

AIRLINES ASSOCIATION OF SOUTHERN AFRICA



Annual Report

2021/22



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 **15** Airline Members. In addition, Associate Membership is open to airline partner organisations. There are currently **38** 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 a regular participant and contributor to the International Civil Aviation Organization (ICAO) and International Air Transport Association (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.

AASA Executive Team

Mr. Aaron Munetsi CEO

Mr. Elmar Conradie Chairperson / CEO, Safair

Ms. Agnes Khunwana Deputy Chairperson / CEO, Air Botswana

Mr. Vivendra Lochan COO

Mr. Rodger Foster Executive Committee / CEO, Airlink

Mr. João Jorge Executive Committee / General Director, Linhas Aéreas de Moçambique (LAM), SA

Mr. William Ndlovu Executive Committee / CEO, Mango Airlines



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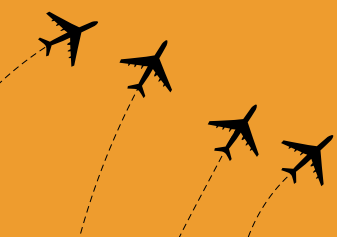
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Acronyms and Definitions

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 2021/2022 Annual Report detailing the activities and achievements during the year under review from 1 July 2021 to 30 June 2022. The work undertaken after the end of the financial year up to the 2022 Annual General Meeting, to be held on 15 October 2022, 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 stakeholders, as required.

The past year commenced, as any other year, with a busy and full agenda covering many areas of the airline business where AASA's leadership, participation and involvement was necessary. In this regard, AASA has led the promotion of initiatives and airline industry interests in Southern Africa and the Indian Ocean Island region on behalf of its members, and appreciates the excellent working relationships with all stakeholders. These include leaders of the aviation industry organisations, senior public and government officials, as well as statutory aviation organisations, on all matters impacting the overall sustainability of the airline industry in the Southern African and Indian Ocean Island region.

During the period of May 2021 to August 2021, the COVID -19 risk-adjusted levels in South Africa were amended, driven by the third wave of the COVID-19 virus, mainly in respect of the Delta variant. The changing risk-adjusted levels and impact of COVID-19 infections had an impact on traffic operating to and from South Africa.

Since the start of 2020, this pandemic has directed the narrative of every aspect of the world's activities, including the global, African and Southern African aviation industry. While AASA has continued to drive the normal agenda of activities, the impact of the COVID-19 pandemic has dominated business, as all aviation organisations had to manage the lockdowns, their survival, and the actions to re-start domestic, regional and international operations.

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:

- **Mr. Elmar Conradie** Chairperson
- **Ms. Agnes Khunwana** Deputy Chairperson
- **Mr. João Carlos Pó Jorge** Executive Director
- **Mr. Aaron Munetsi** Chief Executive Officer
- **Mr. Vivendra Lochan** Chief Operating Officer

Mr. Chris Zweigenthal resigned as a Director on 31 August 2021.

2.2 AASA Executive Committee

The AASA Executive Committee (EXCO) remains responsible for the oversight of the Association and refers the 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. Elmar Conradie** Chief Executive Officer, FlySafair
- **Mr. Rodger Foster** Chief Executive Officer, Airlink
- **Mr. João Jorge** Director General, LAM Mozambique Airlines (appointed 26 May 2020)
- **Mr. Aaron Munetsi** Chief Executive Officer (appointed 15 October 2021)
- **Mr. Vivendra Lochan** Chief Operating Officer
- **Ms. Wrenelle Stander** Chief Executive Officer (appointed 15 July 2022 and resigned 15 October 2021)
- **Mr. Chris Zweigenthal** Chief Executive Officer (resigned 31 August 2021)

2.3 AASA Team

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

- **Mr. Chris Zweigenthal** Chief Executive Officer (resigned 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 year under review, the following airline joined AASA as an Airline Member:

- Fly Cobra

During the year under review, the following airlines resigned as Airline Members of AASA:

- SA Express
- Air Namibia

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

- Hitit
- Astron Energy
- Cape Winelands Airport
- Aercap

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

- Huawei
- Sabre

The Association currently has **15 Airline Members** and **37 Associate Members**. AASA Members are listed as **Annexure A** on page 26 of this report.

2.5 Black Economic Empowerment Accreditation

AASA's accreditation status for the period under review was at Level 4.

2.6 Financial Matters

An Audit of the 2021/22 financial year has been completed by the external Auditors, Van Sitterts, and these Annual Financial Statements and the Audit Report will be presented at the Annual General Meeting on 15 October 2022 for ratification by AASA 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 Airports Company South Africa (ACSA) and Air Traffic and Navigation Services (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, though the advent of COVID-19 has delayed the finalisation of this legislation. Consultation on the drafting of regulations to underpin the amended legislation is still required.

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. Due to the COVID-19 pandemic and the uncertainty regarding traffic projections, the negative financial impact on ACSA and ATNS, which impacted both Capital and Operating expenditure plans, the Minister of Transport approved a joint industry recommendation to delay the commencement of the new Permission by one year to 1 April 2022. Given the uncertainty and existing financial challenges for all stakeholders, the Regulating Committee proposed a further delay to the commencement of the new Permission to 1 April 2023.

During this year, planning commenced for the next Permission for the period 1 April 2023/24 to 31 March 2027/28. A series of meetings were held between the Regulating Committee, industry, ACSA and ATNS to discuss the new Permission. The first consultation meetings between industry, ACSA and ATNS were held during March and April 2022, with the consultation sessions continuing until the final submission is made to the Regulating Committee by 30 September, which has now been extended to a date to be advised.

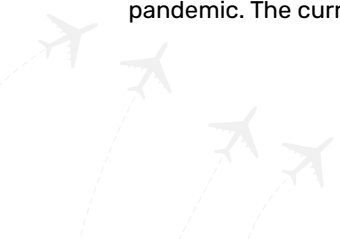
The financial impact on the industry has proved to be devastating, and together with the uncertainty over how long it would take for passenger levels to recover to pre-COVID-19 levels. Following the recommencement of air services, it became clear that each organisation would have to review its traffic forecasts, and CAPEX and OPEX plans for the forthcoming years.

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, in general, have been maintained, although changes to the risk-adjusted levels have impacted airport, air navigation services, airline operations and passengers, who were subjected to the many protocols and procedures during the pandemic travel experience.

