793560



Summary: lnGDP

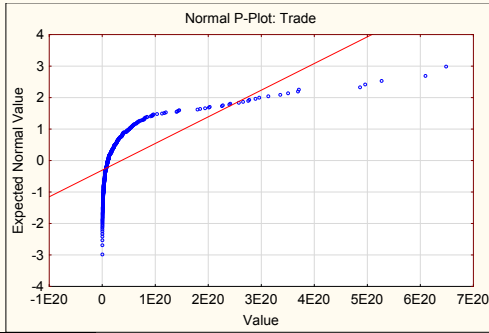
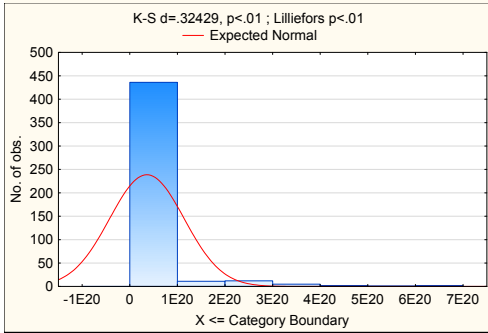


Summary Statistics:lnGDP  
Valid N=495  
Mean= 14.977830  
Median= 14.802156  
Minimum= 12.346914  
Maximum= 18.263718  
Std.Dev.= 1.293348  
Skewness= 0.443360  
Kurtosis= -0.437548



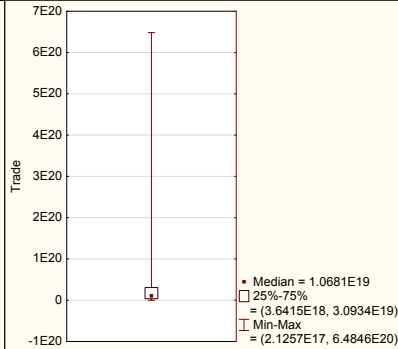


Summary: Trade: Trade

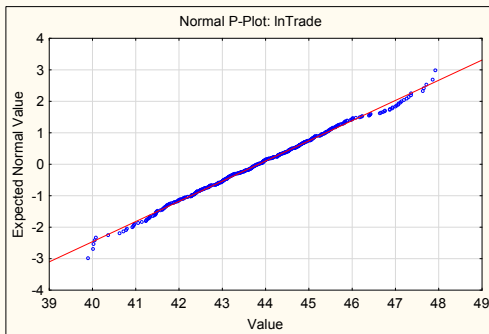
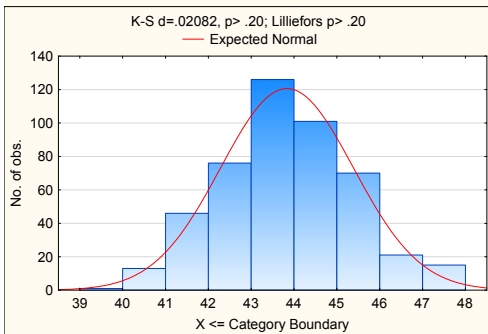


Summary Statistics:Trade

Valid N=469  
 Mean=35933890426439246000.000000  
 Median=10681000000000000000.000000  
 Minimum=21257000000000000000.000000  
 Maximum=64846000000000000000.000000  
 Std.Dev.=78383120297058583000.000000  
 Skewness= 4.524639  
 Kurtosis= 24.081549

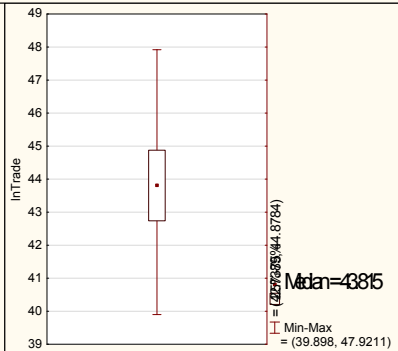


Summary: lnTrade



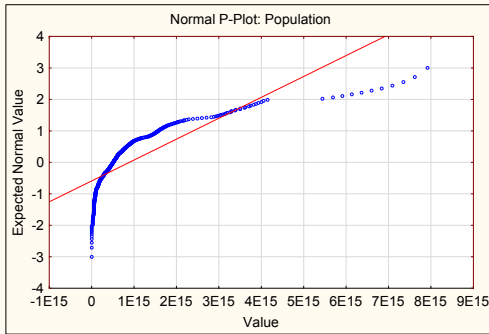
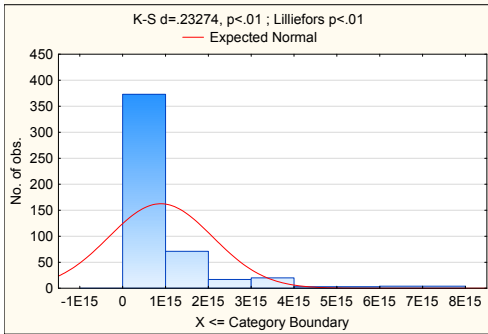
Summary Statistics:lnTrade

Valid N=469  
 Mean= 43.836586  
 Median= 43.814998  
 Minimum= 39.898048  
 Maximum= 47.921132  
 Std.Dev.= 1.551467  
 Skewness= 0.097207  
 Kurtosis= -0.193183



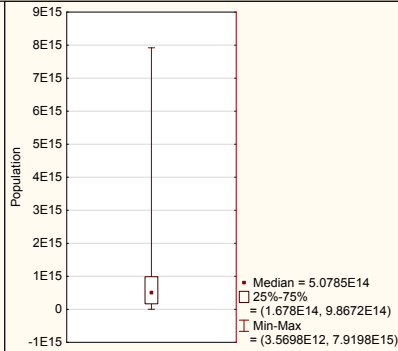


Summary: Population: Population

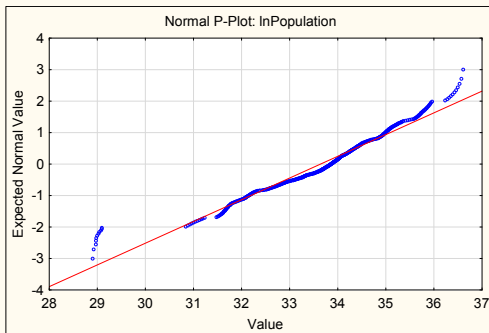
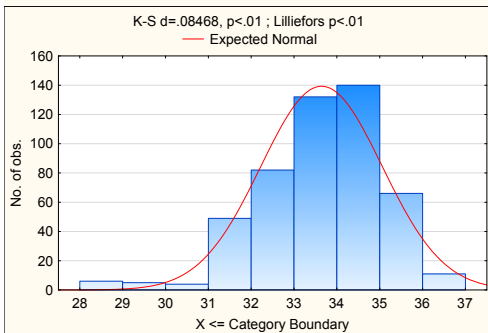


Summary Statistics:Population

Valid N=495  
Mean=890170024444444.750000  
Median=50785000000000.000000  
Minimum=356980000000.000000  
Maximum=79198000000000.000000  
Std.Dev.=1214739067439882.000000  
Skewness= 2.987451  
Kurtosis= 10.811163



Summary: InPopulation



Summary Statistics:InPopulation

Valid N=495  
Mean= 33.642578  
Median= 33.861207  
Minimum= 28.903531  
Maximum= 36.608142  
Std.Dev.= 1.417673  
Skewness= -0.712328  
Kurtosis= 1.011472

