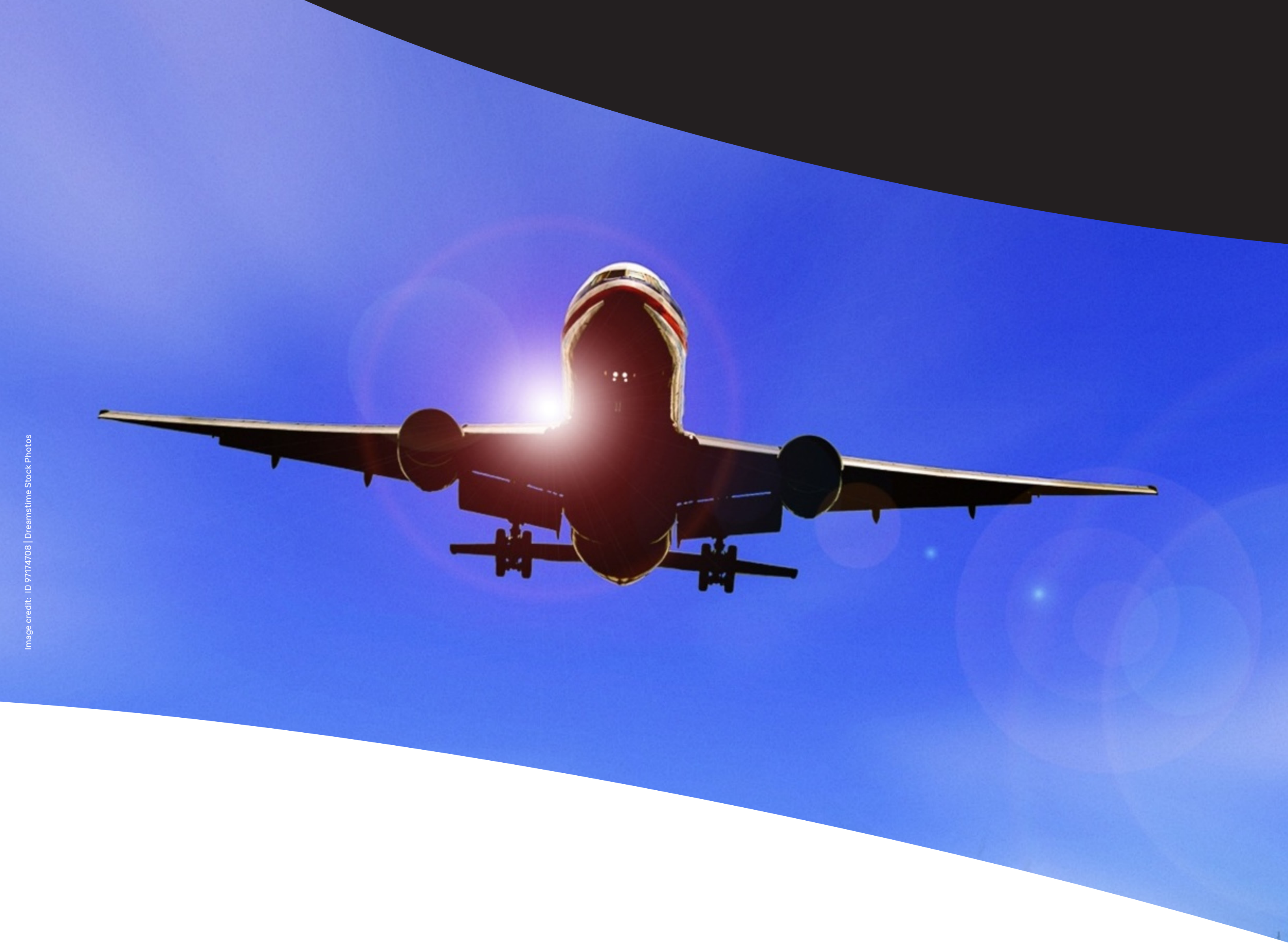
Annual Report 2017/18



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AIRLINES ASSOCIATION OF SOUTHERN AFRICA

AASA

The **Airlines Association of Southern Africa (AASA)**, is an organisation which was formed in 1970 to represent the mutual interests of its Members. Membership is open to all airlines based in countries south of the equator, including the Indian Ocean Islands. There are currently 19 Airline Members. In addition, Associate Membership is open to airline partner organisations. There are currently 34 Associate Members, including infrastructure service providers, several oil companies, major aircraft manufacturers, engine manufacturers, ground handling companies, service providers, other industry associations and partners.

AASA is the representative airline organisation within Southern Africa working together with the leaders of the aviation industry and senior public and Government officials on matters of policy, legislation, regulation, planning, operational efficiency, safety, security and finance, affecting the overall profitability of the airlines and their continued sustainability. AASA also leads and coordinates the airline industry position on airport, airspace and civil aviation issues, as well as consumer legislation, environmental and tourism matters, and provides media response to important industry issues. AASA's responsibility includes the representation of SADC-based airlines on the SADC Civil Aviation Committee as the Airline Consultative Member. AASA is also a regular participant and contributor to ICAO and IATA initiatives in the region.

With AASA's focus concentrated on any issue impacting the airline business, the regular liaison and good working relationship with its Members and partners is highly valued.

CONTACT DETAILS

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Introduction

1. Introduction

1.1 Scope

The **Airlines Association of Southern Africa (AASA)** herewith presents the 2017/2018 Annual Report detailing the activities and achievements during the year under review from 1 July 2017 to 30 June 2018. Work undertaken after the end of the financial year up to the 2018 Annual General Meeting to be held on 13 October 2018 is also included in this report.

AASA is mandated to represent the Chief Executives and their authorised representatives and act on matters of common interest to its Members. This work is undertaken in consultation with its Members and with public and private stakeholders.

The agenda for the past year has been very diverse, covering most areas of the airline business and related aviation activities. AASA leads and represents the airline industry in the Southern African region on behalf of its Members and appreciates the excellent working relationships with all stakeholders. These include leaders of the aviation industry organisations, as well as senior public, Government and private officials on all matters affecting the overall sustainability of the airline industry in the SADC region.

1.2 Brief Market Review

The Southern African airline industry has this year operated within a profitable global airline industry environment with projections of a very respectable US$33.8 billion net profit for 2018, slightly higher than the US$31.8 billion in 2017. The picture for African aviation is not as good with IATA projecting a US$100 million loss for Africa, and all indications that Southern African airlines will record a total loss of around US$ 300 million.

Passenger growth in Africa (including the Southern African region) is forecast to be 4.5% in 2018, well below the global 7% average growth. This is a disturbing trend with Revenue Passenger Km growth in Africa dipping below the global average during the past two years.

In South Africa over the past year, the airline industry has experienced fluctuating fortunes. This together with the South African GDP growth continuing to hover around 1% per annum has somewhat constrained the growth of the airline industry in South Africa to a point where for the year ending March 2018, there was an overall 4% growth in passenger traffic at the major South African airports. However, this has declined to an overall 0% growth for the period April to July 2018.

