



AIRLINES ASSOCIATION OF SOUTHERN AFRICA



| Annual
Report
2020/21



The **Airlines Association of Southern Africa (AASA)** is the leading representative airline organisation within Southern Africa, working together with leaders of the aviation industry and senior public and government officials on policy, regulatory, planning, operational, safety, security and financial matters affecting the overall profitability of the airlines and their continued sustainability.

AASA was formed to represent the mutual interests of its Members. Membership is open to all airlines based in Southern Africa and the Indian Ocean islands. There are currently **17 Airline Members** from this region. In addition, Associate Membership is open to airline partner organisations. There are currently **35 Associate Members**, including Airports Company South Africa (ACSA), and airports, both provincial and private airports, the Air Traffic and Navigation Services (ATNS), the South African Weather Service (SAWS), several oil companies, major aircraft manufacturers, engine manufacturers, a ground handling company, IT service providers, tourism organisations and other industry associations and partners.

AASA 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. In undertaking this mandate, AASA represents the airline industry on approximately 15 Standing Committees and Boards involving both public and private stakeholders.

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Acronyms and Definitions

AAA-SA	Association of Airports and Aerodromes Southern Africa (an affiliate of CAASA)
AASA	Airlines Association of Southern Africa
ACAMS	Advisory Committee for Aeronautical Meteorological Services
ACS	Aviation Co-ordination Services
ACSA	Airports Company South Africa
AFCAC	African Civil Aviation Commission
AFRAA	African Airlines Association
AMS	Aeronautical Meteorological Services
ARCC	Aeronautical Rescue Co-ordinating Centre
ASATA	Association Of Southern African Travel Agents
ASIB	Aviation Safety Investigation Board
ATNS	Air Traffic and Navigation Services
AU	African Union
AUC	African Union Commission
AWG	Aviation Working Group
BARSA	Board of Airline Representatives of South Africa
BRS	Baggage Reconciliation Services
CAASA	Commercial Aviation Association Southern Africa
CARCOM	Civil Aviation Regulations Committee (SACAA)
CIIME	Convention on International Interests in Mobile Equipment (known as the Cape Town Convention)
CORSIA	Carbon Offsetting and Reduction Scheme for International Aviation (ICAO)
COPEX	Capital Expenditure
CPI	Consumer Price Index
CUSS	Common Use Self Service
CUTE	Common Use Terminal Equipment
DOT	Department of Transport (SA)
DST	Department of Science and Technology (SA)
ENREF	Engen Petroleum Ltd
FINCOM	Financial Committee
GAPP	Gauteng Area (or Airspace) PBN Plan
GBTA	Global Business Travel Association
HBS	Hold Baggage Screening
IATA	International Air Transport Association
ICAO	International Civil Aviation Organization
KCAAA	Karoo Central Astronomy Advantage Area
OECD	Organisation for Economic Co-operation and Development
NAC	Namibia Airports Company
NCAA	Namibian Civil Aviation Authority
OPEX	Operating Expenditure
OPSCOM	Operations Committee
PBN	Performance Based Navigation
RCMS	Regulating Committee on Meteorological Services
RNAV	Area Navigation
RNP	Required Navigation Performance
SA	South Africa
SAPREF	Shell and BP South African Petroleum Refineries (Pty) Ltd
SAR	Search and Rescue
SAATM	Single African Air Transport Market
SACAA	South African Civil Aviation Authority
SADC	Southern African Development Community
SARS	South African Revenue Service
SAWS	South African Weather Service
SKA	Square Kilometre Array (radio telescope project between Australia and South Africa in the Karoo)
TBCSA	Tourism Business Council of South Africa
TERS	Temporary Employer/Employee Relief Scheme
UFW	United for Wildlife
UIF	Unemployment Insurance Fund
USD	US Dollar
WHO	World Health Organization
WOA	Wonders of Aviation (SA and USA) NPO



1. Introduction



1.1 Scope

The [Airlines Association of Southern Africa \(AASA\)](#) Team herewith presents the 2020/2021 Annual Report detailing the activities and achievements during the year under review from 1 July 2020 to 30 June 2021. The work undertaken after the end of the financial year up to the 2021 Annual General Meeting, to be held on 28 October 2021, is also included in this report.

AASA is mandated to represent its Members, through their Chief Executives and authorised representatives, to undertake projects, initiatives and actions on matters of common interest to its Members. To ensure the success and buy-in of its Members, this work is undertaken in the spirit of consultation, collaboration and the involvement of its Members together with public and private sector stakeholders, as required.

The year 2020/2021 commenced at the height of the COVID-19 pandemic, with the [World Health Organization \(WHO\)](#) having declared COVID-19 a pandemic on 11 March 2020. Governments around the world, including governments in Southern Africa implemented risk-adjusted lockdowns commencing at the end of March 2020. These marked responses to the threat of the pandemic were observed around the world in various forms, according to levels and waves of infection in the respective countries and regions. This resulted in the imposition of stringent travel restrictions and in many cases outright prohibition of both international and domestic travel. Predominantly cargo services transporting essential goods such as medical supplies, and some intermittent repatriation flights for returning citizens were permitted to operate under strict controls. The lockdowns and resultant travel restrictions continued throughout 2020/2021, and well into 2021/2022.

AASA's focus was to advocate for the mobilisation of all possible support to minimise the adverse impact of the pandemic on aviation in the Southern African region. This involved intensive consultations with various arms of government, particularly the [Department of Transport \(DOT\)](#), [South African Civil Aviation Authority \(SACAA\)](#) and the [Department of Tourism](#) at Ministerial and Director General level. AASA and its associates lobbied for the relaxation of restrictions on travel and tourism. In addition, AASA urged for the provision of financial relief to enable industry recovery and a return to pre-COVID-19 business conditions. This included working with the [African Union Commission \(AUC\)](#), [African Civil Aviation Commission \(AFCAC\)](#), [African Airlines Association \(AFRAA\)](#) and the [International Air Transport Association \(IATA\)](#) to lobby for support for airlines across the region and throughout Africa. This work continued throughout 2020/2021, in addition to the normal business agenda, and all initiatives and activities undertaken on behalf of AASA Members.

AASA herewith reports on an extremely difficult year for the aviation, travel and tourism industry, characterised by the untold continued COVID-19 pandemic disruption and the intermittent commencement of gradual business recovery with the restart of operations.

1.2 The COVID-19 Pandemic and its Impact on Aviation

The COVID-19 pandemic continues to have a devastating impact on the global aviation industry across the board. The African aviation sector and Southern African aviation industry have not been spared. Initially what was anticipated to be a short-term crisis for the global community and the business sectors impacted by the pandemic, the COVID-19 virus turned out to be extremely virulent as States almost without exception, experienced waves of infections which are expected to continue to at least the end of 2022. The emergence of new variants and the intensity thereof can only be countered by the success of COVID-19 vaccinations through the global community with the intention of establishing significant (herd) community immunity. This has to be simultaneously supported through continuing adoption of the discipline required to maintain the basic protocols for the prevention of infections.

