AIRLINES ASSOCIATION OF SOUTHERN AFRICA

AASA

2024 / 2025

ANNUAL REPORT

Airlines Association of Southern Africa (AASA)

Serving the Collective Interests of the Aviation Industry in the SADC Region

The Airlines Association of Southern Africa (AASA) serves as the representative organisation for airlines throughout Southern Africa. It collaborates closely with leading aviation industry stakeholders and senior government officials on key issues such as policy, legislation, regulation, planning, operational efficiency, safety, security, and finance. These efforts are all aimed at supporting airline profitability and ensuring their long-term financial sustainability.

Mission and Focus

AASA's primary focus is on matters that directly affect the financial viability and sustainability of its Airline Members. The association is dedicated to helping its Members provide accessible and affordable air transport services across the SADC region and beyond.

History and Membership

Established in 1970 to represent the shared interests of Southern African airlines, AASA now includes **16 Airline Members** and **41 Associate Members**. The Associate Members encompass infrastructure providers, oil companies, major aircraft and engine manufacturers, ground handling companies, service providers, and other industry associations and partners.

Industry Leadership and Representation

AASA leads and coordinates the airline industry's position on critical issues such as airports, airspace, civil aviation, consumer legislation, environmental and tourism concerns, and media responses to major industry topics. The organisation also represents SADC-based airlines on the SADC Civil Aviation Committee as the designated Airline Consultative Member.

International Engagement

AASA regularly participates in and contributes to regional initiatives organised by the International Civil Aviation Organization (ICAO) and the International Air Transport Association (IATA), further strengthening the voice and influence of Southern African airlines on the global stage.

AASA Executive Team

Professor M. John Lamola Chairperson / South African Airways, Group CEO
Mr. Elmar Conradie Executive Committee / FlySafair, CEO
Captain President Dhlamini Executive Committee / Eswatini Air/RENAC, CEO
Dr. Namhla Tshetu Executive Committee / Airlink, Proxy
Mr. Aaron Munetsi CEO
Mr. Vivendra Lochan COO

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Acronyms & Definitions

AAA-SA	Association of Airports and Aerodromes Southern Africa (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 (affiliate of SACAA)
CIIME	Convention on International Interests in Mobile Equipment (known as the Cape Town Convention)
CORSIA	Carbon Offsetting and Reduction Scheme for International Aviation (affiliate of ICAO)
CAPEX	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)
FINCOM	Financial Committee
GAPP	Gauteng Area (or Airspace) PBN Plan
GBTA	Global Business Travel Association
GFA	Girls Fly Africa
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
RC	Regulating Committee
RCMS	Regulating Committee on Meteorological Services
RNAV	Area Navigation
RNP	Required Navigation Performance
SA	South Africa
SAATM	Single African Air Transport Market
SACAA	South African Civil Aviation Authority
SADC	Southern African Development Community
SAIAST	Southern Africa Institute of Aviation Science and Technology
SARS	South African Revenue Service
SAWS	South African Weather Service
SC	Steering Committee
SKA	Square Kilometre Array Project
TBCSA	Tourism Business Council of South Africa
TERS	Temporary Employer/Employee Relief Scheme
UFW	United for Wildlife
UIF	Unemployment Insurance Fund
USD	US Dollar
WOA	Wonders of Aviation (SA and USA) NPO

1. Introduction

1.1 Scope

The Airlines Association of Southern Africa (AASA) team hereby presents the 2024/2025 Annual Report detailing the activities and achievements during the year under review from 1 July 2024 to 30 June 2025. The work undertaken after the end of the financial year up to the 2025 Annual General Meeting (AGM), to be held on the 18th October 2025, 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.

Since the start of 2020, the COVID-19 pandemic has directed the narrative of every aspect of the world's activities, including the global, African and Southern African aviation industry. While AASA continued to drive the normal agenda of activities, the impact of the pandemic dominated business, and all aviation organisations had to navigate their survival. Since the easing of the pandemic aviation organisations have concentrated their efforts to recover domestic, regional and international operations for the period under review. Whilst improvements were evident in certain markets, the Region as a whole has not yet fully recovered.

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:

- Professor M. John Lamola, Chairperson
- Mr. Elmar Conradie, Executive Board
- Mr. Aaron Munetsi, Chief Executive Officer (CEO)
- Mr. Vivendra Lochan, Chief Operating Officer (COO)

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:

- Professor M. John Lamola, South African Airways: Group CEO
- Mr. Elmar Conradie, FlySafair: CEO
- Mr. Rodger Foster, Airlink: CEO/MD (retired on 31 March 2025)
- Ms. Lulu Rasebotsa, Air Botswana: CEO (resigned on 2 July 2025)
- Captain President Qiniso Dhlamini, RENAC/Eswatini Air: CEO
- Mr. Aaron Munetsi, AASA: CEO
- Mr. Vivendra Lochan, AASA: COO

2.3 AASA Team

The AASA Team during the year under review was as follows:

- Mr. Aaron Munetsi, CEO
- Mr. Vivendra Lochan, COO
- 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 re-joined AASA as an **Airline Member**:

- Air Mauritius (July 2024)

During the year under review, there were no **Airline Member** resignations.