AASA's Airline Members all have their own individual challenges and operate in a highly competitive environment within their domestic, regional and international markets. Airlines in Africa work within a high cost environment, much of which is due to high dollar-based costs relative to their local softer currencies (e.g. jet fuel, aircraft procurement, leasing, distribution, maintenance, infrastructure charges, levies and taxes). Other focus areas include a need to ensure continuous improvement of safety and security, the training and retention of skills, and the development of a sustainable business model.

Within the context of the above brief overview, the work undertaken by AASA in our region will be highlighted in this report.

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2. AASA's Corporate Developments

2.1 Airlines Association of Southern Africa NPC

The Directors as at the date of compilation of this report are:

Adv. Mandi Samson, Chairperson
Mr. Miles van der Molen, Deputy Chairperson
Mr. Erik Venter
Mr. Chris Zweigenthal, Chief Executive Officer
Mr. Vivendra Lochan, Chief Operating Officer

2.2 AASA Executive Committee

Notwithstanding the establishment of AASA as an NPC and the appointment of Directors in terms of the MOI, the AASA Executive Committee (EXCO) remains responsible for the oversight of the Association and will refer specific decisions of the Executive Committee to the Board of Directors for approval as appropriate. During the year under review, the EXCO comprised the following members:

Adv. Mandi Samson, Chairperson (appointed 14 October 2017)
Mr. Miles van der Molen, Deputy Chairperson (appointed 14 October 2017)
Mr. Erik Venter
Mr. Rodger Foster
Mr. Musa Zwane (until 8 November 2017)
Mr. Nic Vlok
Mr. Vuyani Jarana (appointed 9 November 2017)
Mr. Chris Zweigenthal, Chief Executive Officer
Mr. Vivendra Lochan, Chief Operating Officer

2.3 AASA Staff

The AASA Staff compliment during the year under review was as follows:

Mr. Chris Zweigenthal, Chief Executive Officer
Mr. Vivendra Lochan, Chief Operating Officer
Mr. Charles Simelane, Finance Controller (appointed 17 July 2017)
Ms. Celeste Breedt, Personal Assistant and Secretary
Ms. Alice Saule, Office Assistant
Ms. Tatum Kok, Aviation Analyst (appointed 1 July 2018)

2.4 Membership Issues

During the year under review, the following organisation joined AASA as an Airline Member:

- **Proflight Zambia**

During the year under review, the following organisations joined AASA as Associate Members:

- **EFO College**
- **Cape Town Air Access**
- **Nordic Aviation Capital**

During year under review, no organisations left AASA as Airline or Associate Members. The Association currently has 19 Scheduled Airline Members and 34 Associate Members. The Membership is listed as Annexure A on the last page.

2.5 Black Economic Empowerment Accreditation

AASA's accreditation status for the year ending September 2018 was a Level 4. The process to achieve accreditation for the next year 2018/19 is currently underway.

2.6 Financial Matters

An Audit of the 2017/18 financial year has been completed by the external Auditors, Sizwe Ntsaluba Gobodo Grant Thornton, and these Annual Financial Statements and the Audit Report will be presented to the Annual General Meeting on 13 October 2018 for approval. The AASA Financial position is not published as part of the Annual Report, but in accordance with the Company's Act, the Financials of AASA are available at its office for scrutiny by authorised Members of AASA.

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3. Business Activities

3.1 Infrastructure Service Providers

3.1.1 Regulatory review process for Airports Company South Africa (ACSA) and Air Traffic and Navigation Services (ATNS)

AASA has continued to participate in the regulatory review process which will lead to the amendment of the Airports Company South Africa Act of 1993 and the Air Traffic and Navigation Services Act of 1993 in respect of the economic regulation of ACSA and ATNS. Both amendment bills are currently before Parliament, but deliberation has not as yet commenced on these Bills. In the interim, AASA actively participated in a working group to put together a first draft of regulations to underpin the legislation, once amended. The Department of Transport (DOT) has however in the interim decided to engage consultants to continue the regulation drafting process, and prepare final regulations for consideration of all stakeholders. As the amendment Bills are still subject to change, the drafting of regulations cannot be finalised until the Bills are signed into law. This process is expected to continue into 2019. In the interim, the Permissions proceed on the basis of the current respective ACSA and ATNS Acts.

3.1.2 Permission Programme

Both ACSA and ATNS submitted their Permission applications for the five year period from 1 April 2018 to 31 March 2023 in November 2017. Following further extensive consultation between the Regulating Committee, ACSA and ATNS, and the airline industry represented by AASA, BARSA and IATA, the Regulating Committee published a draft Permission on 26 April 2018 for both companies. There were further consultations between the Regulating Committee and all stakeholders leading to the Regulating Committee issuing a final Permission on 6 August 2018.

3.1.3 Airports Company South Africa (ACSA)

a. Permission Process

The final Permission issued by the Regulating Committee on 6 August 2018 has resulted in the following regulated tariff increases for ACSA:

2018/19	2019/20	2020/21	2021/22	2022/23
+5.8%	0%	0%	+3.3%	+3.1%

The Regulating Committee also approved the full CAPEX programme as agreed in consultations between ACSA and the industry, and included claw-backs due to the industry, as well as an increased efficiency factor. This led to a reduction in the final approved tariffs in the years 2021/22 and 2022/23 from the draft Permission. ACSA is currently assessing the impact of the final Permission.

b. Business and Operations

AASA continues to engage with ACSA on many business and operational matters, including the following:

- Support of the ACSA End-to-End Forum.
- Supporting ACSA's continued focus on the control of hand baggage being carried through security points by passengers.
- Discussions on envisaged controls on irregular-sized baggage to mitigate baggage handling system problems.
- Engagements with ACSA, the Airport Operator's Committee (AOC) and the Department of Home Affairs to ensure immigration points are adequately resourced with immigration officials.

ACSA has plans to construct a new head office complex at O.R. Tambo International Airport. This project is a commercial venture and not included as part of the Permission process. ACSA has advised that construction will commence shortly and it is planned that the first phase will be complete by August 2020 to enable it, together with its first tenant, the South African Civil Aviation Authority (SACAA), to move in. The airline industry has requested further clarity from the Regulating Committee on the funding of the project and its future impact on regulated tariffs, if any.

3.1.4 Air Traffic and Navigation Services (ATNS)

a. Permission Process

The final Permission issued by the Regulating Committee on 6 August 2018 has resulted in the following regulated tariff increases for ATNS:

2018/19	2019/20	2020/21	2021/22	2022/23
+7.5%	+0.5%	+5.0%	+0.6%	+2.1%

The Regulating Committee also approved the full CAPEX programme as agreed in consultations between ATNS and the industry. The final Permission for ATNS was a slight reduction on the draft Permission, largely as a result of an increased efficiency factor being applied. It has been agreed that a Financial Committee (FINCOM) will be established to biannually monitor the financial performance of ATNS, as well as the progress on its CAPEX programme.

b. Operations

AASA continues to engage with ATNS on operational matters. ATNS held its annual Operations Committee meeting (OPSCOM) on 23 July 2018. AASA Members were well represented by their respective Flight Operations management. The AASA/airline industry work with ATNS included participation in the ATM/CNS Coordinating Committee meetings and the six Working Groups being supported by airline experts:

- The NAMP and ASBU Working Group.
- The e-TOD Working Group.
- The AIXM Working Group.
- Met/Space Weather Working Group.
- Airspace and Route Efficiencies Working Group.
- Future Surveillance Working Group.