Government efforts aimed at reducing the number of infections and fatalities were extensive and aided by the active participation of all sectors of the economy including the travel industry. Governments across the SADC region and the African continent developed and implemented regulations as per their respective assessments

1. Introduction

of the risks in their countries. The Southern African governments, as well as most of Africa, implemented similar processes to mitigate the risk of transmission of the COVID-19 virus, dependent on the level of the infections.

The impact of COVID-19 on the aviation industry in South Africa for both domestic and international aviation is reflected in the following table:

PERIOD	TOTAL		DOMESTIC		INTERNATIONAL	
	Pax %	Flights %	Pax %	Flights %	Pax %	Flights %
DEC 2020 vs DEC 2019	-56.7%	-34.8%	-46.3%	-33.9%	-80.9%	-57.3%
JAN 2021 vs JAN 2020	-70.6%	-44.0%	-63.5%	-50.9%	-86.1%	-62.3%
FEB 2021 vs FEB 2020	-71.2%	-42.0%	-64.0%	-54.5%	-89.6%	-62.5%
MAR 2021 vs MAR 2019	-59.5%	-61.4%	-48.4%	-39.1%	-80.6%	-56.7%
APR 2021 vs APR 2019	-50.8%	-32.5%	-36.9%	-30.7%	-84.5%	-51.5%
MAY 2021 vs MAY 2019	-50.8%	-35.6%	-37.9%	-33.8%	-81.7%	-48.5%
JUN 2021 vs JUN 2019	-62.8%	-34.8%	-56.3%	-37.2%	-81.5%	-46.7%
JUL 2021 vs JUL 2019	-79.3%	-52.7%	-77.8%	-64.8%	-83.2%	-51.1%
AUG 2021 vs AUG 2019	-67.6%	-73.7%	-61.7%	-50.3%	-81.1%	-47%
SEPT 2021 vs SEPT 2019	-54.9%	-37.4%	-50%	-35.7%	-76.8%	-43%

This table indicates how the level of traffic was impacted by the changes of risk-adjusted levels throughout the pandemic as it developed. Operationally, changes to risk-adjusted levels caused disruption to both airlines and passengers, as several domestic airlines had to amend schedules where curfews were increased and passengers had to change flights at short notice. International flights were not subject to curfew. However, due to foreign State imposition of travel bans, the level of international passenger recovery remained within a band of 10 to 20% of pre COVID-19 levels following South Africa's lifting of its international travel restrictions on 1 October 2020.

Key points according to IATA's economic performance of the airline industry for the year under review includes:

- Airline industry is recovering gradually from COVID-19 but RPKs are still estimated to be only 40% of pre-crisis levels in 2021.
- Air Cargo has recovered above 2019 levels and is expected to strengthen in 2022 with the support of strong global trade.
- Vaccines will allow some governments to relax restrictions and support global travel to reach 61% of 2019 levels in 2022.
- The industry is forecast to make net losses of USD52 billion this year, cutting these losses to USD12 billion in 2022.
- Airlines are forecast to cut costs by 31% in 2021 vs 2019. As the traffic recovery continues, airlines will face cost pressures.
- Airlines continued to receive life support from their governments, totalling USD243 billion since the beginning of the pandemic.

Extent of **financial relief** or other assistance provided to airlines include the following:

- > Not aware of any direct financial aid provided to airlines. However, the [African Union \(AU\)](#) is looking at the feasibility of providing direct financial aid to airlines in Africa.
- > [Unemployment Insurance Fund/Temporary Employee Relief Scheme \(UIF TERS\)](#) provided relief to employees impacted by COVID-19, including the aviation industry.

> **User charges:**

- >> **Airports Company South Africa (ACSA)** and **Air Traffic and Navigation Services (ATNS)**: Took increases on 1 April 2020 and 1 April 2021 as provided for in the Permission. ATNS approved reversal of the 5% increase taken on 1 April 2020. To be refunded to the airlines affected and will be recovered in future clawbacks.
- >> **South African Weather Service (SAWS)**: Consensus on a 5% increase in charges effective 1 April 2021. Awaiting promulgation in the Gazette.
- >> **SACAA**: CPI increase proposed effective 1 April 2021. Promulgation in the Gazette awaited.
- >> **Namibia**: In principle agreement to **waive increase in charges and restructure the Passenger Safety charge** to a per passenger basis. Awaiting approval from the Namibian government.
- >> **Individual airline discussions with service providers** for payment deferment plans.

The impact of stringent restrictions necessitated by the rise in infections in March 2021 had an immediate and devastating impact, particularly on domestic traffic. Some domestic carriers revised their operations resulting in a reduction of 42% in flights and 50% decline in passengers from June to July 2021. The risk-adjusted levels were revised in August 2021 leading to a growth in passenger numbers as of September 2021.

1.3 Looking forward for the period 1 July 2021 to 30 June 2022

AASA's expected focus areas will include the following:

- Actively moving forward with strategic objectives as outlined in the AASA Strategic Priorities for FY21-FY22.
- High level engagement with Ministers, DG's of Transport and Tourism, and SACAA on the following issues:
 - > Lobbying for the appointment of International and Domestic Air Services Licensing Councils.
 - > Advocacy for strategic matters for the industry.
 - > Improving working relationships on the ground between SACAA and the airlines.
 - > Participating in the solution for the **Square Kilometre Array (SKA)** impasse between the DOT and **Department of Science and Technology (DST)**.
- Consultations with ACSA on the core areas of its Corporate Strategy that have a direct impact on the airlines. This includes the urgent resolution of the **Jet Fuel concession agreement** and **Ground Handling Licenses**, where ACSA wishes to have new arrangements in place by 1 April 2022. Industry is concerned over the lack of consultation to ascertain details, and lead times are insufficient to put new arrangements in place by the due date. Other areas e.g. cargo, aerotropolis and other business development initiatives also require attention.
- **ACSA and ATNS Permission**: Minister of Transport's final decision whether to allow current Permission to run for the full five-year period to 31 March 2023. Consultations between ACSA, ATNS and Industry to commence following this decision for the new Permission Period.
- **SAWS**: Consultations to commence with the Regulating Committee on Meteorological Services (RCMS) in respect of tariffs to be effective 1 April 2022.
- **Aviation Co-ordination Services (ACS)**: To reach agreement with ACSA on the continuation of ACS to provide its services, to obtain ACSA agreement for ACS to implement the urgent HBS like-for-like equipment replacement, and to move forward with the self-service replacement and upgrade projects.
- **Legislative matters**:
 - > **Cape Town Convention**: Preparation of amended legislation for full incorporation of provisions of the CIIME Act. Final drafting of regulations to support the amended legislation.
 - > **Air Services Licensing Amendment Bill**: Consultation between industry and DOT on submissions previously made and new matters as necessary.
- **National Civil Aviation Policy Review**: Once draft of policy is published by the government for comment, detailed consultation on proposals must be conducted with industry and comments/industry position must be done and communicated in writing. Consultation meeting with DOT is recommended.
- Participation in **ICAO's High-level Conference on COVID-19** held from 12 to 22 October 2021.
- Maintaining focus on **environment issues** and **illegal wildlife trafficking vigilance**.