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

- Skyway Aviation Handling Company (SAHCO)
- Sasol
- AEG Fuels
- Dentons
- Nucore Technologies
- Gateway Airport Authority Limited (GAAL)

During the year under review, there were no **Associate Member** resignations.

The Association currently has **16 Airline Members** and **41 Associate Members**. AASA Members are listed as Annexure A at the end of this report.

2.5 Black Economic Empowerment Accreditation

AASA's accreditation status for the period under review is at Level 1.

2.6 Financial Matters

An Audit of the 2024/2025 financial year has been completed by the external Auditors, Van Sitterts. The Annual Financial Statements and the Audit Report will be presented to the Annual General Meeting on the 18th October 2025 for ratification 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 registered office for scrutiny by authorised and paid-up 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 was signed into law effective 4 March 2021, the advent of the COVID-19 pandemic has delayed the finalisation of this legislation. Consultation on the drafting of regulations to underpin the amended legislation is outstanding. AASA have been requested to be part of the Steering Committee (SC) overseeing the development of Regulations for both the ACSA and ATNS Amendment Bills.

3.1.2 Permission Programme for ACSA and ATNS

The 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 (RC) proposed a further delay to the commencement of the new Permission to 1 April 2023.

During the period under review and the previous year, planning commenced for the next Permission for the period 1 April 2023/2024 to 31 March 2027/2028. A series of meetings were held between the RC, the industry, ACSA and ATNS to discuss the new Permission. The first consultation meetings between the industry, ACSA and ATNS were held during March and April 2022 with the consultation sessions continuing until the final submission is made to the RC by the 30 September 2022 which has now being extended to a date to be advised.

The financial impact on the industry has proved to be devastating, and together with the uncertainty on 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 RC 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 travel experience in the pandemic period.

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 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 BARSA) had made representations to the RC with regards 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 very steep 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 2018/2019 – 2022/2023 Permission period will be reviewed during the forthcoming Permission process.

The tenure of the present RC has been extended until the appointment of the incoming RC.

b. Permission: *2022/2023 to 2027/2028*

In preparation for the next Permission, ACSA presented to the industry their requirements for Capital and Operating expenditure for the next five years. Industry requested clarity and information on various issues that were presented, and then submitted a detailed response to the RC in this regard.

The new Permission was expected to commence on 1 April 2023, this was delayed due to the request from ACSA for an extension of time for the submission of their Permission application. Consultation meetings have been held between ACSA and the industry in preparation for the new Permission which was scheduled to commence on 1 April 2023 and continue until 2027/2028. The expected date of submission was 30 September 2022, this was extended to 30 November 2022.

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

- Consultation meetings were held between ACSA and the industry on 24 and 25 October 2022, and 8 February 2023.
- ACSA submitted its final application on 30 November 2022 for the 5-Year Permission Period of 2023/2024 – 2027/2028.

- The new Permission was expected to commence on 1 April 2023; however, this was delayed due to the request from ACSA for an extension of time for the submission of their Permission application.
- The RC appointed Consultants to assess the Permission application
- Initial indication is there will be an upward adjustment of tariffs subject to the final determination by the RC.
- The RC granted ACSA a temporary inflationary increase of 4,4% effective 1 May 2023.
- However, timelines have been announced by the RC for the current Permission. The RC issued a draft Permission on 25 August 2023. The proposed tariff increases for ACSA amounted to 4,5% effective 1 April 2024; 9,5% in April 2025; 7,3% in 2026; 6,9% in 2027; and 4,4% in 2028.
- The RC met with the industry on 29 August 2023 and 11 September 2023, and the industry made an additional submission on 18 September 2023. The plan was to submit the Permission to the Minister of Transport for approval and gazette the draft Permission by the end of September 2023.

The Final Permission for 2023/2024 to 2027/2028 was published in the Government Gazette No. 49969 dated 2 January 2024 for tariffs effective 1 April 2024. The increase in charges range from 9,7% to 10,7% which is in line with the RC's Permission determination. The Permission period runs for 5 years (we are in the second year of the Permission). An inflationary increase of 4,5% was permitted by the RC for the 2023/2024 year.

Effective 1 April 2025 the Passenger Service Charge/Landing/Parking fees will increase by 6,51% as per agreed Permission for 2025/2026 year. This is the Third Year of the current Permission 2023/2024 to 2027/2028. The projected spend up to 2028 amounts to R23,4 billion.

The consultation process for the new Permission has commenced for the next five years i.e 2026/2027 to 2030/2031. Consultations with the relevant stakeholders is ongoing.

Immediate priority is on high impact refurbishment and critical infrastructure upgrades within the first two to three years of the Permission to minimise the risk of service failure. Estimated projected expenditure over the next 10 years is in the region of R64 billion.