3.1.3 Airports Company South Africa (ACSA)

a. Permission: 1 April 2018 to 31 March 2023

ACSA is continuing its implementation of CAPEX and OPEX containment measures necessitated by the COVID-19 pandemic. The current permission will be allowed to continue for the full 5 years.





The uncertainty of being able to satisfactorily produce traffic forecasts with the required accuracy has eroded the confidence in the recovery of the industry. This would influence the ability to plan a realistic CAPEX programme, other than essential maintenance CAPEX to provide the necessary service levels to the airlines.

The industry (AASA, IATA and BARSAs) had made representations to the Regulating Committee with regards to the K-factor adjustments, the outcome was favourable to the industry. The increase initially proposed by ACSA would have resulted in an overall increase in average tariffs of 38,6 % which was considered to be unaffordable and unsustainable. The proposed increase translates to an annual saving for all airlines of approximately R598 million in normal trading conditions.

The clawback for the 2018/19 - 2022/23 Permission period will be reviewed during the forthcoming Permission process. The tenure of the present Regulating Committee has been extended until the appointment of the new incoming Regulating Committee.

b. Permission: 2022/23 to 2027/28

Consultation meetings have been held between ACSA and the Industry in preparation for the new Permission which would commence on 1 April 2023 and continue until 2027/28. The expected date of submission was 30 September 2022, this has been extended to a date to be advised.

User consultation meetings on traffic forecast, CAPEX and OPEX requirements will be ongoing until the finalisation of the process.

3.1.4 Air Traffic and Navigation Services (ATNS)

a. Permission Process

ATNS has implemented its CAPEX and OPEX reprioritisation programme and is currently assessing further cost reduction measures. AASA has stressed to ATNS that it is essential to provide services to meet demand, particularly as airline operations improve and intensify in line with the decline in the severity of the COVID-19 impact on travel.

ATNS has requested the inclusion of Non-Regulated Assets as part of the current Permission. The Regulating Committee will make the final decision after consultation with Industry. The commencement date of the new Permission would be 1 April 2023 extended to 31 March 2028.

Outstanding in the new Permission process is the agreement on the traffic forecast which is critical for the determination of the CAPEX and OPEX spend, and ultimately the proposed Tariff.

Ongoing user consultations will be held until finalisation of the new Permission which is expected to extend beyond 30 September 2022.

b. Operations

ATNS Operational and Planning issues continue to be driven through the CNS/ATM Implementation Committee and the many working groups that continue to contribute to the efficient use of airspace.

ATNS held its Annual Operations Committee meeting (OPSCOM) on 25 July 2022, covering the following major issues:

- Permission CAPEX Project Status Report.
- Safety Performance.
- Industry Safety Workshop.
- CNS/ATM Implementation Committee Feedback.

- Flight and Flow of Information for Collaborative Environment.
- Future Navigation Strategy.
- Future Communication Strategy.
- Operational Strategy.
- Space Weather.

The CNS/ATM Implementation Committee continued to operate effectively throughout the year, supported by the work of six working groups. This work will feed into the Industry Financial Committee (FINCOM) and Permission consultations which commenced with industry in March 2022.

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 a lengthy consultation and review process, the SAWS tariff effective 1 April 2022 was only published in the Government Gazette on 20 April 2022. Industry through the consultations on tariff discussions effective 1 April 2022 maintained that a CPI increase will be acceptable. Industry was not successful in its representation; therefore, the gazetted tariffs will apply as follows:

- 1 April 2022 – 31 March 2023 = R62,25 (17,45% increase on current tariffs)
- 1 April 2023 – 31 March 2024 = R66,67
- 1 April 2024 – 31 March 2025 = R69,25

The RCMS recommended the above tariffs on a recoverable basis for SAWS to break-even and the “Under Recovery” and “Capital Allowance” was excluded.

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

During March 2020, AASA and IATA, joined by Airline Members who operate to Namibia, attended user charges consultations with the NCAA. There was also an opportunity to engage directly with the NAC on their charges. The NCAA proposed increases to its charges. In addition, industry proposed the change of the Passenger Safety Charge from a per available seat charge to a per occupied seat charge for inclusion on the airline ticket.

The NCAA published in the Namibian government gazette increases of 80% and 67% of the safety fee for domestic and international per occupied seat respectively on 13 September 2021. AASA together with IATA in a joint communication to the NCAA strongly opposed these massive increases. The issue has been escalated to Ministerial level. The NCAA has included the industry position in their submission to the Minister. We await a response from the NCAA.





3.2 African Aeropolitical Issues

3.2.1 SADC Civil Aviation Committee (CAC) Issues

The SADC CAC meeting was held on 30 and 31 May 2022. AASA participated via virtual platform. South Africa and Tanzania are close to signing the SADC Aviation Safety Organisation (SASO) Charter. The main projects on the agenda of this forum include the following:

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

It is anticipated there will be further motivation to implement SAATM to stimulate the recovery of African aviation following the impact of the COVID-19 pandemic. The African Civil Aviation Commission (AFCAC), IATA, AFRAA and AASA together with other industry organisations including ACI, CANSO, and aircraft manufacturers, Boeing, Airbus, Bombardier and Embraer, under the banner of the African Aviation Industry Group (AAIG), are working together to develop fair, equitable and practical solutions to the implementation of SAATM for the development of the African air transport market.

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

SASO is managed by an Interim Executive Director and team operating from its headquarters in Eswatini. The priorities are to resource and fund SASO, and to appoint a permanent team to enable it to perform the function for which it is being established, namely to improve safety oversight in States in the region requiring assistance.

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

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

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 Department of Transport has approved that the current Slot Compliance waiver remains in place for all airlines for the Northern Summer season commencing March 2023. This is in line with the practice being implemented in other parts of the world e.g., the EU, due to the uncertainty and constantly changing airline schedules necessitated by changing regulations and restrictions dictated by the COVID-19 pandemic.

Members are requested to release any slots that they are not using. Further, as in the previous slot period, it must be noted that slots allocated in the Northern Summer 2023 season will not count as historic slots for future slot allocations.

AASA is an active participant on these two Committees. However, since the end of March 2020, with the prohibition on scheduled air services, AASA submitted a request on behalf of industry, to suspend the implementation of slot rules. This was supported by the DOT and the Slot Coordinator and approval was granted to suspend slot rules until the industry returns to normality.

Airlines will not be penalised for the non-usage of slots during the period the slot rules are suspended. In order to assist in planning, airlines were requested to release slots they are not using. Airlines will obtain their original slots when requested. Slots allocated during the suspension of slot rules will not be considered as historic slots.