2. AASA's Corporate Developments



2.1 Airlines Association of Southern Africa NPC

The Board of Directors as at 30 September 2021 are:

Mr. Elmar Conradie AASA Chairperson / FlySafair CEO (appointed 18 August 2020)
Ms. Agnes Khunwana AASA Deputy Chairperson / Air Botswana GM (appointed 17 March 2021)
Mr. João Carlos Pó Jorge LAM Mozambique Airlines DG (appointed 18 August 2020)
Mr. Aaron Munetsi AASA CEO (appointed 27 September 2021)
Mr. Vivendra Lochan AASA COO

2.2 AASA Executive Committee

The AASA Executive Committee (EXCO) as at 30 September 2021 remains responsible for the oversight of the Association and refers specific decisions of EXCO to the Board of Directors for approval as appropriate. During the year under review, the EXCO comprised the following members:

Mr. Chris Zweigenthal Chief Executive Officer (resigned 31 August 2021)
Ms. Wrenelle Stander Comair Limited CEO (appointed 15 July 2021/resigned 15 October 2021)
Mr. Aaron Munetsi AASA CEO (appointed 27 September 2021)
Mr. Miles van der Molen Cemair CEO
Mr. Rodger Foster Airlink CEO
Mr. Elmar Conradie FlySafair CEO
Ms. Thandeka Mgoduso South African Airways (SAA) Acting Chairperson (resigned 1 December 2020)
Mr. João Carlos Pó Jorge LAM Mozambique Airlines DG (appointed 18 August 2020)
Mr. William Ndlovu Mango Airlines, Acting CEO
Mr. Vivendra Lochan AASA COO

2.3 AASA Team

The AASA Team as at 30 September 2021 was as follows:

Mr. Chris Zweigenthal Chief Executive Officer (retired 31 August 2021)
Ms. Wrenelle Stander Chief Executive Officer (appointed 15 July 2021 and resigned 15 October 2021)
Mr. Aaron Munetsi Chief Executive Officer (appointed 27 September 2021)
Mr. Vivendra Lochan Chief Operating Officer
Ms. Tatum Kok Aviation Analyst
Mr. Charles Simelane Finance Controller
Ms. Celeste Breedt Personal Assistant and Secretary
Ms. Alice Saule Office Assistant

2.4 Membership Issues

During the period under review, the following organisations resigned as Airline Members:

- Air Mauritius
- Cemair
- Comair
- Kulula

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

- Cobra Aviation Group/FlyCobra

■ 2. AASA's Corporate Developments

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

- Royal Eswatini National Airways Corporation (RENAC)
- South African Tourism

During the period under review, the following organisations resigned as Associate Members:

- Ground Handling Assistance, S.A. (GHASSIST)
- Nacelle Aviation Capital
- Polokwane International Airport

The Association currently has **17 Airline Members** and **35 Associate Members**. AASA Members are listed as **Appendix A** of this report.

The Executives of AASA continues to engage in important dialogues with its Members in order to meet and/or exceed their expectations, ensuring the Association remains relevant to its Members. This is more vital now than ever before given the extremely difficult operating environment and the unprecedented, challenging financial conditions AASA Members find themselves in during this global pandemic.

2.5 Black Economic Empowerment Accreditation

AASA's accreditation status for the year ending 30 September 2021 is at Level 4.

2.6 Financial Matters

An Audit of the 2020/21 financial year has been completed by the external Auditors, Van Sitterts and these Annual Financial Statements and the Audit Report will be presented to the Annual General Meeting on 28 October 2021 for approval by the Members. The AASA financial position is not published as part of the Annual Report, but in accordance with the [Companies Act](#), the financials of AASA are available at its office for scrutiny by authorised Members of AASA.



3. Business Activities



3.1 Infrastructure Service Providers

3.1.1 Regulatory review process for ACSA and ATNS

The draft Amendment Bills of the [Airports Company South Africa Act, 1993](#) and the [Air Traffic and Navigation Services Act, 1993](#) dealing with amendments, particularly in respect of the economic regulation of ACSA and ATNS were signed into law by the President of South Africa on 4 March 2021. The provisions of the amended Acts will not be implemented until regulations underpinning the amended legislation have been promulgated. This work is expected to be undertaken during the next year.

3.1.2 Permission Programme for ACSA and ATNS

The 2018/19 to 2022/23 Permission is currently in operation. A new Permission was due to be implemented from 1 April 2021 and run for five years until 31 March 2026. However, due to the adverse impact of the COVID-19 pandemic and the uncertainty regarding traffic projections, the Minister of Transport approved a joint industry recommendation to delay the commencement of the new Permission by one year to 1 April 2022. With the COVID-19 pandemic raging throughout this past year, and bearing in mind the same uncertainty and financial challenges impact all the industry stakeholders, the Regulating Committee proposed a further delay to the commencement of the new Permission, effectively enabling the current Permission to run its full five years to 31 March 2023. The airline industry has supported this proposal and the Regulating Committee has submitted this recommendation to the Minister of Transport for approval. The industry anxiously awaits the approval by the Minister of Transport.

The airline industry associations attend the Regulating Committee convened Service Standards meetings which are held on a quarterly basis. The service levels are measured according to specific parameters and targets. Service levels have in general been maintained during COVID-19, although changes to risk-adjusted levels have impacted airport, air navigation services, airline operations, and passengers who are subjected to many protocols and procedures during their travel experience.

3.1.3 Airports Company South Africa (ACSA)

a. Permission: *Current 1 April 2018 to 31 March 2023*

ACSA completely reviewed their current and future Permission plans due to the impact of the COVID-19 pandemic. This resulted in the curtailment of the bulk of ACSA capital projects and the capping of CAPEX to a maximum of R1 billion per annum for essential maintenance CAPEX items. In addition, OPEX was reduced significantly. A voluntary severance package programme was implemented resulting in a reduction of ACSA employees.

The Regulating Committee has raised the question whether a k-factor adjustment should be considered for the year 2022/2023 due to the financial impact of COVID-19 on ACSA and ATNS. ACSA has motivated for a substantial k-factor increase to compensate for the loss of revenue due to reduced traffic activity. The airline industry does not support any k-factor increase as this would require the airlines and passengers as the users, who were also severely negatively impacted by COVID-19, paying increased charges to assist ACSA recover from its poor financial situation. The position of ATNS on the k-factor is not clear at this stage. Further discussions are envisaged within the next few months.

b. Permission: *New 1 April 2023 to 31 March 2028*

On the assumption that the Minister of Transport approves the extension of the existing Permission for a full five years, it is expected that consultation will commence towards the end of 2021. ACSA will need to re-commence its traffic forecast exercise and consult with industry on this, its CAPEX and OPEX programmes and proposed tariffs for the next five years.

c. Business and Operations

The focus has been on ensuring airline and airport operations are able to adapt and continue during the changing risk-adjusted levels of COVID-19. Due to the ACSA voluntary severance package programme, ACSA unfortunately lost some key operational personnel at certain airports, and this impacted their need to reduce certain Fire and Rescue category levels at some airports and curtail operating hours at some airports. It is imperative ACSA and airlines implement plans to ensure operations are not limited by these factors, and all parties are able to respond immediately to increased demand to generate additional revenue, so vital to accelerate industry recovery.