AASA will continue to support initiatives to improve airspace operational efficiencies including the PBN Implementation Plan; participation on the Slot Coordination and Slot Performance Committees; and ensuring ATNS, ACSA and airline issues are addressed as necessary to improve the on-time performance of airlines.

ATNS has plans to construct a new head office complex at its Isando property site. Further consultations with the airline industry are planned to discuss the project in more detail. The airline industry has requested further clarity from the Regulating Committee regarding the funding of this project and the potential impact on regulated tariffs. A date for the commencement of construction of the first phase is set for 2019.

In respect of both the ACSA and ATNS head office developments, the airline industry is concerned at the current cost projections and potential duplication of commercial facilities, and has requested both companies to engage on this matter whilst final consideration is being given to the projects.

3.1.5 South African Weather Service (SAWS)

The Advisory Committee for Aeronautical Meteorological Services (ACAMS) is held every quarter and chaired by SAWS with representation by the aviation industry, including AASA. The issues discussed include technical, operational and new technology matters for enhanced service provision to the industry, as well as new CAPEX programmes. In the future these discussions will be communicated through and integrated into the annual tariff discussions. The issue of space weather is now on the ACAMS agenda as well, and will be coordinated with the work of the ATNS ATM/CNS Coordinating Committee working group on space weather.

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Following consultations between the Regulating Committee for Meteorological Services (RCMS), SAWS and the industry, the RCMS determined a 1% reduction in SAWS charges effective 1 April 2018. Consultations have commenced for the determination of tariffs to become effective on 1 April 2019, with the first full consultation meeting having taken place on 20 September 2018. It is anticipated that these consultations will be completed by the end of November 2018, with a final determination by the RCMS, and approvals thereafter being requested by the Minister of Environmental Affairs.

3.2 African Aeropolitical Issues

3.2.1 SADC Civil Aviation Committee (CAC) Issues

The 21st annual SADC Civil Aviation Committee (CAC) met in Mauritius from 20 to 22 June 2018. Due to the late change of the date of the meeting and conflicting diary commitments, AASA did not attend this meeting. The main projects receiving attention at this forum include the following:

- **Implementation of the Single African Air Transport Market (SAATM) through the Yamoussoukro Decision (YD)**

This project is currently being driven by the African Union (AU) as part of the flagship aviation project for Agenda 2063. To-date a total of 26 States have committed to SAATM and there is a concerted effort to get further States to commit. The AU and the African Civil Aviation Commission (AFCAC) are dealing with the institutional and regulatory processes necessary for the SAATM implementation. AASA will continue to participate in forums, working together with IATA and AFRAA where input is required, to ensure that airline interests are taken into account and reciprocal benefits for all parties are assured.

- **SADC Aviation Safety Organisation (SASO)**

This is currently the major focus area of the SADC Civil Aviation Committee (CAC). SASO has been established with its headquarters in Swaziland. It is currently being managed by an interim Executive Director and team. The SASO is funded by contributions from the SADC States. Work is being done to set up the structure for the appointment of a permanent Executive Director and team. Long-term funding options continue to be considered for SASO, and AASA will continue to be involved in these discussions. AASA has continued to voice objections to the one solution which is to introduce a regional safety levy to fund SASO.

- **Upper Airspace Management Centre (UAMC)**

This project is not currently moving forward as issues between the military and civil control of airspace remains a challenge to be addressed. No time lines are available for this project.

3.2.2 Blocked Funds

In the year under review, AASA joined an IATA delegation to Angola to encourage the Angolan Government to allow the repatriation of funds to the home State of airlines operating to Angola. Progress has been made in this area, and where necessary, AASA will continue to support the work of IATA which continues to lead this process on a global basis.

3.3 Department of Transport (DOT), South Africa

AASA works closely with the Department of Transport (DOT) on the development of policy, strategy and its implementation. The following issues have been raised this year:

- **Slot Coordination Committee and Slot Performance Committee** (refer to **3.1.4c**)

AASA is an active participant in these two Committees. During the past year, concerns have been raised regarding deteriorating on-time performance and this needs to receive attention through operational engagement between industry, and both ACSA and ATNS. Achieving better alignment between the schedule, airport and CTOT slots requires further attention. Airlines are encouraged to raise issues through AASA for discussion at the Committees. The priority remains finding ways to improve the efficiencies of slot management, and addressing challenges that impact airline operations.

- **ICAO State Letters**

AASA obtains and provides comment and feedback from Member specialists to the DOT as appropriate, on proposed amendments to policy, standards and recommended practices being proposed by ICAO where they will impact airlines.

- **Planning meetings for South African, SADC-based and International Conferences**

AASA supports and participates in meetings or conferences relevant to international bodies, including SADC CAC, AFCAC, and ICAO Meetings.

- **National Facilitation Committee**

This Committee convened under the Chairmanship of the DOT, met once during the past year.

- **Broad-Based Black Economic Empowerment (B-BBEE)**

AASA is involved as the coordinating body for domestic scheduled airlines on the B-BBEE Aviation Charter aligned to the new Codes of Good Practice. During the past year, there has been no further progress with respect to finalising the new Transport and Aviation Charter. As advised by the DOT, this project is contingent on the appointment of a new Transport B-BBEE Council by the Minister of Transport. No time line has been provided for this.

- **Regulating Committee of ACSA and ATNS**

The DOT is the Secretariat of this Committee. As recorded under **3.1.1** to **3.1.4**, AASA is a key stakeholder together with its Airline Members and other members of industry, meeting with the Regulating Committee during the course of the Permission consultations with ACSA and ATNS.

- **Cape Town Convention**

The DOT is the lead department and is supporting the industry in its quest to develop amendments to the legislation (CIIME Act of 2007), and regulations to enable South Africa to be placed on the OECD Cape Town list (refer to **3.9.1**).

- **Legislation and Regulations**

AASA is part of the team working with the DOT and airline representatives on the review of the Civil Aviation Act of 2009; the Air Services Licensing Act of 1990; and the International Air Services Licensing Act of 1993 (refer to **3.9.3** and **3.9.4** respectively). In addition, AASA has taken an active role in the development of regulations to support the amendments to the ACSA and ATNS Acts (refer to **3.1.1**).