- **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 impact airlines.

- **ICAO Assembly**

Mr. Aaron Munetsi joined the South African delegation attending the 41st ICAO Assembly in Montreal held from 27 September to 7 October 2022. He participated in the Economic Commission (Regulation, Slots and Liberalisation) and the Executive Committee (Environment, Security and Facilitation). The AASA team participated in many preparatory meetings for the 41st ICAO Assembly and makes submissions where appropriate for meetings of AFCAC and ICAO.

- **National Facilitation Committee**

This Committee, convened under the Chairship of the DOT, met three times during the past year. The current focus of the Committee is the regulation and facilitation measures needed to be put in place relating to Public Health Measures at Ports of Entry. The establishment of Airport Facilitation Committees at International Airports and preparation plans for possible future pandemics is being given priority.

- **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 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 Charter Council by the Minister of Transport must still take place and they will be tasked with finalising the new Charter. AASA has nominated Mr. Aaron Munetsi to be part of the Transport B-BBEE Charter Council.

- **Cape Town Convention**

The DOT is the lead department in supporting the industry in its quest to develop amendments to the Convention on International Interests in Mobile Equipment (CIIME) Act of 2007, including regulations to enable South Africa to be placed on the OECD Cape Town list. *Refer to 3.9.1 below.*

- **Legislation and Regulations**

AASA is part of the team working with the DOT and airline representatives on the review of Civil Aviation legislation. The Civil Aviation Amendment Bill was approved by Parliament on 11 May 2021. The President signed the Civil Aviation Amendment Bill on 7 April 2022. Once the associated regulations have been developed and approved, the President through proclamation will gazette the commencement date of the Act.

With respect to the review of the South African Licencing Council Acts, the DOT has advised that it will communicate the timing for the finalisation of the draft Air Services Bill. AASA provided extensive comments to the DOT during January 2020. Further consultations between the DOT and industry are essential to address several important matters requiring discussion and resolution prior to the finalisation of the Amendment Bill.

- **Search and Rescue**

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 Coordinating Centre (ARCC). South Africa needs to demonstrate its search and rescue 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.

It has been recorded that the RSA does not possess any long range and Ultra Long-range capability. The Airforce has a C130 aircraft but this is dependent on availability. The long range and ultra-long range capabilities task team have identified service providers who have long range equipment, the DOT has been advised. The availability of funds is a challenge. A decision from DOT is pending.

In the interim, engagements are being held with surrounding rescue coordination centres to obtain assistance. The Multilateral agreements which the RSA has for the provision of Search and Rescue are also being scrutinised and updated so the country is aware of its obligations.

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. Areas of progress this year include the following:

- **Flight and Duty Regulations and Standards**

Following several consultations between the SACAA, ALPA-SA, AASA and domestic airlines, it was decided that the EASA Flight and Duty programme will form the basis of the amended regulations. It was further agreed that Rhodes University Sleep Science department would conduct research to assess the impact of fatigue on crew, determine problem areas and create a base around which the amended regulations would be drafted. The draft questionnaire was finalised and circulated around the time of the emergence of COVID-19. Due to the prohibition of air services, crew not involved in authorised operations were not required to report for work, and it was agreed the questionnaire would be recirculated once there is a return to some level of normality of airline operations to enable a critical number of crew to respond. This is still work in progress.

- Reciprocal inspection of States' civil aviation oversight capability for FOP's (international airlines) and / or approval to operate (local airlines). This includes the principle of approval and cost responsibility of airlines.

- Compliance issues and airline relationships with SACAA Inspectors.

- Process and lead times for license renewals, AOC and COA approvals.

- AASA is pleased to advise that after representations made to SACAA on behalf of its Members, a review of the directive regarding approval of foreign MROs for Class II and Class III components or parts was granted. This directive expired on 28 February 2022. SACAA has issued a formal communication stating the said directive will be extended until June 2024.

- **Regulations for Passengers with Disability**

As reported previously, proposed amendments submitted to CARCOM by AASA and ACSA were withdrawn, as a number of Stakeholders were unhappy with the proposals and the process followed. The DOT and SACAA will convene a further workgroup to recommence the process of drafting amendments to the current regulations and technical standards. No further progress to report on this matter.

- **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 (Square Kilometre Array) project. Due to uncertainty over applicability of KCAAA requirements to aviation and the lack of alignment of regulations, this project continues to cause great concern for AASA and the airline industry, and its concerns are shared by the DOT, SACAA, CAASA, the Aero Club of South Africa and BARSA.

Regulations were issued by the Department of Higher Education, Science and Technology to become applicable on 15 December 2019 restricting the use of certain frequencies including the aviation spectrum. However, the Department has confirmed that aviation is not subject to these regulations. The MOA was collectively concluded between the DOT and DSI, now up to DSI to set up Steering Committee (SC) meetings to deal with the technical challenges. The DOT will set up technical meetings as required. SACAA and ICASA were to assess the Aviation frequency allocation for correctness and potential frequency conflicts. The matter is being attended to by ICASA. The Minister of Higher Education, Science and Technology and the Minister of Environment, Forestry and Fisheries are to enable consultations to take place to reach a solution enabling both aviation and the KCAAA project to co-exist in a business-as-usual environment.

Further technical meetings are required to address these concerns. In the meantime, aviation can continue to operate as is without any constraints. This is work in progress.

- **Finance - SACAA Passenger Safety Charge, Fuel Levy and Fees**

Following consultations with industry, SACAA proposed a CPI increase for the next two years applicable from 1 April 2022. AASA and the industry supported a CPI increase for one year, due to consequences of the pandemic on air travel, and that the industry had not reached pre-pandemic performance levels. The Minister of Transport and Minister of Finance have not yet approved the proposed increase effective 1 April 2022. The current passenger safety charge of R 27,54 remains applicable.

- **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 SACAA against targets set by the DOT, activities with ICAO, incident statistics, and specific safety, security and industry-related matters.

- **Civil Aviation Authority Captains of Industry Forum**

With the Director Civil Aviation as Chairperson, the Captains of Industry Forum meets on a quarterly basis. The purpose of this forum is to update the Captains of Industry on matters of importance regarding the oversight role of the Regulator. Airline CEO's, SACAA, ACSA, ATNS, SAWS, the Association of Airports and Aerodromes Southern Africa (AAA-SA), AASA, BARSA, the Commercial Aviation Association of Southern Africa (CAASA) and the Aero Club of South Africa are all attendees at this Industry Forum.