3.1.4 Air Traffic and Navigation Services (ATNS)

a. Permission: *Current 2018/2019 to 2022/2023*

During the year under review, ATNS reprioritised its CAPEX programme in consultation with the airline industry and is continuing with essential equipment replacement programs. ATNS has also reviewed its OPEX programmes due to the negative impact of COVID-19, and is considering a voluntary severance process for staff.

b. Permission: *New 2023/2024 to 2027/2028*

As for ACSA, assuming that the Minister of Transport approves the extension of the existing Permission for a full five years, it is expected that consultation will commence towards the end of 2021. ATNS will need to re-commence its traffic forecast exercise and consult with industry on this, its CAPEX and OPEX programmes and proposed tariffs for the next five years.

c. Operations

ATNS held its Annual OPSCOM on 26 July 2021. The OPSCOM meeting concentrated on the impact of COVID-19, on its operations and the airline industry. In addition, it dealt with the following major issues:

- CAPEX Project Status.
- Safety Performance.
- Innovation.
- Weather Radar Network.
- Magnetic Variations and Geomagnetic modelling.
- [Gauteng Airspace PBN Plan \(GAPP\)](#).
- Operational Efficiency.
- Aim Operations.
- Space Weather.
- Environmental Sustainability.

The one important take away from OPSCOM 2021 was the DOT Director General's support for aviation on the SKA issue. The DG has agreed with Industry that there must be an unconditional exemption for aviation with regards to the radio frequencies and bands that will impact aviation.

The CNS/atm Implementation Committee continued to operate effectively throughout the year, supported by the work done by the six working groups. This work will feed into the Industry Financial Committee (FINCOM) and Permission consultations which are expected to commence with industry by the end of 2021.

AASA will continue to support initiatives to improve airspace operational efficiencies including the PBN implementation plan, participation on the Slot Coordination Committee and Slot Performance Committee, and ensuring that ATNS, ACSA and airline issues are addressed to improve on-time performance.

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 that includes AASA. The issues discussed include technical, operational and new technology matters for enhanced service provision to the industry, as well as new CAPEX programmes. The requirements identified in these meetings will determine the CAPEX and funding requirements for SAWS and provide necessary input to the annual tariff discussions held between the Regulating Committee for Meteorological Services (RCMS), SAWS and the airline industry.

Following consultations between the RCMS, SAWS and the industry, consensus was reached on a tariff increase of 5% to be effective from 1 April 2021. Promulgation by the Minister of Forestry, Fisheries and Environmental Affairs is currently awaited. Consultations for the amendment of tariffs effective 1 April 2022 have commenced.

3.1.6 Namibia Civil Aviation Authority (NCAA) and Namibia Airports Company (NAC) Consultations

In the previous Annual Report, it was reported the [Namibian Civil Aviation Authority \(NCAA\)](#) and the [Namibia Airports Company \(NAC\)](#) advised that following consultations with industry during March 2020, they have recommended the postponement of tariff increases due to the pandemic, and supported the restructuring of the passenger safety charge to be on a per occupied seat basis, in accordance with industry's request. Increases of 80% and 67% for the domestic and international passenger safety charges have been published in the Government Gazette. AASA and IATA have jointly made representation strongly opposing these proposed increases. However, the approval of the Namibia Government is still awaited.

3.2 African Aeropolitical Issues

SADC Civil Aviation Committee (CAC) Issues

The SADC Civil Aviation Committee (CAC) meeting took place on 19 and 20 May 2021 on an online platform. The major items for discussion included the following:

- Effects of COVID-19.
- Status of the Implementation of the Single African Air Transport Market (SAATM) through the Yamoussoukro Decision (YD).
- SADC Aviation Safety Organisation (SASO).
- EU-Safety in Aviation Project.
- Support for ICAO Council Aviation Recovery Taskforce.
- Support for AFI Environment plan.
- Support for a coordinated common position for the Universal Safety Oversight Audit Programme (USOAP) Continuous Monitoring Approach (CMA) in liaison with AFCAC.

3.3 Department of Transport (DOT), South Africa

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

- **Slot Coordination Committee and Slot Performance Committee.** The DOT has approved the Slot Compliance waiver for all airlines for the Northern Winter period October 2021 to March 2022. Airlines are aligned to this position. No airline will be able to claim historic rights for slots allocated in the waiver period.
- **ICAO State Letters.** AASA obtains and provides comment and feedback including 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.
- **ICAO High-level Conference on COVID-19.** AASA is an active member of the Air Transport Committee and the Facilitation and Safety Stream Committees in preparation for [ICAO's High-level Conference on COVID-19](#) scheduled for 12 to 22 October 2021.
- **National Facilitation Committee.** This Committee, convened under the Chairperson of the DOT, met four times during the past year. The current focus of the Committee is the continued monitoring of facilitation measures that have been put in place to manage the pandemic, and ensure a smooth and coordinated re-commencement of air services following COVID-19.
- **Regulating Committee of ACSA and ATNS.** The DOT is the Secretariat of this Committee. As recorded under 3.1.1 to 3.1.4 above, 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.
- **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. The appointment of a new Transport B-BBEE Council by the Minister of Transport must still take place and they will be tasked with finalising the new Charter.
- **Cape Town Convention.** The DOT is the lead department in supporting the industry in its quest to develop amendments to the [CIIME Act of 2007](#), including regulations to enable South Africa to be placed on the [OECD Cape Town list](#). Refer to item 3.8.1.
- **Legislation and Regulations.** AASA is part of the team working with the DOT and airline representatives on the review of Civil Aviation legislation. During the course of the year, this has included proposed amendments to the [Civil Aviation Act 2009](#), the [Air Services Licensing Act, 1990](#) and [International Air Services Licensing Act, 1993](#) expected to become a single Air Services Act. Refer to 3.8.3 and 3.8.4 respectively.
- **Search and Rescue (SAR).** South Africa has the mandate to attend to all emergency response incidents occurring in its defined coastal waters. AASA is represented on the South African Search and Rescue Board and the Aeronautical Sub-Committee also known as the Aeronautical Rescue Co-ordinating Centre (ARCC). South Africa needs to demonstrate its SAR capabilities, and responsibility in responding to emergency calls with its military/civilian air and sea units. Airline emergency response plans have to be harmonised with the ARCC and the Airport Authority. AASA has been approached by the DOT to sign an MOU to act as a facilitator for long-range SAR capability. AASA sought clarification from the DOT on costs and resources involved. AASA is awaiting a response from the DOT.