3.4 South African Civil Aviation Authority (SACAA)

AASA works closely with SACAA in several areas, including the following:

- **Civil Aviation Regulations Committee (CARCOM)**

AASA is an active member of CARCOM and participates in sub-committee work as necessary. AASA encourages experts to participate in sub-committee work. Areas of progress this year include the following:

  - **Flight and Duty Regulations and Standards**

  Several consultations have been held between the SACAA, ALPA-SA, AASA and domestic airlines. AASA engaged consultants to assist with the assessment of the ALPA-SA proposal in comparison with the current FDP, and programmes from other jurisdictions such as the EU, USA, Australia and Canada. At a meeting on 17 May 2018, AASA presented its proposal that the EASA programme (from the EU) be considered as a base from which to develop an amended programme for South Africa. The SACAA is currently considering its position and will convene a further workshop at the end of October/beginning of November 2018 with industry to discuss the way forward.

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- - **Regulations for Passengers with Disability**

    The review of the proposed amendments to the relevant clauses of Part 91 was completed by the work group and sub-committee, and approved by CARCOM. Upon submission to the Minister of Transport for signature into Regulations, the DOT section responsible for Universal Design and Access raised several areas of concern on the terminology being used in the proposed regulations. These concerns were also supported by some associations representing passengers with disability. In addition, the Universal Design and Access section raised a number of concerns on some of the practices being undertaken by airlines in caring for passengers with disabilities. Following a visit to O.R. Tambo International Airport, the Universal Design and Access section drew up a report on their views and findings and submitted this to the airline industry for comment. The status of this project is that AASA will request the SACAA and the DOT to provide guidance on what issues should be dealt with as part of the amendments to regulations for passengers with disability, and what issues should be referred to a forum for Universal Access coordinated by ACSA where these matters need to be dealt with.

- **National Airspace Committee (NASCOM)**

AASA participates as a member of NASCOM and consults with airline specialists where necessary to ensure that airspace design amendments are in the interest of safety, and do not inhibit the development of commercial airline services. The current main area of interest to AASA Members is the Square Kilometer Array (SKA) project. This project continues to cause great concern for AASA and the airline industry, and its concerns are shared by the DOT, SACAA, CAASA and BARSA. During the past year the aviation industry issues have not been dealt with by the Department of Science and Technology (DST) and the SKA project team. Recently, the DST intimated that the airline industry had not recorded any objections to the project. This led to the aviation industry, including AASA, forwarding its earlier correspondence where such concerns had been raised. A technical solution is required as both the SKA project and the aviation industry need to co-exist without disruption to one another.

- **Finance**

AASA has consulted with the CAA regarding the following proposed changes in tariffs:

- - **Passenger Safety Charge (EV on the airline ticket)**

    On 1 April 2018, the charge increased by CPI of 5.9% to a level of R23.61. As the approval for forthcoming increases is required by the Minister of Transport and the Minister of Finance, and is fairly lengthy, the process for the next two years' increases has commenced. The SACAA has proposed a CPI +1% increase, and industry has supported this CPI increase. The final decision will be made by the Ministers.

- - **Fuel levy**

    For non-scheduled operations this levy was increased by CPI of 5.9% to 16.4 cents per litre. As for the Passenger Safety Charge, the SACAA has proposed an increase of CPI+1% for the next two years.

- **Security**

A National Aviation Security Seminar was held from 1 to 3 November 2017. Unfortunately due to conflicting commitments, AASA was not able to be present.

- **Civil Aviation Authority Industry Liaison Forum**

This Forum, chaired by the Director Civil Aviation is held on a quarterly basis. This meeting deals with all matters affecting the aviation industry, including commercial scheduled airlines and general aviation. The main issues dealt with at this meeting include the performance of the SACAA against targets set by the DOT; improved efficiencies (e.g. the implementation of the new computer system); accident statistics; and specific safety and security-related matters. Airlines have been invited to attend.

- **Civil Aviation Authority Forum with Airlines**

Following the successful meetings held in 2017, the SACAA convened a roundtable workshop on 12 February 2018 to discuss many areas of concern both from the SACAA and airline industry perspective.

Following this workshop AASA, the domestic airlines and the SACAA have continued to follow-up and try to resolve areas of concern. A further meeting is convened for 2 October 2018, and a further roundtable meeting will be arranged in either November 2018 or early 2019.

- **Environment**

The SACAA has the responsibility of monitoring and managing the process of emission reduction by airlines. AASA will work closely with the SACAA to ensure all requirements are met.

3.5 Aviation Jet Fuel Forum

The Aviation Jet Fuel Forum, convened by ACSA, has not held meetings during this past year. The next meeting was to deal with strategic planning and logistical supply issues, but the respective authorities and organisations required to present such plans, were not in a position to do so. It is anticipated that the Forum will be convened in 2019. Areas requiring attention include the following:

- **Interior Supply certainty:** long-term logistical supply of jet fuel to the interior, such as Gauteng by Transnet Freight Rail and Transnet Pipelines.
- **Clean fuels strategy**.
- **Supply at Cape Town International Airport:** due to the growth of Cape Town traffic, and the pressure on the road bridging from the harbor to the airport, consideration is now being given to the construction of a pipeline linking the harbor area with the airport.
- **Supply of jet fuel to Port Elizabeth airport:** including the development of Coega and possible closure of the fuel storage facility at Port Elizabeth harbor.

AASA continues to monitor fuel stock levels and work closely with all parties to ensure security of supply to all airports.

3.6 Department of Home Affairs, South Africa

In the year under review, we have worked together with the Department of Tourism in making recommendations to the Department of Home Affairs (DHA) to amend the Immigration regulations particularly as they impact the requirements of South African and foreign based minors under the age of 18 years to travel with birth certificates and to carry the necessary documentation and permission in the event that they are not traveling with either or both parents. Since the initial proposed amendment to the regulations was published for comment on 16 September 2016, discussions have been held to reach a satisfactory solution to the wording of the regulations.

On 26 September 2018, the Minister of Home Affairs issued a statement on the proposed amendment to the regulations. This requires South African minors not to carry copies of their birth certificate with them if the names of the parents are included in their passport, but to carry authority letters with them if they are not travelling with either or both parents. For foreign children, and depending the visa requirements to visit South Africa, there is a strong advisory to carry documentation with them in the event that the Immigration official requests it. This is not ideal but is an improvement and a compromise to a difficult situation which needs to be refined and improved upon with time. Further developments in respect of the expansion of the biometric systems, e-visas, e-passports are under consideration by the Department of Home Affairs.