- **Civil Aviation Authority Flight Operations Forum with Airlines**

Due to COVID-19, no further Flight Operations meetings between airline operational personnel and SACAA officials responsible for airline operations have been held. However, it is intended that with the return of full operations, AASA will initiate such meetings with SACAA again, dependent on the interests of Members.

- **Environment**

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

Industry held consultations with the National Energy Regulator of South Africa (NERSA) that resulted in a significant reduction of the increase in Transnet pipeline tariffs for 2022/23:

- Transnet had applied to NERSA for an increase of 83% in pipeline tariffs for FY2022/23.
- IATA, BARSa and AASA sought and were granted a meeting with NERSA on 3 February 2022, where we challenged the escalation in tariffs, promoted our idea of a process for tariff determination that is fairer to the aviation industry, and provided concrete recommendations to moderate the increase sought by Transnet. We followed up by sending the presentation and our formal submission to NERSA.
- On 24 February, the Regulator announced its decision on the Transnet pipeline tariffs. Many of the parameters that we had challenged were revised, including the massive increase in Allowable Revenue, the unfair and excessive amount of revenue clawback, and inclusion of assets that are not yet operational in the determination of tariffs.
- Consequently, NERSA allowed a much smaller increase in pipeline tariffs of 8%, or 4.19 cpl (1 cag) on the Durban to Alrode route, avoiding a significant increase in fuel cost for airlines flying to Johannesburg if Transnet's proposed increase of 43.42 cpl (11 cag) had been approved.
- Going forward, the Regulator has agreed to involve industry in a review of the tariff determination methodology, and the establishment of a global benchmark on pipeline tariffs.

3.5.2 Fuel Industry Meetings

After a lengthy absence, a Fuel Forum meeting was convened on 18 March 2022, and since then the meetings have resumed on a weekly or fortnightly basis to address concerns of low stock levels.

The devastating KZN floods further compounded the existing challenges of low stock levels, especially at ORTIA, due to the disruption of fuel supply by rail.

Presently major supply issues are being experienced at Cape Town International Airport due to the late arrival of fuel shipment because of inclement weather.

Industry role players have agreed that a long-term solution for the security of fuel supply at South African airports needs to be developed urgently to avoid a total stock-out. Airlines carried the industry by incurring additional costs by tankering and trucking in fuel supplies for their operations. Notwithstanding the aforementioned, 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.
- **Restarting operations at the refinery** in Cape Town.
- **Interior Supply certainty:** discussions with Transnet regarding the long-term supply of jet fuel to the Gauteng region by pipeline and rail.

During the course of this year stock levels have been erratic. AASA continues to monitor fuel stock levels and work closely with all parties to ensure the security of supply to all airports.

3.6 Department of Home Affairs, South Africa

As tourism is an essential component of driving the economy and the creation of jobs, a focus of the Department of Home Affairs is the expansion of biometric systems, e-visas, and e-passports.

AASA has advocated for a visa regime of visitor visas to be issued on arrival for bona-fide tourists and business travellers, for a set duration of days, provided certain conditions and criteria are in place to prevent an influx of unwanted visitors. Blockages in the visa system have been brought to the attention of the relevant Ministers.

3.7 Environment Challenges

3.7.1 Global Initiatives

The 41st ICAO Assembly was held from 27 September to 7 October 2022 in Montreal, comprising the 194 Member States of ICAO that approved the historic Carbon Offsetting and Reduction Scheme for International Aviation (CORSIA) as the international market-based measures according to which aviation will meet the challenges of climate change. This compliments the other measures being implemented by airlines and other aviation colleagues to reduce carbon emissions. A total of 88 States have volunteered for the pilot and first phases of CORSIA, effective 1 January 2021, including 17 African States consisting of six in the SADC region: Botswana, Namibia, Zambia, Democratic Republic of Congo, Madagascar and Tanzania.

The COVID-19 pandemic has created serious challenges for the implementation of CORSIA. In preparation for the pilot phase, that commenced in 2021, the global emissions for 2019 and 2020 were to be used as a base going forward. However, due to the prohibition on scheduled air services globally, which led to an approximate 60% reduction in flights during 2020, the base line would be severely distorted if 2020 emissions were included in the calculation. Following concerns shared by the airline industry and many States, ICAO considered a number of options to deal with the situation. In July 2020, the ICAO Council agreed to not include the emissions from 2020 and only use 2019 as the base for the pilot phase from 2021. AASA supported IATA in putting this position forward to ICAO as the fairest solution. It was also agreed the CORSIA framework would be reviewed in 2022 for consideration at the 2022 ICAO Assembly.

3.7.2 South African Issues

On 1 June 2019, the Carbon Tax Act was introduced into law in South Africa. This Act applies to domestic aviation and all sectors of the South African domestic economy. The first year's assessment of Carbon Tax was due at the end of July 2020. However, due to COVID-19, the Minister of Finance delayed the requirement to submit carbon tax assessments until 31 October 2020.

AASA has written to the Minister of Finance to request a postponement of the implementation of the Carbon Tax for a period of one year. No official response has yet been received. However, in an online carbon tax webinar, SARS advised that this would not be approved. AASA has approached the Minister of Finance and the SARS team with a further request to postpone the implementation of the Carbon Tax for domestic aviation to 1 October 2021.

The government has extended the first phase of the Carbon Tax by three years to 31 December 2025 to support business in their clean transition endeavours.

The Carbon Tax rate increased from an initial R134/T of CO₂e to R144/T of CO₂e in January 2022. Emissions reports for all qualifying airlines were due at SACAA by 30 April 2022 for the 2021 year and these must be verified reports. South Africa is still set to participate in offsetting from 2027.



3.7.3 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.

In May 2020, the AASA Executive Committee approved the appointment of Dr. Ian Cruickshank as its Environment and Wildlife consultant. He is the Ufw's Transport Taskforce Manager for Southern Africa and they have approved him working with AASA on its Environmental and Wildlife initiatives in the Southern African region. This is kindly provided to AASA at no additional cost.

The AASA team looks forward to continuing to work with Dr. Cruickshank, and is committed to making a difference in critical wildlife and environmental initiatives.

AASA's Environmental Committee, chaired by Dr. Cruickshank, holds quarterly meetings, and is the lead Airline Association committee on the continent with regards to environmental matters.