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 which considers all proposed amendments to existing regulations and technical standards, and participates in sub-committee work as necessary. AASA encourages experts to participate in sub-committee work. A CPI increase for the Passenger Safety Charge was approved at CARCOM to be effective from 1 April 2021. For this to be implemented the Minister of Transport and Minister of Finance need to approve the increase. Both the Ministers have finally agreed, the increased Passenger Safety Charge will be introduced from 1 November 2021.
- **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 interests of safety, and do not inhibit the development of commercial airline services. The primary area of interest to AASA Members is the [Karoo Central Astronomy Advantage Area \(KCAAA\)](#) project or SKA project. Due to uncertainty over the applicability of the KCAAA requirements to aviation and the lack of alignment of regulations, this project continues to cause great concern for AASA and the entire aviation industry. Progress has been made, noting the support received from the Director General of Transport that the aviation frequency spectrum must be preserved. The proposed MOU between the DOT and the DST to enable this matter to be formally addressed and resolved has not been signed. Further technical meetings are required to address these concerns. In the meantime, aviation can continue to operate as is, without any constraints.
- **Civil Aviation Authority Industry Liaison Forum.** This forum, chaired by the Director Civil Aviation is held on a quarterly basis. This meeting addresses all matters affecting the aviation industry, including commercial scheduled airlines and general aviation. The main issues dealt with at this meeting included the performance of the SACAA against targets set by the DOT, activities with ICAO, incident statistics, and specific safety, security and industry-related matters. One of the major issues raised during this year was the severe impact of COVID-19 on the industry and the SACAA in particular. The DOT supported the SACAA with a grant to the value of R190 Million. In addition, safety statistics over the past year were presented for the entire industry and noted the need for constant vigilance on safety issues.
- **Civil Aviation Authority Captains of Industry Forum.** With the Director Civil Aviation as Chairperson, the Captains of Industry Forum met a number of times this past year. Airline CEO's joined the SACAA, ACSA, ATNS, SAWS, the Association of Airports and Aerodromes Southern Africa (AAA-SA), AASA, [Board of Airline Representatives of South Africa \(BARSA\)](#), the [Commercial Aviation Association of Southern Africa \(CAASA\)](#) and the [Aero Club of South Africa](#) in discussions. This provides the forum for CEO's and senior executives of industry to engage on strategic issues and major areas of concern for the industry. This included debates on the proposed amendments to the aviation Directions and other developments for COVID-19, obtaining updates on the aviation policy review process, the financial position of the SACAA, and many of the other items covered in the ILF noted above. The June 2021 meeting included an engagement with the Director General of Transport. AASA continued to play a leadership role in this forum on behalf of the airline industry.
- **Civil Aviation Authority Flight Operations Forum with Airlines.** Flight Operations meetings between airline operational personnel, SACAA officials and AASA were held on specific matters of importance to the industry. These included the Directive which affords exemption to Industry on Class 11 and Class 111 Components or Parts until 26 February 2022. Representations and discussions are ongoing with the SACAA to find an acceptable solution.
- **Environment.** The SACAA has the responsibility of monitoring and managing the process of reporting emissions by airlines.

3.5 Aviation Jet Fuel Forum

3.5.1 Transnet Pipeline Tariff Application

For the year commencing 1 April 2021, Transnet applied for a 2.3% increase in regulated pipeline tariffs to become effective on 1 April 2021. This was supported by AASA and IATA on behalf of the industry. The next application by Transnet Pipelines is expected to be published for comment and consideration by all stakeholders during September 2021.

3.5.2 Fuel Industry Meetings

No further Fuel Industry meetings have taken place during the year under review. However, it is anticipated that, considering the discussions with Transnet and the current state of the aviation industry, a fuel forum meeting is necessary and will be requested through ACSA that has convened such meetings in the past. Outstanding issues include the following:

- The **Port Elizabeth harbour storage facility** and feed to Port Elizabeth Airport.
- **Cape Town International Airport:** the construction of new tanks is under way and the feasibility of a new pipeline to supply jet fuel from the harbour storage/refinery to Cape Town International Airport is being discussed.
- **Interior Supply certainty:** discussions with Transnet regarding the long-term supply of jet fuel to the Gauteng region by pipeline and rail. Discussions with the oil industry and the future of refinery capacity supplying jet fuel to the Gauteng region from the Durban ENREF and SAPREF, and Cape Town refinery requires further discussion and clarification.

AASA continues to monitor fuel stock levels and work closely with all parties to ensure the security of supply to all airports. During the course of this year, and particularly following the COVID-19 lockdown, with the exception of a brief stock alarm issue at OR Tambo International Airport, stock levels were not an issue.

3.6 Environment Challenges

3.6.1 Global Initiatives

- **Net-Zero Carbon Emissions by 2050.**
- At the International Air Transport Association's (IATA) 77th Annual General Meeting, held on 4 October 2021, [a resolution for the global air transport industry to achieve net-zero carbon emissions by 2050 was approved](#). This commitment will align with the [Paris Agreement](#) goal for global warming not to exceed 1.5°C.
- **Carbon Offsetting and Reduction Scheme for International Aviation (CORSIA):** ICAO decides to change the [CORSIA](#) base year to 2019 instead of the average of 2019 and 2020, as a result of the extraordinary drop off in traffic in 2020 due to the COVID-19 pandemic.

3.6.2 South African Issues

- **Carbon Tax:** implementation and compliance by airlines to submit returns as directed.
- Application submitted for **the waiver of carbon tax for domestic aviation** to the Minister of Finance – to-date no response has been received. A further submission will be made by AASA on behalf of airlines in the near future.

3.6.3 United for Wildlife – Against Wildlife Trafficking

AASA continues to support the [United for Wildlife \(UfW\)](#) initiatives against illegal wildlife trafficking. In addition, AASA interacts with the [ROUTES partnership](#) and has distributed its material to Members. Dr. Ian Cruickshank, UfW's Transport Taskforce Manager for Southern Africa, assists AASA as its Environment and Wildlife consultant and is also the Chairperson of the AASA Environmental Committee. Dr. Cruickshank is currently establishing the Southern African Task Force against illegal wildlife trafficking.

The ROUTES and Beyond final partnership meeting was held on 13 October 2021. Training materials to assist airline staff in combatting illegal wildlife trade can be located [here](#) on the AASA website.

3.7 Human Resources, Labour Relations and Training

AASA's involvement in Human Resources, Labour Relations and Training initiatives include the following:

- **Management Committee of the Aerospace Chamber of the [Transport Education Training Authority \(TETA\)](#).** The AASA airline membership has been ably represented by the South African Airways (SAA) representative over the past year. The impact of COVID-19 has negatively affected most of the Chamber activities. There has been a decline in the awarding of Discretionary Grants as applications for them are relative to the low activity in the sector.
- **AASA Skills Development Training Programme.** Due to the COVID-19 lockdown restrictions and the challenging financial position the industry finds itself in, the AASA skills development training programme has been put on hold. This position will be reviewed depending on the pandemic status and recovery of the industry.
- **[Wonders of Aviation \(WOA\)](#). *Inspiring and Supporting Tomorrow's Aviation Leaders*.** Despite the pandemic, WOA continued its activities on a smaller scale. WOA is an NPO that relies on volunteers to achieve its objectives of educating and inspiring the youth from disadvantaged communities to consider careers in the aviation industry. WhatsApp groups were set up to share information and morale-boosting messages of hope and encouragement. The [Book Share Club](#) is gaining traction and becoming popular as more members join this initiative. The WOA team will continue to make strides in promoting its objective of advancing aviation to the disadvantaged youth resulting in many of them joining the industry.