3.7 The Environment Challenge

3.7.1 Global Initiatives

Following the 39th ICAO Assembly where agreement was reached on Global Market Based Measures under CORSIA, during the past year, the focus was on developing and approving the Standards and Recommended Practices (SARPS) to support the CORSIA implementation. ICAO approved the SARPS in June 2018. Notwithstanding whether States have volunteered to participate in CORSIA from 2021, all States are required to comply with the requirement to report their international flight emissions with effect from 1 January 2019. This requires that airlines submit their draft Emissions Monitoring Plan (EMP) by 30 September 2018 for approval by their State by 30 November 2018 for implementation by 1 January 2019 (some States do have different target dates but the 1 January 2019 report date is set). AASA continues to follow up with its Members to ensure that they will be compliant. Several States, e.g. South Africa and Namibia have held workshops for the Stakeholders to ensure that everyone is aware of the requirements, and AASA encourages Airline Members to speak to their States who still need to brief their Stakeholders to arrange this. AASA has forwarded documentation on workshops held and which it has attended to its Airline Members. To-date 73 States have committed to participate in the voluntary pilot phase and first phase of CORSIA, with the African States of Burkina Faso, Kenya, Nigeria, Gabon, Zambia, Botswana and Namibia having volunteered.

3.7.2 South African Issues

AASA has interacted with the Department of National Treasury on Environmental issues. The Department issued a second draft of the Carbon Tax Bill for comment in late November 2017 and AASA forwarded comment as required by 8 March 2018. AASA has maintained its position that domestic aviation should not be subject to Carbon Taxes but a scheme should be developed incorporating the principles of CORSIA to both international and domestic aviation. This is to avoid the necessity of airlines having to manage two separate systems for domestic and international aviation respectively. The Department has been receptive to allowing a greater percentage of carbon offsets for domestic aviation, but carbon taxes will still be applicable to domestic aviation. The Department has noted its intention to finalise the Carbon Tax Bill and to implement the programme if possible during 2019. AASA will continue to monitor this process and keep all stakeholders advised.

The Department of Environmental Affairs is in the process of developing Greenhouse Gas Emission Performance Guidelines that could be used to guide the climate change mitigation assessment in processes such as environmental authorisation to allow carbon budget space allocation to new entrants into the market. The Department is also in the process of developing South Africa’s Long-Term Low Greenhouse Gas Emission Development Strategy (LEDS) up to 2050. This strategy will be used as a country’s blueprint to support the transition to a low carbon economy. AASA has had meetings with the DEA and its consultants and has raised concerns at the different initiatives being run by different departments within Government – involved departments are currently the DEA, DOT, (including the SACAA) and National Treasury. It has been noted that all initiatives must work together to ensure that airlines are not duplicating effort and are not required to follow different processes to achieve the same result i.e. reduce carbon emissions.

3.7.3 United for Wildlife – Against Wildlife Trafficking

AASA continues to support the United for Wildlife initiatives against wildlife trafficking. In addition, AASA also interacts with the World Wildlife Fund and distributes its material to Members. This is aimed at raising awareness amongst airlines and all their employees to be aware of this terrible practice and to be vigilant to identify and report any suspicious activity or package/bags that may be the vehicle for illegal wildlife trafficking. Airlines are encouraged to consider supporting the international initiatives and to sign up and join webinars or online programmes which continue to provide information and briefings on the latest developments.

3.8 Human Resources, Labour Relatios and Training

AASA’s involvement in Human Resources, Labour Relations and Training includes the following:

- **Management Committee of the Aerospace Chamber of TETA**

The Management Committee of the Aerospace Chamber was reconstituted during July 2018 and two representatives were appointed from AASA’s Members (South African Airways and Comair). The AASA representatives will continue to ensure the interests of the airlines are being addressed.

- **AASA Skills Development Training Programme**

During the year 2017/18, AASA arranged training programmes for the benefit of its Members’ employees and to promote transformation in the airline industry. A total of 326 employees from its Membership received training during the financial year 2017/2018 with the total trained to date amounting to 1557. Training courses offered were Customer Care, Commercial Aviation Management and Aviation Leadership.

- **Wonders of Aviation (WOA)**

The Executive Committee met on three occasions during the current year to review and discuss activities and plan for the future. The next Executive Committee meeting is scheduled for the 27th October 2018. An Awards event is also planned for the same day. WOA has been invited to participate in the AeSSA Conference to be held in Cape Town from the 23rd to 25th October 2018. WOA will also have a presence at the Brits Aviation Day planned for October/November 2018.

The following **WOA Educational Awards** have been completed to-date:

- Leadership Skills training.
- National Aerospace Centre (NAC)/Wits University Programme.
- Embraer tour of a new training facility in conjunction with Airlink.

WOA Award Winner achievements include the following:

- **Ms. Buhle Dlodlo** –hired by Hensoldt, a multinational aerospace company based in Munich. Accepted into a Masters Programme in Aeronautical Engineering at Wits University (with a scholarship).
- **Mr. Gift Kgadima** – passed 5 subjects towards his Commercial Pilot's License (CPL), and his Glider Pilot's License has been renewed.
- **Mr. Orifha Mbedzi** – received a scholarship from Accenture to study Information Technology.
- **Ms. Mahlatsi Mokonyane** – selected to participate in a South African Air Force (SAAF) programme in Cuba.
- **Mr. Frans Monakisi** – published his second book of poetry, is studying Biomedical Science, and founded an aviation-inspired clothing brand called *Runway 21*.
- **Mr. Elijah Rakoma** – studying Mechanical Engineering.

A detailed programme of activities is available on the WOA website: www.wondersofaviation-southafrica.org

WOA has participated in the following events and celebrations:

- Rhodesfield Technical High School Youth Month celebrations with South African Airways (SAA).
- Wind Tunnel Tour experience hosted by the Council for Scientific and Industrial Research (CSIR).
- Soweto Careers Day.
- TETA Exhibition.
- African Aviation Air Finance Africa Conference.
- Embraer's promotional tour of the latest RJ aircraft.

WOA has been successful in securing a grant from the International Society of Transport Aircraft Trading Foundation (ISTAT) to develop a LinkedIn database of future aviators. WOA, a group of enthusiastic volunteers, will continue to make strides in promoting its objective of advancing aviation to the disadvantaged youth, thereby creating future aviators for the betterment of the industry. We appeal to all organisations to support the activities of WOA by way of contributions, be it financial or in kind.

- **IATA Training Fund (IATF) partnership with AASA**

From October to December 2017, AASA, in partnership with the IATA Training Fund, ran a series of IATA courses for the airlines in Southern Africa. A total of 125 airline employees attended the following courses:

- Station Ground Handling Management.
- Dynamic Pricing and Revenue Management.
- Deregulation and Open Skies, Alliances, Equity Partnerships and Strategic Partnerships.
- Network Fleet and Schedule Planning.
- Airline Business Models and Competitive Strategies.

This is an exciting initiative providing a cost-effective option of holding such courses in our region instead of requiring employees to travel, at significant cost, to international training centres. The cost of the course is covered by IATA, with the hosting cost carried by AASA (as part of its approved budget), and the hosting airline.

In addition, AASA arranged and funded an IATA course for 25 airline managers on Airline Leading Practices and Cost Reduction Strategies. These training courses will continue, subject to demand from our Airline Members to hold them.