AASA is eager to contribute towards the training and development of its Members to enhance their progress in attaining sustainability in the region.

3.8 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 South African Airways over the past year. However, the AASA representative has since retired. The Aerospace Chamber has yet to advise regarding a replacement candidate to serve on the committee. AASA will nominate an Airline representative to serve on the management committee of the Aerospace Chamber of TETA after requesting suggestions from its Airline Members.
- **AASA Skills Development Training Programme.** AASA arranges training programmes for the benefit of its Members' employees, and to promote transformation in South Africa. To-date a total of 1809 employees from its Airline membership received training in various disciplines. However, due to COVID-19 and lockdown regulations, this programme was put on hold, due to an inability to hold these courses in-person, and to achieve cost savings for AASA.

AASA has re-assessed the Programme for the 2022/2023 financial year, and funds have been allocated to recommence the Programme. IATA has agreed to partner with AASA in providing Environment and Sustainability training, with IATA providing support of up to 90% of the costs. We will make the announcements soon when we call for nominations from Members.

Members are reminded to advise AASA of their training needs to determine the courses required, as well as identify critical areas where skills are lacking.

- **[Wonders of Aviation \(WOA\)](#). *Inspiring and Supporting Tomorrow's Aviation Leaders*.** The COVID-19 crisis and restrictions on meetings and travel curtailed some of the planned activities of the WoA youth outreach programme, which AASA has supported since its inception.

WoA is a non-profit organisation that sets out to educate and inspire youngsters from disadvantaged communities to consider futures in the aviation industry. WoA set up WhatsApp chat groups and virtual meetings with its South African members. The Book Share Programme participants continue to meet on a monthly basis. These forums are used to share Aviation-related information and morale-boosting messages of hope and encouragement.

The WoA team, a group of enthusiastic volunteers led by Don Proctor Schenk based in the USA, 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.

3.9 Legal Matters

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

Due to the COVID-19 pandemic and the focus of the industry on survival and a restart, no progress has been made on this matter which remains a priority to resolve. However, in view of the current environment with challenges to the survival of the airline industry, and several airlines either in business rescue or subject to liquidation proceedings, it is important to assess how the applicability of the Cape Town Convention, or lack thereof, would impact the airlines of Southern Africa.

Different views have been expressed, and it will be important to consult with AWG and our attorneys on this matter during the course of the next year. A draft amendment Bill and draft regulations have been prepared.

The South African legal team advising the industry and working with the support of the international Airline Working Group (AWG) have proposed further edits to the draft amendment Bill and Regulations and submitted these proposals to the DOT. Further consultations are expected with government, and to commence the legislative process to incorporate the provisions into South African domestic legislation.

3.9.2 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, and once again the attention to successfully resolving these matters by the airlines is appreciated. Due to COVID-19, the major areas of concern have been the treatment of cancellations of flights, and the issuing of vouchers instead of refunds. This has been necessitated due to the liquidity crisis of the airlines.

AASA has joined IATA and BARSAA in recommending that vouchers be accepted, while ensuring the provisions of State legislation is complied with. AASA appreciates the understanding of many passengers in accepting vouchers for future travel. However, it is pleasing to note that consumer complaints have decreased substantially over the past year.

3.9.3 Civil Aviation Act

The passage of the Amendment Bill through Parliament was delayed due to COVID-19. In the interim, the Department of Transport made further submissions to the Portfolio Committee on Transport to amend certain of the current proposals in the Amendment Bill. These related to the independence of the Air Safety Investigation Board, the creation of a trust account for SACAA to ring-fence the charges collected by the airlines from passengers due to SACAA, and the treatment of onboard recordings. AASA has requested further consultations be held regarding these issues prior to the Amendment Bill going before Parliament for final approval. AASA is awaiting a response from the Portfolio Committee on Transport. CAASA has also registered its concerns and requested consultations.

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 which included the formalisation of the establishment of the independent Aviation Safety Investigation Board (ASIB) and the approval of 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 was approved by Parliament on 11 May 2021. The President signed the Civil Aviation Amendment Bill on 7 April 2022. Once the associated regulations have been developed, the President through proclamation will gazette the commencement date of the Act.

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

AASA has continued to participate in the review process of the Air Services Licensing Act 115, 1990 and the International Air Services Act 60, 1993 with the intention to combine both Acts into a single Act, namely the Air Services Act. The latest draft was published for final comment. AASA submitted extensive comments on the latest draft in December 2019, with a further submission permitted by 20 January 2020. There are a number of important issues that need to be addressed and further consultations with industry are required. This is work in progress.

3.10 Department of Tourism, South Africa and Tourism Business

Mr. Aaron Munetsi 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.

Travel and tourism have, together with aviation, been severely impacted by COVID-19, with almost all travel and tourism organisations being prohibited from engaging in business, except where permitted for business and essential services, and domestic leisure purposes effective 18 August 2020. The survival of this industry is at risk. AASA had worked with and supported the TBCSA, South African Tourism and the Department of Tourism with initiatives to re-open tourism domestically, and to further motivate the reopening of borders for regional and international travel. In May 2022, South African Travel and Health protocols were lifted.

3.11 Aviation Co-Ordination Services (ACS)

3.11.1 General

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

Following the resignation of Mr. Zweigenthal and Ms. Stander from AASA, Mr. Munetsi, and Ms. Tshetu (Airlink) are the AASA-appointed Directors of ACS, and Mr. Lochan is an Alternate Director. These executives are involved in ACS activities through their roles on the respective ACS Board Committees and their appointment to the Board.

In July 2019, ACSA gave ACS notice through AASA and BARSa that ACSA wished to insource the Hold Baggage Screening process with effect from 1 August 2021. ACS, together with AASA and BARSa and the airlines, did not support this action, and following unsuccessful attempts to resolve this through consultation, ACS 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. ACS withdrew the application on 9 July 2020.

An update on this matter follows:

- Legal proceedings were launched in the High Court (Gauteng Local Division, Johannesburg) on 14 June 2022 under case number 22/20741 by Aviation Co-ordination Services (Pty) Ltd (ACS), Airlines Association of Southern Africa (AASA) and the Board of Airline Representatives of South Africa (BARSa).
- The legal proceedings challenge certain decisions taken by Airports Company South Africa SOC Limited (ACSA) in relation to the provision of hold baggage screening (HBS) services at its airports.