3.8 Legal Matters

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

The South African legal team advising the industry and working with the support of the international [Aviation Working Group \(AWG\)](#) has progressed with further proposed amendments to the draft Amendment Bill and Regulations and submitted these proposals to the DOT. Further consultations are expected with government to commence the legislative process of incorporating the provisions into South African domestic legislation.

3.8.2 Consumer Protection Act, South Africa

AASA continues to escalate claims and complaints forwarded by the National Consumer Commission and the Consumer Goods and Services Ombud within airline management.

3.8.3 Civil Aviation Act

During the past year, further amendments were proposed by the DOT, the SACAA and thereafter consolidated into proposals by the Parliamentary Portfolio Committee on Transport. AASA made a presentation to the Portfolio Committee on the proposals that included the formalisation of the establishment of the independent Aviation Safety Investigation Board (ASIB) and the approval of the SACAA as a preferential creditor in respect of payment of passenger safety charges collected by the airlines on behalf of the SACAA. The Amendment Bill has been approved by Parliament and at the time of this report is before the National Council of Provinces for approval, whereafter it will be submitted to the President of South Africa for signature into law.

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

The review process to consolidate the Air Services Licensing Act 115, 1990 and the International Air Services Act 60, 1993 into a single Act, namely the Air Services Act, is still underway. Unfortunately, little progress was made during the past year, with the previous comments made by AASA in January 2020 still requiring attention.

The urgency of this matter has been highlighted since March 2021 by the significant delay in the appointment of a new International Air Services Council and Domestic Airline Services Licensing Council to attend to urgent air service licensing business. This delay has hindered the ability, in particular South African-based airlines, to expand their business to make use of opportunities beyond South Africa's borders as the airline industry gradually recovers following lockdowns and travel restrictions caused by the COVID-19 pandemic.

3.9 Department of Tourism, South Africa and Tourism Business

Mr. Chris Zweigenthal was a member of the Board of Directors of the [Tourism Business Council of South Africa \(TBCSA\)](#) until his departure from AASA at the end of August 2021. Ms. Wrenelle Stander was appointed a Director from that date. Through this forum, the South African airline industry views are well represented in travel and tourism forums. AASA continues to be active in supporting the [Department of Tourism](#) in the development of policy and strategy, and attends the National Tourism Stakeholder Forum. This involvement has continued through the COVID-19 pandemic, as consultation and integration of strategies and actions towards industry recovery has become essential.

3.10 Aviation Co-Ordination Services (ACS)

3.10.1 General

ACS is mandated by the airlines serving South Africa to provide certain common-use services at South African airports that could otherwise potentially have been provided, at great cost, by individual airlines themselves.

Mr. Zweigenthal and Ms. Stander were the AASA-appointed Directors of ACS, and Mr. Lochan was the Alternate Director during the past year. Following Mr. Zweigenthal's retirement, Ms. Namhla Tshetu was appointed as a Director. These executives are involved in ACS activities through their roles on the respective ACS Board Committees and their appointment to the Board.

As reported in the 2019/20 Annual Report, ACSA gave ACS notice in July 2019 of its intention to insource the Hold Baggage Screening (HBS) process with effect from 1 August 2021. ACS, together with AASA and BARSA and the airlines, submitted a founding affidavit in the High Court on 12 June 2020 to challenge ACSA's action. On 25 June 2020, ACSA advised ACS that its Board had decided to rescind the decision to insource Hold Baggage Screening. Since that time, ACS has unsuccessfully attempted to get ACSA approval for ACS to undertake the critically required like-for-like replacement of HBS equipment which are nearing end of life at ACSA airports. ACSA has unfortunately not been forthcoming with this decision and this is not in the interest of the aviation industry. It is critical for this matter to be resolved in the interest of aviation safety and security.

3.10.2 Hold Baggage Screening (HBS)

ACS continues to provide 100% HBS at all ACSA airports, as well as four non-ACSA airports, namely: Hoedspruit, Margate, Plettenberg Bay and Richards Bay.

The delay in obtaining a decision from ACSA to enable ACS to proceed with the like-for-like replacement of HBS equipment is concerning. It is essential for new technology HBS equipment to be deployed at airports where ACS provides services, to ensure services benchmarked against international best practice can be assured.

3.10.3 Baggage Reconciliation Services (BRS)

ACS provides the BRS at OR Tambo, Cape Town, Durban, Port Elizabeth, Bloemfontein, East London, George and Kimberley airports. SITA is the service provider for BRS.

Following the onset of the COVID-19 pandemic, ACS delayed the project to implement [IATA Resolution 753](#), which ensures all baggage is reconciled at the arrival destination. However, this project will recommence during 2021/2022 as the industry recovers post-COVID-19.

3.10.4 Common Use Terminal Equipment (CUTE) and the Common Use Self Service (CUSS)

ACS is responsible for the management, operation and maintenance of the CUTE and CUSS kiosks at all ACSA airports, as mandated by the airlines operating to all ACSA airports. It is essential that an upgrade of the self-service/Fast Travel operation takes place, including the replacement of the CUTE and CUSS equipment by ACSA as necessary, and the implementation of new digital, touchless technology to take account of the post COVID-19 passenger requirements. The existing equipment reaches end-of-life at the end of 2021, but ACSA is linking its decision to replace this equipment with its decision on the HBS operation.

3.10.5 Cargo Screening

ACS continues to perform cargo screening at OR Tambo and Cape Town International airports, and is in a position to offer this service to the wider community as necessary.

3.10.6 ACS VAT Invoices

ACS does not issue VAT invoices to airlines for the collection of the ACS (UM) charge. A submission was lodged with SARS on 5 August 2021 requesting a ruling to address VAT and income tax. The income tax issue with regards breakage and the timing of the recognition of revenue has been resolved. An outcome is being awaited on the VAT issue.

3.11 AASA Standing Committees

AASA has established Standing Committees, comprising AASA, industry 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 Safair, meets quarterly and deals with flight and ground safety issues. The 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. Feedback on specific safety issues is provided at the AASA quarterly business meetings.
- **Environmental Committee.** This Committee is chaired by Dr. Ian Cruickshank, AASA Environmental and Wildlife Specialist. The Committee encourages environmental sustainability to enhance the sustainability of airlines.
- **Flight Operations Committee.** This Committee has not met formally during the COVID-19 lockdown. However, this meeting will be called to focus on ongoing operational issues with the involvement of SACAA and airline industry officials. Where necessary, working groups will be established.

AASA wishes to thank all Chairpersons and the Secretariat of these Committees, together with the expert representatives who are members of these Committees, for their enthusiastic participation and commitment to furthering the collective interests of the industry.

3.12 50th Annual General Assembly

AASA's 50th Annual General Assembly was held on 8 October 2020 as an online event on the ZOOM platform. Unfortunately, due to COVID-19 and international travel restrictions, it was not possible to hold an in-person event. A total of 175 delegates joined the online event.

4. Other Industry Involvement



4.1 IATA and Regional Airline Associations

AASA is the SADC-based regional airline association, and works closely with IATA to ensure the implementation of its global mandate throughout the region. Due to COVID-19, the IATA AGM was held as a virtual online event on 24 November 2020. AASA also acknowledges its close relationship with AFRAA.