3.9 Legal Matters

3.9.1 Convention on International Interests in Mobile Equipment (CIIME) and Associated Instruments (Cape Town Convention)

During the year under review, AASA has worked with the DOT to ensure that the latest draft of the proposed amendments to the CIIME Act gains the support of all Government Departments that need to be involved namely, Trade and Industry, Treasury, Public Enterprises, Justice and DIRCO. The Aviation Working Group arranged an Africa Workshop, hosted by the SACAA on behalf of the South African Government, on the Cape Town Convention in Cape Town on 19 and 20 June 2018. It was also attended by ICAO and Unidroit. This provided a forum to inform States, Airlines and organisations on the background to the Convention, the opportunities available if the State was included on the OECD Cape Town list, and provided the process and procedures that need to be followed to achieve inclusion on the list. On 21 June 2018, a workshop was held for South African stakeholders to review the progress made by South Africa and the way forward. This workshop, attended by the AWG, the DOT, SACAA, AASA, several Airlines as well as legal and banking stakeholders, identified certain amendments that should be made to the current draft. This is currently work in progress.

3.9.2 Consumer Protection Act, South Africa

AASA and BARSA are working together on the compilation of a simplified Industry Code to satisfy the requirements of the DTI, the National Consumer Commission (NCC), the Airline industry and the public. During the course of this year, further detailed consultations were held with the attorneys, IATA and the airlines on the draft and a revised draft was compiled by the attorneys and circulated. This should be the final draft for consideration by the airlines and once finalised, a decision will be made on the way forward.

AASA continues to escalate claims and complaints forwarded from the National Consumer Commission and the Consumer Goods and Services Ombud within Airline management and once again the attention to successfully resolving these matters by the airlines is appreciated.

3.9.3 Civil Aviation Act

Following the completion of the NEDLAC process in which AASA participated, it is understood that the Amendment Bill is currently before Parliament for consideration.

3.9.4 Review of Air Services Licensing Act and International Air Services Act

AASA has continued to participate in the process to review the Air Services Licensing Act 115 of 1990 and the International Air Services Act 60 of 1993. The intention is to combine both Acts into a single Act, the Air Services Act. Several consultation meetings and a review of the drafts have taken place during the course of this year. The DOT's legal department and the State Law Advisor's office has also reviewed the draft. Following the meeting held on 17 August 2018, a further review of the draft Bill is necessary. It appears that the DOT wishes to publish the draft Bill for public comment. However, the airline industry is still concerned about a number of issues that must be resolved. These issues will be documented and submitted to the DOT once the latest draft is made available to the working group. This is still a work in progress.

3.10 Department of Tourism, South Africa and Tourism Business

Mr. Zweigenthal is a member of the Board of Directors of the Tourism Business Council of South Africa (TBCSA). He represents AASA and the South African airline industry in travel and tourism forums providing the aviation perspective. AASA is active in supporting the Department of Tourism in the development of policy and strategy and attends the National Tourism Stakeholder Forum, and participates in Working Groups that concentrate on the Enablement of Air Access. In addition, AASA participated in a SADC workshop considering initiatives to promote tourism in the SADC region and has provided information on the current status of the aviation industry's activity and capacity in the region. With reference to the immigration issues raised under the Department of Home Affairs item in 3.6 above, AASA has also provided input to the Department of Tourism on proposals which were considered together with IATA, BARSA and TBCSA member organisations in trying to resolve the impasse on the proposed amendments to the immigrations regulations.

3.11 Transformation of the Industry

During the year under review, no further consultations have taken place between the DOT and aviation industry stakeholders. It is understood that the appointment of the new Transport Broad-Based Black Economic Empowerment (B-BBEE) Council by the Minister is a requirement, and that it will be given the mandate to complete the Transport Charter, including the Aviation Charter. Given the developments during 2017, when a revised and significantly changed draft of the Charter was submitted by a Working Group, not including airline industry representatives, it is expected that further consultations will be required to review the work done to-date, and to reach consensus among all stakeholders on the Aviation Charter and Scorecard. AASA has communicated with the DOT and awaits feedback on the way forward. In the interim, the existing Aviation Charter and Scorecard apply to aviation organisations which fall under this Charter.

3.12 Aviation Co-Ordination Services (ACS)

3.12.1 General

ACS is mandated by the airlines serving South Africa to provide certain common use services at South African airports which would otherwise have had to be provided at great cost potentially by the individual airlines themselves.

Chris Zweigenthal is a Director of ACS and Vees Lochan is an Alternate Director. Both Executives are involved in ACS activities through their roles on the respective ACS Board Committees and their appointment to the Board. A proposed new agreement between ACSA and ACS is under discussion and it is hoped that this can be finalised shortly. ACS, ACSA, AASA, and BARSA work closely to ensure that the ACS mandate under the oversight of ACSA and the SA Civil Aviation Authority is executed efficiently, effectively, safely and securely.

3.12.2 Hold Baggage Screening

ACS provides 100% Hold Baggage Screening (HBS) at all ACSA Airports as well as four non ACSA Airports Hoedspruit, Margate, Phalaborwa and Richards Bay. The planning phase of the project to upgrade and improve the current HBS equipment and process in line with TSA and EU requirements is progressing well. ACS has appointed a specialist Programme Manager to drive and manage this process. A date of 2022 has been set for the new equipment and process to be commissioned and implemented at airports in South Africa where ACS is responsible.

3.12.3 Baggage Reconciliation Services

ACS provides the Baggage Reconciliation System (BRS) at OR Tambo, Cape Town, Durban, Port Elizabeth, Bloemfontein, East London, George and Kimberley airports.

With the Ultra Electronics contract coming to an end in October 2018 after a ten year period, ACS put out a RFP for a new BRS contract and this was awarded to SITA. The process of installing and implementing the SITA BRS project has commenced and it is anticipated that this will be complete by end April 2018. The cooperation of all airline, airport, SITA and Ultra stakeholders in implementing this project is greatly appreciated.

ACS is also currently busy with the implementation of IATA Resolution 753, requiring all baggage to be reconciled at the arrival destination as well as on departure. The target date of end June 2018 was not met for the automated processes at the three main airports of OR Tambo, Cape Town and King Shaka

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International Airports. Where manual reconciliation is undertaken using Hand Held Terminals at the smaller airports, this can be undertaken by the airlines through their respective Ground Handlers. The automated solution at the three major airports will be completed in the first half of 2019.

3.12.4 CUTE and CUSS

ACS is responsible for the management, operation and maintenance of the Common Use Terminal Equipment (CUTE) and the Common Use Self Service (CUSS) kiosks at all ACSA Airports. In respect of CUSS, a total of 15 international airlines and 8 South African-based airlines offer services on CUSS, with four airlines currently on web kiosks.