3.11.2 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 approval for ACS to proceed with the like-for-like replacement of the HBS equipment is still outstanding. Downtime is being experienced with old equipment and the availability of spares is becoming a challenge. It is critical to replace aging equipment and is an increasingly difficult risk to manage. Hence the legal proceedings as noted above.

3.11.3 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.

At the onset of COVID-19, ACS had commenced the project to implement [IATA Resolution 753](#), requiring all baggage to be reconciled at the arrival destination. Due to a requirement to affect cost savings, this project had been postponed. It has been decided to recommence the project in the next six months.

3.11.4 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. In respect of CUSS, prior to COVID-19, a total of 18 international airlines and six South African-based airlines offered services on CUSS. Discussions are currently underway for the replacement of the CUTE and CUSS equipment by ACSA, which becomes due at the end of 2021, with ACS continuing to manage, operate and maintain the system.

3.11.5 Fast Travel

AASA supports ACS and ACSA with the implementation of the IATA Fast Travel initiatives which will improve self-service processes, and introduce efficiencies into the passenger handling experience at airports. The current status of the initiatives includes the following:

- **Check-in:** implemented through the CUSS project.
- **Document check:** the facility is available for use by passengers when activated by the airlines.
- **Re-booking:** the facility is available for use by passengers when activated by the airlines. Web kiosks have also been installed at all ACSA airports to broaden the facilities available to passengers for their convenience.
- **Common bag drop:** it was intended that ACSA would implement this project as part of its CAPEX programme. At this stage, due to the review of the ACSA CAPEX programme, it is unclear whether this project will proceed.
- **Self-boarding:** this project is on hold as noted above for Common Bag drop.
- **Baggage re-claim:** this initiative has not attracted the support of the airlines nor their passengers, and it is planned to convert these kiosks into web kiosks.

3.11.6 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.



3.12 Treasury and SARS Business, South Africa

ACS VAT Invoices

SARS issued a binding private ruling to ACS on 4 November 2021, in which it was confirmed that the relationship between ACS and the airlines is one of principal/principal. SARS also confirmed that ACS should account for VAT only in respect of those passengers who have embarked on a journey as provided for in the Mandate Agreements, and that ACS is accordingly required to issue valid tax invoices to the airlines in respect of the ACS charge payable by them to ACS in terms of those agreements.

This issue was discussed with the airlines on 10 December 2021 where it was acknowledged that the SARS ruling and ACS' need to issue valid tax invoices going forward was problematic for the airlines in the short-term. It was agreed at the meeting that SARS should be approached to agree to implement the new approach with effect from 1 April 2022. SARS declined to agree to such an approach. In response, it was agreed that the airline industry, associations, or individual airlines would approach SARS for whatever dispensation that was necessary. ACS then advised the airlines that it will commence issuing valid invoices as mandated by SARS in its ruling to ACS as of 1 May 2022 for April 2022 billing.

3.13 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.
- **Human Resource Training:** No face-to-face meetings were held during the year under review. However, the AASA representatives on the TETA Aerospace Chamber Committee provided feedback to Members at AASA's quarterly business meetings.
- **Environmental Committee:** This Committee has been established to create awareness and provide information on the latest developments on climate change initiatives. The Committee meets on a quarterly basis. Under the leadership of our Environment and Wildlife Consultant, Dr. Ian Cruickshank, this Committee's focus is on Carbon Tax issues (for domestic aviation), reporting of emissions for both Carbon Tax and CORSIA (for international flights), and Wildlife initiatives in respect of countering illegal wildlife trafficking.
- **Flight Operations Committee:** This Committee has not met during the reporting period. However, with the resumption of normal flights, this meeting will be called to address ongoing operational issues, with the involvement of SACAA and airline industry officials. Where necessary, working groups may 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.

3.14 52nd Annual General Assembly (AGA)

AASA's 52nd AGA is the first in-person conference to be held after an absence of two years due to the COVID-19 pandemic. The 2020 and 2021 AGAs were held on the Zoom virtual platform.

The theme for this year's AGA is ***My African Dream***. We are expecting a total of 250 guests from around the world to attend. We sincerely thank and extend our gratitude to our Conference Host, Airlink, and the various Event Partners who have made it possible to hold our event this year.

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. AASA was represented at the IATA AGM held in Doha Qatar from the 19 to 21 June 2022.

In addition, we recognise the close relationship with our affiliated association on the African continent, namely, the African Airlines Association (AFRAA). We appreciate the close relationship and interaction we have, as well as the many invitations we have received over the past year to join the AFRAA-arranged webinars of interest.

A meeting of regional associations was planned for 2020, but this did not take place due to the COVID-19 pandemic. Notwithstanding, there has been some communication between the associations, and the relationship and contact with all regional airline associations is greatly appreciated.

4.2 South African Industry Association Involvement

AASA recognises and appreciates the close working relationship with several industry organisations in 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.

We recognise and appreciate the close working relationship with BARSA. We work with them on many projects and initiatives impacting the industry. We welcome Mr. George Mothema, BARSA's new Chief Executive Officer, and look forward to working with him and his team.

We also recognise and appreciate the close working relationship with the Aero Club of South Africa and the Commercial Aviation Association of Southern Africa (CAASA), and value working with the Executives and their teams.

Mr. Aaron Munetsi is a Director on the Board of the Tourism Business Council of South Africa (TBCSA). AASA respectfully acknowledges the important relationship with the TBCSA, the umbrella association for the South African Travel and Tourism industry, as well as 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 devastation of these industries due to the COVID-19 pandemic.



5. Media & Conferences



During the past year, AASA has attended several conferences as speakers and/or participants, and engaged at length with the media. Since the lifting of travel restrictions in South Africa in May 2022, AASA has participated in many in-person conferences together with conference participation 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. AASA has participated as follows during the year under review:

- **2 October 2022. [ARTICLE: Sunday Times]** [SA braces for airline seat shortages over festive season.](#)
- **30 September 2022. [ARTICLE: Airspace Africa]** [AASA warns of Disruptions and Cancellations Amid Jet fuel crisis at Cape Town airport.](#)
- **28 September 2022. [ARTICLE: Engineering News]** [AASA begs govt to waive airport fees as jet fuel rations at Cape Town squeezes airlines.](#)
- **28 September 2022. [RADIO INTERVIEW: SAfm]** Stephen Grootes interviews AASA's spokesperson, Linden Birns, as [AASA takes note with grave concern of the imposition of jet fuel rations at Cape Town International Airport.](#)
- **23 September 2022. [PODCAST: VoyagesAfric Interview]** [Airlines Association of Southern Africa gears up for 52nd AGA](#) - in this interview AASA's CEO, Aaron Munetsi, promotes the AGA and this year's theme: ***My African Dream***. The AGA provides a unique platform for aviation industry stakeholders to share their aspirations for the industry, beyond the horizon of full recovery from the pandemic, and encourage the realization of *our collective dream* for a dynamic, resilient and sustainable aviation industry.
- **16 September 2022. [INTERVIEW: Engineering News]** [Industry perseveres despite turbulent period](#) - in this interview AASA's CEO, Aaron Munetsi, shares his views on the resilience of the SADC aviation industry, and the vital role air transport plays as the prime enabler and catalyst for stimulating intra-African trade, commerce and tourism.
- **8 September 2022. [PODCAST: AviaDev Insight Interview]** [A look back on Aaron Munetsi's first year at AASA and a sneak preview of the upcoming AASA AGA.](#) Jon Howell, Founder & MD of AviaDev, interviews Aaron Munetsi, AASA CEO and Tatum Kok, AASA's Aviation Analyst. They take a look back at Aaron's first year as CEO, and provide a sneak preview of the upcoming AASA AGA being held from 13 to 16 October at the Arabella Hotel, Golf & Spa.
- **12 August 2022. [RADIO INTERVIEW: Power FM 98.7]** AASA's CEO, Aaron Munetsi, was interviewed by Sonto Ndlovu for the [#POWERTalk](#) series about South African Tourism and Trade's 2021 [tourism recovery plan](#) and AASA's role in the tourism and aviation sectors, as well as the [recent price increase in flights and its impact on the tourism sector.](#)
- **6 August 2022. [MEETING: SA Minister of Tourism & AASA CEO]** [SA aviation sector pays higher charges and faces more stringent regulations than sister countries.](#) AASA's CEO, Aaron Munetsi, met with SA Tourism Minister, Lindiwe Sisulu, to outline several problems facing the country's aviation sector amid reports of airline seat shortages and the rising cost of flights, which is hampering the tourism sector's recovery from the 2020 pandemic.

- **26 July 2022. [VIRTUAL AASA ENVIRONMENT MEETING]** AASA's Environmental Committee hosted a [virtual meeting](#) on 26 July at 10am with Dr Ian Cruickshank.
- **12 - 14 July 2022. [VIRTUAL MEETING]** [US Trade & Development Agency \(USTDA\) East & Southern Africa Airspace Management Virtual Reverse Trade Mission \(RTM\) & Virtual Business Briefing](#). AASA's CEO, Aaron Munetsi, participated in the USTDA Virtual RTM, and virtual business briefing events hosted to expose sub-Saharan Africa's public and private sector leaders to U.S. aviation best practices, solutions, and services.
- **1 July 2022. [INTERVIEW: Air Transport News (ATN)]** In this interview AASA's CEO, Aaron Munetsi, shares his views on [AASA's challenges and priorities over the next 3 years, his vision as CEO, and the importance of SAATM and AfCFTA in achieving a successful and sustainable African and SADC aviation industry](#). **29 June - 1 July 2022. [CONFERENCE: AviaDev Africa 2022]** AASA's Aviation Analyst, Tatum Kok, attended representing Members at the [AviaDev Africa 2022](#) conference in Cape Town.
- **25 June 2022. [PODCAST: iXplore Africa]** Interview with AASA's CEO, Aaron Munetsi, provides [insight and shares his views on Intra-African Travel, Air Transport and Tourism](#).
- **13 to 15 June 2022. [ADDRESS: African Aviation Summit]** AASA's CEO, Aaron Munetsi, [gives the Welcome Address on 14 June at the African Aviation 2022 Conference - MRO Africa](#) in Johannesburg.
- **8 to 10 June 2022. [African Aviation Summit / Air Finance Africa]** AASA's CEO, Aaron Munetsi, a [Speaker](#) at the [African Aviation Summit - Air Finance Africa](#) in Johannesburg, shared his insights about the *Prospects for Airline Co-Operation and Consolidation in Southern Africa*.
- **6 June 2022. [INTERVIEW: Nomad Africa magazine]** In this interview AASA's CEO, Aaron Munetsi, shares his views on AASA's function and role in the SADC aviation industry: [Professionalism and access to contacts are essential to overcoming aviation challenges](#).
- **3 June 2022. [INTERVIEW/WATCH: Business Day TV]** [Comair suspension: Airlines Association says members not deliberately hiking prices](#). AASA's CEO, Aaron Munetsi, says Members are not deliberately hiking ticket prices after Comair grounding.
- **22 April 2022. [PANEL DISCUSSION: SACAA, National Aviation Conference 2022]** [Cleared for Take-off: The future outlook of aviation in South Africa](#). AASA's COO, Vivendra Lochan, participated in a panel discussion regarding how the local aviation industry is preparing to resume operations post pandemic.
- **11 March 2022. [RADIO 702 INTERVIEW]** Afternoon Drive with John Perlman and Aaron Munetsi, AASA CEO. [AASA's CEO shares updated news that new appointments to the \(air services\) council will now have to work through a 12-month-long backlog of applications for new routes](#).
- **2 March 2022. [PANEL DISCUSSION: SA Tourism, Meetings Africa, BONDay Educational Session 4]** AASA's CEO, Aaron Munetsi participated in a panel discussion regarding [challenges faced by the business events industry due to airlift in Africa](#).
- **1 March 2022. [INTERVIEW/WATCH Tourism Update Online]** [What the Southern African airline industry needs right now](#). AASA's CEO, Aaron Munetsi shares his insights on the airline industry's needs in the Southern African region.
- **14 February 2022. [INTERVIEW/WATCH: Business Day TV]** [Airline industry starts to recover from Covid-19](#). AASA's CEO, Aaron Munetsi comments on the slow recovery from the pandemic-related travel bans in the Southern African airline industry.