During this year, AASA has worked closely with IATA and AFRAA to lobby organisations such as the African Union Commission and the African Development Bank, and governments within Africa for financial support and relief for airlines and the aviation industry in general, due to the devastating impact of COVID-19. These engagements are ongoing and while results of these initiatives have been slow to yield results, the work has highlighted the socio-economic benefits to and the importance of the aviation, travel and tourism industry on a nation's economic growth, development and well-being.

While there have been no formal engagements of regional associations during this past year, these associations have remained informed on each other's activities through online communication.

4.2 South African Industry Association Involvement

AASA recognises and appreciates the close working relationship with several industry organisations in South Africa, including BARSAA, where there is also a shared interest in the business of ACS. We recognise and appreciate the close working relationship we enjoyed with the CEO, Ms. Zuks Ramasia.

We also recognise the close working relationship with the Aero Club of South Africa, and the CAASA, their Executives and teams. Mr. Zweigenthal was an Alternate Director on the Board of CAASA, but resigned following his decision to retire from AASA.

Mr. Zweigenthal was a Director on the Board of the TBCSA until his departure from AASA at the end of August 2021. AASA acknowledges the important relationships with the TBCSA, the South African umbrella association for the travel and tourism industry, and its member associations and companies. It is within these forums that AASA promotes the airline industry's interests, and has supported the initiatives to restart aviation, travel and tourism following the COVID-19 pandemic.

5. Media and Conference



During the year under review, AASA has attended several conferences as speakers and/or participants, and engaged at length with the media. Since the declaration of the COVID-19 pandemic, conference participation has been on virtual online platforms, and media interaction has been on these platforms, as well as via radio, telephone or electronic media. AASA appreciates the importance of media in conveying AASA's position and message on industry issues, and values the relationship and interaction opportunities, and has participated as follows during the year under review:

Date	Description
1 July 2020	Global Business Travel Association (GBTA SA) Conversation that Counts: Chris Zweigenthal discussed the impact of COVID-19 on aviation .
23 July 2020	Africa Tomorrow (AVIADEV) panel discussion: Chris Zweigenthal, joined other industry leaders including: Abderahmane Berthe (Secretary General, AFRAA); Sanjeev Gadhia (Vice Chairman, TIACA); and Raphael Kuuchi (Special Envoy to Africa on Aero-Political Affairs, IATA) to discuss the challenges facing the African aviation industry due to the COVID-19 pandemic .
13 August 2020	Travel News Weekly (TNW) AASA CEO article: Chris Zweigenthal wrote an article titled: Airline hubs in the post-COVID-19 world .
24 August 2020	Newzroom Afrika interview: Chris Zweigenthal on business past COVID-19 restrictions .
8 September 2020	Just Africa Aviation interview: Chris Zweigenthal featured in the JAA interview series: Collaboration; Strength in Numbers.
11 September 2020	Voice of America: Chris Zweigenthal participated in a television story on the state of aviation in Africa - challenges and pressures .
16 September 2020	Radio interview with 702: Chris Zweigenthal about industry's call for the President to open up international travel in order to save jobs in the aviation and tourism sector .
16 September 2020	Radio interview with Voice of the Cape: Chris Zweigenthal on <i>the impact of COVID-19 on the industry and the necessity for a restart</i> .
17 September 2020	INSOL Virtual Conference (INSOL International): Chris Zweigenthal participated in a panel discussion: Shelter in Place? The effects of lockdown and beyond on the travel and tourism industry .
23 September 2020	[WEBCAST] Rebuilding the industry: Chris Zweigenthal was interviewed about obstacles that the travel industry will still need to overcome to rebuild itself following the announcement that South Africa's borders will reopen on October 1 .
12 November 2020	[INTERVIEW] AASA CEO welcomes South Africa's relaxation of international travel restrictions: Chris Zweigenthal provided a media statement to @SATravelReady and welcomed the full reopening of South African borders to international visitors.
17 November 2020	[INTERVIEW: Air Transport World] Chris Zweigenthal, AASA CEO. Victoria Moores for Air Transport World published by Aviation Week Network. Mr. Zweigenthal <i>spoke about how better testing can eliminate mandatory and universal quarantines that kill passenger demand</i> .
30 November 2020	[INTERVIEW] Is the airline industry ready for the festive season? Nompu Siziba of MoneyWeb, SAfm interviews Chris Zweigenthal about developments and new players in the local aviation industry, and how South Africa's tourism demand is looking for the festive season.
13 December 2020	Travel News: AASA Outlook for 2021 published.

Date	Description
27 January 2021	United for Wildlife presentation: Southern African Task Force progress on sharing the successes of combating international wildlife trade within the region and identifying priorities.
4 February 2021	[INTERVIEW] CGTN TV on the impact of the travel ban due to COVID-19.
1 - 2 March 2021	Virtual Summit Review of Civil Aviation Policy for South Africa. AASA and South African Airline Members participated in the National Civil Aviation Policy Review for South Africa.
3 March 2021	AAIG Webinar. AASA attended this webinar titled Achieving Affordable Air Transport Across Africa. Chris Zweigenthal convened the wrap up and presented the communique.
25 March 2021	AFCAC Capacity Building Workshop. AASA presentation on challenges facing industry through COVID-19.
27 March 2021	Sunday Times. COVID-19 industry impact update.
31 March 2021	Hermes Air Transport Organization. Submission of an AASA article for publication titled Resilience and efficiency through Leadership and Cooperation . Published 9 September 2021.
8 April 2021	SACAA National Aviation Conference. AASA participated in a panel discussion on the State of Industry with industry leaders from IATA, ACSA, ATNS, CAASA and BARSA.
21 April 2021	Sunday Times. Update on airline industry developments.
26 April 2021	KZN Mercury. COVID-19 industry update.
28 April 2021	African Union. AU Commissioner meeting with IATA, AFRAA and AASA regarding aviation priorities arising from the pandemic.
29 April 2021	[AASA Press Release] AASA urges governments to speed up vaccinations and provide relief to air travel and tourism sector in order to secure economic recovery.
6 May 2021	BBC World Service radio interview. Update on the impact of the pandemic on Southern Africa.
10 May 2021	[INTERVIEW] CGTN TV on the impact of the pandemic on Southern Africa and Africa.
10 May 2021	Nomad Magazine. Comments on COVID-19 travel experiences.
12 May 2021	Travel News update. Industry developments in South Africa.
13 May 2021	Trade Interview. South African airlines update.
26 May 2021	[AASA Press Release] Chris Zweigenthal to retire as AASA CEO.
1 June 2021	Research Interview. AASA provided input into an investigation on the impact of COVID-19 on transport sector in Southern Africa.
3 June 2021	[INTERVIEW: Air Transport World] Victoria Moores interviewed outgoing CEO Chris Zweigenthal.
9 June 2021	AVIADEV Africa 2021/Ato Girma Lifetime Achievement Award. AviaDev is the premier route development event for the continent connecting airlines, airports, tourism authorities and suppliers together to improve Africa's connectivity. This year the event was held online. Chris Zweigenthal (the 2019 recipient) presented the 2021 Ato Girma Wake Lifetime Achievement Award to Adefunke Adeyemi, IATA's Regional Director, Advocacy and Strategic Relations, Africa.