3.12.5 Fast Travel

The Fast Travel initiatives improve self-service processes and introduce efficiencies into the passenger handling experience at the airports. The current status of the initiatives includes the following:

- **Check-in.** Implemented through the CUSS project. A total of 23 airlines use the CUSS kiosks spread over the 9 ACSA airports.
- **Document check.** The facility is available and requires activation by the airlines.
- **Re-booking.** The facility is available and requires activation by the airlines. Web kiosks have been installed and passengers have direct access to the airline websites to re-book flights as required.
- **Common bag drop.** A further pilot programme is being undertaken with two domestic airlines to refine the process. Once completed, it will be reviewed with the intention of implementing the process at ACSA Airports.
- **Self-boarding.** ACSA is currently planning the phased implementation of this initiative at its three major airports.
- **Baggage re-claim.** Kiosks have been installed at the major airports, and currently two airlines use these kiosks.

3.12.6 Cargo Screening

ACS performs Cargo Screening at OR Tambo and Cape Town Airports and is in a position to offer this service to the wider community as necessary.

3.13 Treasury and SARS matters, South Africa

3.13.1 SARS VAT Issues

AASA is working with the industry on two matters involving VAT:

- **ACS VAT Invoices**

  At this time, ACS does not issue VAT invoices to airlines for the collection of the UM charge. VAT is collected and paid over directly to SARS without claiming input VAT. Following advice by the Auditor General that it was concerned with the practice employed by ACSA in respect of the treatment of VAT on its Passenger Service Charge (ZA tax), ACS and ACSA engaged and initially agreed to approach SARS with a common solution. However, due to the nature of the relationships between ACSA, the Airlines and the passengers and ACS, a different approach to SARS by ACSA and ACS respectively is necessary. Both organisations will approach SARS with a request for a directive. ACSA and ACS will meet again and the details of the submissions will be finalised.

- **VAT on domestic legs of international flights**

  Following the issuing of a draft Interpretation Note by SARS where it proposed that the domestic leg of an international flight be standard-rated, AASA and BARSA engaged attorneys on behalf of the airline industry to submit a case disagreeing with this position and motivating why the domestic leg of an international flight should be zero-rated. This submission was made and on 14 September 2018 SARS issued Interpretation Note 103 with the decision that domestic legs on international flights as defined by the Convention are zero-rated. Fortunately, this means status quo to the way in which international flights are currently handled when they include a South African domestic leg.

3.13.2 Customs Rules and Regulations

Following a survey conducted by SARS on the Readiness Survey Feedback on the Reporting of Conveyances and Goods (RCG), SARS has decided to postpone its implementation to 1 November 2018.

3.14 AASA Standing Committees

AASA has established standing committees, comprising AASA, industry representatives and airline representatives to address specific matters in their areas of expertise. The following committees are in place:

- **Standing Committee on Safety**

  This Committee, chaired by Comair, meets quarterly and deals with flight and ground safety issues. This Committee encourages the sharing of safety information and experiences in the interest of creating greater awareness of and ensuring compliance with safety regulations and standards.

- **Human Resource Training**

  This Committee has not met during this year. The AASA representatives at the TETA Aerospace Chamber do exchange information on the developments at the meetings. Where necessary, meetings will be called by the AASA representatives.

- **Environmental Committee** (refer to **3.7.2**)

  This Committee was established to create awareness and provide information on the latest developments on climate change initiatives. The Committee did not meet during this year, but AASA has shared information with member representatives on CORSIA (including the ICAO SARPS, EMP requirements), the Draft Carbon Tax Bill and news regarding the intention to implement carbon taxes on domestic aviation. Meetings will be convened as required.

- **Flight Operations Committee**

  Following a need for the Heads of Flight Operations and Chief Pilots to address certain matters with the SA Civil Aviation Authority, AASA, with the support of the Director Civil Aviation, has arranged several meetings with the SACAA to address areas of concern. The last of these was a roundtable meeting convened by the SACAA in February 2018 and the next meeting will be convened by AASA either by end November 2018 or early in 2019. In the meantime, meetings have been arranged with the SACAA to deal with pressing matters. Such a meeting will be held on 2 October 2018.

AASA wishes to thank all Chairpersons and the Secretariat of these Committees, together with the expert representatives who are members of these Committees and participate so enthusiastically, for their commitment to achieve the goals of these committees.

3.15 47th Annual General Assembly

The 47th Annual General Assembly of AASA was held from 12 to 15 October 2017 at the Wild Coast Sun, Eastern Cape, and was hosted by Cemair. The Conference theme was **Building Human Capital for African Airlines**. The Assembly was opened by Mr. Sihle Zikalala, MEC for Economic Development and Tourism, KwaZulu Natal. A total of 275 guests attended a very successful Assembly.

4. Other Industry Involvement

4.1 IATA and Regional Airline Associations

AASA is the SADC-based Regional Airline Association, and works closely with IATA in ensuring implementation of its global mandate through the region. Mr. Zweigenthal attended the IATA AGM in Sydney, Australia from 3 to 5 June 2018. AASA participates where possible in IATA-convened workshops and meetings, and encourages attendance by Airline Members.

In addition, during the year under review, AASA worked together with IATA on user charges consultations in Botswana (amended aeronautical charges are still to be implemented) and Namibia (amended aeronautical charges become effective on 1 December 2018). AASA also joined the IATA team in efforts to try and get Governments to release Airline blocked US$ funds, for example joining a mission to Angola in July 2017. AASA also appreciates the assistance and guidance provided by IATA in ensuring that Airline Members are prepared to comply with the requirements for the reporting of emissions with effect from 1 January 2019, as well as preparatory work for those airlines whose States have volunteered for CORSIA effective 2021.

AASA values the excellent working relationship it has with IATA and its fellow Regional Airline Associations worldwide. Many share common challenges and the ability to share views and discuss possible solutions to similar problems is appreciated.

4.2 South African Industry Association Involvement

In addition to its liaison internationally and regionally, AASA also recognises and appreciates its close working relationship with several industry organisations within South Africa. This includes the Board of Airline Representatives of South Africa (BARSA), where there is also a shared interest in the business of ACS; the Aero Club of South Africa; the Recreational Aviation Association of South Africa (RAASA); and the Commercial Aviation Association of Southern Africa (CAASA). Mr. Zweigenthal is an Alternate Director on the Board of CAASA.

In addition, in the travel and tourism industry, Mr. Zweigenthal is a Director on the Board of the Tourism Business Council of South Africa (TBCSA). AASA acknowledges the important relationship with TBCSA, the umbrella association for the travel and tourism industry; the Association of South African Travel Agents (ASATA), an Associate Member of AASA; the South African Tourism Services Association (SATSA); the Federation of Hotel Associations of South Africa (FEDHASA); the South African Vehicle Rental and Leasing Association (SAVRALA), and many other associations and companies which are also members of the TBCSA and leaders in their fields. AASA promotes the airline industry interests within these forums.

5. Media and Conferences

AASA recognises the importance of ensuring a positive working relationship with the media. To ensure this, AASA's plan is to actively respond as quickly and as clearly as possible whether it be on media queries or articles to be written, or providing time for interviews, to ensure deadlines are met. It is important to ensure that the airline industry position is fairly and accurately reflected in the media through AASA, being the respected voice of the airline industry in Southern Africa. AASA regularly deals with all media including daily newspapers, industry publications, magazines, radio and television, for comment on industry developments and current matters. It is important to note that AASA is not to become involved in the internal business of its Members, and AASA appreciates the understanding of the media in this regard when AASA turns down an opportunity to discuss certain matters which fall into this category.