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- **10 February 2022. [INTERVIEW: Business Insider]** [SA airlines haven't been able to get new routes for almost a year – government says wait is almost over.](#) AASA's CEO, Aaron Munetsi comments on the dormant South African licensing councils and its effect on the industry.
 - **3 February 2022. [INTERVIEW/WATCH: CNBC Africa]** [Realising a pan-African airline.](#) AASA's CEO, Aaron Munetsi provides insight and comments on the developments of a pan-African airline.
 - **10 January 2022. [ARTICLE: AeroTime Hub]** [Turning the tide: How policy change is reshaping African air services.](#) AASA's CEO, Aaron Munetsi, supports the AU's SAATM and AfCFTA projects to increase intra-African connectivity for African airlines, enhancing intra-African trade, and regional integration between African countries for the ease of movement of resources, capital and passengers.
 - **14 December 2021. [AASA Press Release]** [AASA statement on UK relaxing travel restrictions on South Africa and other Southern African nationals.](#)
 - **3 December 2021. [PODCAST: SCIX African Trade Talks]** Interview with AASA's CEO, Aaron Munetsi, discussing [why air transport is expensive in Africa and how we can improve the aviation industry in Africa.](#) Following the open skies policy of AfCFTA, he discusses how it will boost trade, tourism, and what needs to be done to accelerate the policy.
 - **1 December 2021. [PODCAST/WATCH: AFRAA SkyConnect Dialogue December Edition]** [AFRAA Sky Connect Leadership Dialogue Series hosted a one-on-one dialogue with Aaron Munetsi, AASA CEO.](#) He discussed industry recovery in the SADC region; collaboration and competitiveness of airlines in the region; AASA's perspectives on consolidating the gains Africa has made in aviation; and how to accelerate the pace of rolling out key initiatives to spur continental development and integration.
 - **27 November 2021. [INTERVIEW/WATCH: eNCA / Courtesy #DStv403]** [Airlines Association of SA slams UK red list decision.](#) AASA's CEO Aaron Munetsi shares concerns about the new travel restrictions imposed on Southern Africa. It comes after the new Omicron variant was detected in South Africa, Botswana, Hong Kong and Belgium. AASA calls for the bans to be lifted.
 - **26 November 2021. [AASA Press Release]** [AASA urges UK government to reconsider decision to red list several Southern African countries.](#)
 - **24 November 2021. [SPEAKER: GBTA Southern Africa and International SOS Virtual Conference]** [Reigniting confidence in the Travel Economy.](#) AASA's CEO, Aaron Munetsi, shared his insights in the 12:50pm slot about lifting the fog for airline recovery.
 - **17 November 2021. [FEATURED ARTICLE: Southern Africa's Travel News by TNW].** [Regional Travel Feature: Unlock regional air routes!](#) AASA's CEO, Aaron Munetsi, provides insight into the state of southern Africa's airline and travel industry and the challenges to be overcome.
 - **3 November 2021. [INTERVIEW/WATCH: CNBC Africa]** [Aaron Munetsi, AASA CEO, on why it's so expensive to fly in Africa.](#)
 - **2 November 2021. [PODCAST/INTERVIEW: CapeTalk/702 radio]** [Travel & Tourism: Air transport industry needs urgent government intervention.](#)
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- 8 August 2021. [ARTICLE: [Sunday Times, Business Times](#)] [Flying in a holding pattern as cash burns.](#)
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- 2 August 2021. [ARTICLE: [Fin24.com](#)] [Recovery of aviation in Africa will take time, says new industry body CEO.](#)
- August 2021. [ARTICLE/INTERVIEW & PROFILE: [SA Flyer magazine](#)] [Wrenelle Stander – New AASA CEO and Woman in Aviation: Wrenelle Stander.](#)
- 30 July 2021. [SACAA Aviation Security Campaign launch] Wrenelle Stander shared a ‘Message of Support from Airlines’ at the [#YOSC event](#).
- 10 July 2021. [ARTICLE/INTERVIEW: [Daily Maverick](#)] Interview with outgoing CEO Chris Zweigenthal on his retirement and the aviation industry: [The sky’s the limit for outgoing CEO.](#)
- 1 July 2021. [AASA Press Release] [Wrenelle Stander appointed as AASA CEO.](#)



6. Regional Issues



AASA has 15 Airline Members of which 5 are South African-based airlines, and 10 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 issues and projects:

- **SADC Civil Aviation Committee business.** AASA is the only airline-based organisation that has a seat as a consultative member representing airlines on the SADC Civil Aviation Committee – *refer to item 3.2.1.*
- **Environmental Issues.** South African and regional Airline Members are invited to attend the Environmental Committee. AASA will attend to all issues impacting its Members whether on global programmes such as CORSIA or local programmes such as carbon taxes.
- **Cape Town Convention.** The work undertaken by AASA on this project could be utilised by regional Members requiring assistance in their State of 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 Namibia Civil Aviation Authority. In addition, due to the devastating impact of COVID-19, AASA made submissions to the 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.

7. Conclusion



With COVID-19 behind us, coupled with the major demise of South African and regional airlines, the recovery process has been challenging and slow, but AASA is confident the resilience of the industry will be evident in the coming year, and recovery will accelerate.

To conclude, on behalf of the AASA team, I wish to acknowledge the leadership and guidance of AASA's Board of Directors and Executive Committee who have provided support to the team during the past year. In particular, I wish to thank Mr. Elmar Conradie during his tenure as Chairperson, Ms. Agnes Khunwana, our Deputy Chairperson, all members of the Executive Committee, namely: Mr. Rodger Foster, Mr. João Jorge, Mr. Thomas Kgokolo, Mr. William Ndlovu and Mr. Vivendra Lochan, for their guidance, wise counsel and assistance as we dealt with Association business.

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 whole industry. We are acutely aware of the dire situation that many of our Members find themselves in as a result of the COVID-19 pandemic, and we wish each and every Member well during this tough 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 2021/22, and thank you all for the opportunities to engage and cooperate on regular agenda items, as well as the unprecedented developments arising from the pandemic.

And finally, to the AASA team: Mr. Vivendra Lochan, Chief Operating Officer; Ms. Celeste Breedt, 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

3 October 2022



8. Annexure A List of Members (as at 3 October 2022)



Associate Members

A
AerCap
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)
Astron Energy

B
Blake Emergency Services
Boeing

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

D
De Havilland Aircraft of Canada Limited

E
Embraer
Engen

F
FlightSafety International

G
GAAL Polokwane International Airport
GE Aerospace

H
Hitit
Hahn Air

I
Investec

K
Kruger Mpumalanga International Airport

L
Lanseria International Airport
Lufthansa Technik

M
MHI RJ Aviation

N
NAS Colossal Aviation Services

P
Pratt & Whitney
Puma Energy

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

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

Airline Members

A
Air Austral
Air Botswana
Airlink
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

T
TAAG Angola Airlines



Airlines Association of Southern Africa NPC (AASA)

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