Date	Description
1 July 2021	[AASA Press Release] Wrenelle Stander appointed as AASA CEO .
30 July 2021	SACAA Aviation Security Campaign launch. Wrenelle Stander shared a 'Message of Support from Airlines' at the #YOSC event .
August 2021	SA Flyer magazine. [INTERVIEW] Wrenelle Stander - New AASA CEO and [PROFILE] Woman in Aviation: Wrenelle Stander .
2 August 2021	Fin24.com article. Recovery of aviation in Africa will take time, says new industry body CEO .
3 August 2021	[INTERVIEW] The future of South Africa's aviation industry : eNCA interviewed Wrenelle Stander who addressed the question: <i>How long will it take for SA's aviation industry to get back on its feet and just how much damage has been done?</i>
8 August 2021	Sunday Times, Business Times article. Flying in a holding pattern as cash burns .
20 August 2021	[Aviation & Allied Business Journal - Valediction Interview] Chris Zweigenthal's final interview as AASA CEO Chris Zweigenthal hopes for 10% of global passenger marketshare in Africa in 10 years .
7 September 2021	[AASA News] AASA urges Transport Minister to establish the Air Services Council .
11 September 2021	Fin24.com article. SA airlines flying blind with no air services councils since March .
12 September 2021	City Press article. No councils, no supervision for SAA .
27 September 2021	[AASA Press Release] Aaron Munetsi appointed as AASA CEO .
15 October 2021	Fin24.com article. Opening up the skies the only way to save southern Africa's airlines - new industry body CEO, Aaron Munetsi .



6. Regional Issues



AASA has 17 Airline Members of which six are South African-based airlines and 11 are regional airlines based in Southern Africa and the Indian Ocean Islands. AASA has the mandate to deal with regional issues, including those which its Members bring to its attention. AASA has been involved with the following projects:

- **SADC Civil Aviation Committee business.** AASA is the only airline-based organisation that has a seat as a consultative member representing the airlines on the SADC Civil Aviation Committee – *refer to item 3.2.*
- **Environmental Issues.** South African and regional Airline Members are invited to attend AASA's Environmental Committee meetings. AASA will attend to all issues impacting its Members whether on global programmes such as CORSIA or regional/local programmes such as carbon taxes.
- **Cape Town Convention.** The work undertaken by AASA on this project could be used by regional Members requiring assistance in their State, working towards the goal of their inclusion on the Cape Town list.
- **User Charges.** During the course of the past year, AASA has worked with IATA in user consultations with the NCAA, and awaits a decision of the Namibian government on the aviation industry proposal to postpone increases in charges. Due to the negative impact of COVID-19 on the airlines' financial position, AASA also made submissions to other governments of its Airline Members' States to request them to consider not implementing increases in user charges, reducing or waiving charges, introducing deferred payment plans, as well as considering tax relief. This was also part of the work done in conjunction with IATA and AFRAA as *noted in item 4.1.*



7. Conclusion



During the past year, the COVID-19 pandemic remained the dominant focal point of the aviation industry, both globally and within the Southern African region. It has been characterised by a series of changing lockdown directions, based on adapting risk-adjusted levels imposed by governments, as the levels of COVID-19 infections rose and fell in a succession of waves. This had a negative impact on the aviation, travel and tourism industries and recovery plans that fluctuated between positive and negative responses as the lockdown levels changed. Ultimately, industry was not able to achieve a sustainable recovery which it so desperately needs. With the roll-out of the vaccination programmes in South Africa and the SADC region, it is hoped the COVID-19 infection rates will drop and remain within reasonable and acceptable levels, thereby enabling travel restrictions to end and for the travel and tourism sector to recover. Notwithstanding, it is expected that constant vigilance and discipline, in line with laid down protocols, will have to be maintained in the year ahead.

On behalf of the AASA Team, I would like to acknowledge the leadership and guidance of the Board of Directors and the Executive Committee of AASA who have provided support to the AASA Team during the past year. In particular, I thank the Chairperson, Mr. Elmar Conradie, the Deputy Chairperson, Ms. Agnes Khunwana, Mr. Rodger Foster, Mr. Miles van der Molen, Mr. João Jorge, Mr. William Ndlovu and Mr. Vivendra Lochan, for their guidance, wise counsel and assistance during these challenging times.

I record my sincere appreciation to our Airline and Associate Members, including those who have served on many Standing Committees and industry forums, for their support throughout this difficult year, and for challenging the AASA Team to deal with new issues affecting the industry as a whole. We are acutely aware of the dire situation in which many of our Members find themselves as a result of the COVID-19 pandemic, and we wish each and every Member well during this rough road to recovery.

To all members of government, public and private stakeholders, industry service providers and partners, we appreciate the extensive pressure under which everyone has operated during 2021, and thank everyone for the opportunities to engage and cooperate on normal agenda items, as well as the COVID-19 developments.

And finally, to the AASA Team: Mr. Vivendra Lochan, Chief Operating Officer; Ms. Celeste Breedts, our PA and Secretary; Ms. Alice Saule, our Office Assistant; Mr. Charles Simelane, our Finance Controller; and Ms. Tatum Kok, our Aviation Analyst, I extend my sincere thanks and appreciation for their commitment, loyalty and attention to their responsibilities, and the needs of our valued Members.



Mr Aaron Munetsi
AASA, Chief Executive Officer

25 October 2021



I Appendices



Appendix A List of Members (as at 30 September 2021)

Associate Members

A

Air BP
Airbus
Air Cargo Operators Committee (ACOC)
Airports Company South Africa (ACSA)
Air Traffic Navigational Services (ATNS)
Amadeus
Association of South African Travel Agents (ASATA)

B

BidAir Services
Blake Emergency Services
Boeing

C

Cape Town Air Access
CFM International
CoCre8 Technology Solutions (formerly Fujitsu)

D

De Havilland Aircraft of Canada Limited

E

Embraer
Engen

F

FlightSafety International

G

GE Aviation

H

Hahn Air
Huawei

I

Investec

K

Kruger Mpumalanga International Airport

L

Lanseria International Airport
Lufthansa Technik

M

MHI RJ Aviation

P

Pratt & Whitney
Puma Energy

R

Rolls-Royce PLC
Royal Eswatini National Airways Corporation (RENAC)

S

Sabre
Shell Aviation
SITA
South African Tourism
South African Weather Service
Swissport

Airline Members

A

Air Austral
Air Botswana
Airlink
Air Namibia
Air Zimbabwe

C

Cobra Aviation Group/FlyCobra
Congo Airways

E

Eswatini Airlink

F

Federal Airlines

L

LAM Mozambique Airlines

M

Mango Airlines
Mozambique Express

P

Proflight Zambia

S

Safair
South African Airways
South African Express

T

TAAG Angola Airlines

Airlines Association of Southern Africa NPC (AASA)

2020/21 Annual Report

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