AASA attends business and aviation conferences and is often asked to speak or participate in panel discussions at such conferences. During the past year, AASA has participated in the following events:

- **20 October 2017:** Panel discussion at the Transport Month event organised by the DPE.
- **25 October 2017:** Panel discussion at the ATNS AVI Afrique event.
- **4 November 2017:** Aero Club Annual Awards.
- **9 November 2017:** SACAA Safety Seminar.
- **10 November 2017:** CAASA AGM.
- **12 to 14 November 2017:** AFRAA Annual General Assembly, Kigali.
- **15 November 2017:** Panel Discussion at the IATA/AFRAA/ICAO/AFCAC Aeropolitical Forum.
- **24 January 2018:** IATA CORSIA workshop, Johannesburg.
- **16 to 19 April 2018:** IATA Safety and Flight Operations Conference, Montreal.
- **23 to 26 April 2018:** International Airline Symposium, San Francisco.
- **3 to 5 June 2018:** IATA AGM, Sydney.
- **23 May 2018:** Keynote address at the African Aviation Air Finance Africa Conference.
- **4 July 2018:** Air Namibia Stakeholder Convention, Presentation and Panel discussion.
- **4 September 2018:** CANSO Africa Annual Conference, Presentation and Panel discussion.
- **13 September 2018:** Namibia Civil Aviation Authority CORSIA Implementation Workshop presentation.

AASA appreciates the invitations and opportunities to participate and interact with all stakeholders at these events.

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6. Regional Issues

AASA has 19 Airline Members of which 10 are South African-based airlines and 9 are regional airlines based in Southern Africa and the Indian Ocean Islands. As a Regional Association, AASA has the mandate to deal with regional issues, which are brought to its attention or of which AASA becomes aware. AASA will assist and respond to matters similar to those dealt with on behalf of the airlines of South Africa on behalf of the regional airlines, and is involved on their behalf in the following projects:

- **SADC Civil Aviation Committee business**

  AASA is the only airline based organisation which has a seat as a consultative member representing the airlines at the proceedings at the Civil Aviation Committee (refer to **3.2.1**).

- **Environmental Issues**

  Involvement in consultations related to the implementation of CORSIA and its impact on airlines and States in the Region (refer to **3.7**).

- **Cape Town Convention**

  Ratification and inclusion of States on the OECD Cape Town list.

- **User Charges**

  AASA has joined IATA in user consultations with the Civil Aviation Authority of Botswana and the Namibia Civil Aviation Authority on proposed aeronautical increases in these States.

In addition to the above, regional airlines have access to documentation, proceedings and benefits arising from the many matters taken up on behalf of its Airline Members in South Africa.

Conclusion

7. Conclusion

Once again, the year under review, 2017/18, has been very active for the AASA team. Existing and ongoing projects require extensive attention, and new developments in the industry require AASA to add new projects to its portfolio. In addition to the projects noted in this report, the AASA team interacts with its Members and many stakeholders on a daily basis to address ad hoc issues not necessarily included in this report. These could include providing information requested, comment to media and other institutions requiring an AASA position on a particular industry matter. This makes our business exciting, with each day bringing forth new challenges to be dealt with.

On behalf of the AASA team, I wish to acknowledge the leadership and guidance of the Board of Directors and the Executive Committee of AASA who have supported the AASA team during the past year. In particular, I wish to thank Advocate Mandi Samson, Chairperson of AASA, Mr. Miles van der Molen, our Deputy Chairperson, for their strong leadership and willingness to assist and provide direction. My thanks go also to the rest of the Board and Executive Committee, namely Mr. Erik Venter, Mr. Rodger Foster, Mr. Vuyani Jarana, Mr. Nic Vlok and Mr. Vivendra Lochan, for their support and assistance enabling the AASA team to carry out its business.

I also recognise all our Members, both Airline and Associate Members, for their continued support throughout this year. Without Members, the Association does not have a reason to exist, and we rely on you our Members, to continually engage with us and raise new issues which require attention to improve your airline business and operational efficiencies. In particular, I thank all airline experts and representatives who have joined our many committee meetings and forums and provided such valuable insight and advice on many critical issues.

I also wish to acknowledge the commitment and loyalty of the AASA team who have supported the AASA Members and myself during the past year. Firstly, I recognise Mr. Vivendra Lochan, Chief Operating Officer, who has taken on the responsibility of sharing many projects with me, as well as continuing as the main convenor and organiser of the 2018 AASA Annual General Assembly at the AVANI Victoria Falls Resort, Livingstone, Zambia. In addition, I extend my sincere appreciation and thanks to our PA and Secretary, Ms. Celeste Breedt, who manages the office and plays a significant role in the events coordination for our Annual General Assembly; Ms. Alice Saule, our Office Assistant, who provides us with such necessary support to enable us to continue with the business of the day; to Mr. Charles Simelane, our Finance Controller, who after one year in the position, has made the AASA Finance portfolio his own; and finally to Ms. Tatum Kok, our Aviation Analyst, who joined us in July 2018 and has infused much energy into the many tasks and projects which have been directed her way.

And last but not least, our collective thanks go to Airline Industry Partners, Stakeholders, Government Departments and colleagues for the opportunities provided to work with you, to deal with issues and hopefully resolve them all with the object of achieving the goal of a sustainable airline industry in the Southern African region into the future.

Chris Zweigenthal
AASA, Chief Executive Officer

3 October 2018

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Annexure A:
A list of Members (as at 30 September 2018)

Airline Members

Air Austral
Air Botswana
Air Namibia
Air Zimbabwe
Airlink
CemAir
Comair Limited
Federal Airlines
Fly Blue Crane
Kulula
LAM Mozambique Airlines
Mango Airlines
Mozambique Express
Proflight Zambia
SA Express
Safair
South African Airways
Swaziland Airlink
TAAG Angola Airlines

Associate Members

Air Cargo Operators Committee (ACOC)
Air BP
Air Traffic and Navigation Services (ATNS)
Airbus
Airports Company South Africa (ACSA)
Amadeus
Association of South African Travel Agents (ASATA)
BidAir Services
Blake Emergency Services
Boeing Commercial Airplanes
Bombardier
Cape Town Air Access
CFM International
EFO College
Embraer
Engen Petroleum
FlightSafety International
Fujitsu
GE Aviation
Hahn Air Systems
Hi-Fly Marketing
Kruger Mpumalanga International Airport
Lanseria International Airport
Nordic Aviation Capital
Omni Air International LLC
Polokwane International Airport
Pratt & Whitney
PUMA Energy International
Rolls-Royce PLC
Sabre Airline Solutions
Shell Aviation
SITA
South African Weather Service
Swissport

2017/18 Annual Report

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