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 pandemic's impact on travel.

ATNS has requested the inclusion of Non-Regulated Assets as part of the current Permission. The RC will make the final decision after consultation with the industry. The commencement date of the new Permission would have been 1 April 2023 extended to 31 March 2028, however, the commencement date has been delayed.

Ongoing user consultations have been held until finalisation of the new Permission which extends beyond the original 30 September 2022 deadline.

- The RC granted ATNS an inflationary increase of 4,4% effective 15 April 2023 until the new Permission is finalised. User consultation meetings, if required, will be ongoing until the finalisation of the Permission process.
- Detailed and robust consultation with the industry were held. Timelines have been announced by the RC and are the same as for ACSA.
- The RC issued a draft Permission on 25 August 2023. The proposed tariff increases for ATNS amounted to 4,5% effective 1 April 2024; 10,3% in April 2025;10,2% in 2026; 10,2% in 2027; and 10,2% in 2028.
- The RC met with the industry on 29 August 2023 and 11 September 2023, and the industry made an additional submission on 18 September 2023. The plan was to submit the Permission to the Minister of Transport for approval and gazette the draft Permission by the end of September 2023.
- Government Gazette (GG) no. 50041 was published on 26 January 2024 where Air Traffic charges were increased by 4,5% effective 1 May 2024. This differs from the Draft Permission published in October 2023 where the increase was 10% for the 2024/2025 year. The ATNS Permission, with respect to tariffs, is currently under review by the Minister of Transport, therefore the 4,5% increase may be a temporary arrangement.
- A GG issued in January 2025 by ATNS advising of increases effective 1 April 2025 of between 18,7% - 24%. For the previous two years inflationary increases were applied, therefore effective increases were applied from 1 April 2025. The RC and the industry objected to these high increases as they were not what was agreed in the Permission. Subsequently, ATNS withdrew the said GG, and a revised GG was issued on 11 April 2025 whereby the tariffs were revised downwards. This is the Third Year of the current Permission 2023/2024 to 2027/2028. Consultations for the Permission 2026/2027 to 2030/2031 have been completed. There were eight User Consultation engagements and six CAPEX Work Groups. The engagements were transparent, and information requested was shared timeously. Projected CAPEX spend over the next five years amounted to R3,2 billion. Industry requested ATNS to prioritise Capital projects. A double digit tariff increase was proposed for the 2026/2027 year. Industry has raised concern. Final determination of the tariffs will be recommended by the RC to the Minister of Transport for approval.

b. Operations

- ATNS Operational and Planning issues continue to be driven through the ATM/CNS implementation committee and the many working groups that contribute to the improvement and efficient use of airspace.
- SKA and Aviation co-exist with respect to aviation frequencies. The aviation radio frequencies will be maintained – this is work in progress.
- The suspension of instrument approaches to certain airports viz GRJ/KIM/UTT/PTG/RCB have disrupted air services.
- The key priority of ATNS is keeping the skies safe. The maintenance procedures are based on both local and international standards, and local procedures are currently under review to ensure they align with global advancements in aviation technology and safety requirements. Airlines experienced a huge number of delays.

- The lack of timeous maintenance has caused many unforeseen and additional costs for airlines.
- Some, but not all of the instrument flight approaches to ORT/CPT/BFN/PZB/UTN/ELS are also suspended.
- Industry offered to assist with the sourcing of external expertise to address the challenges.
- The Minister of Transport appointed a Committee of Experts in December 2024 when it became apparent there was a backlog in establishing valid and updated instrument approaches at South African airports (begining in July 2024).
- The Committee of Experts report identified staff shortages, and unreliable navigation system gaps in safety practices and governance.
- SACAA permitted alternative means of compliance for instrument flight procedures until April 2025, this has subsequently been extended to the end of November 2025.

The matter of instrument flight approaches is a top priority for ATNS management and the industry. Regular update meetings are held to advise the industry of improvements and the reinstatement of instrument flight approaches at the said airports.

The focus is on accelerating contracts with international flight procedure designers, charting specialists and the training of Flight Procedure Designers locally.

ATNS held its Annual Operations Committee meeting (OPSCOM 35) on 28 July 2025 where the following priority issues were discussed:

- Permission CAPEX Project Status Report.
- Safety Performance.
- CNS Infrastructure Availability Report.
- Human Capital.
- Customer Satisfaction.
- Airspace Optimisation Procedure Programme: flight procedure and airspace design changes, capacity declaration, UAS airspace integration risk assessment, and free route airspace implementation.
- Research Initiatives.
- Green Air Traffic – Passive Radar.
- Information Papers: flexible use of airspace statistics, traffic forecasts, operational efficiency, space weather training, and space objects affecting South Africa's airspace.

The CNS/ATM Implementation Committee continued to operate effectively throughout the year, supported by the work of the working groups. This work feeds into the Industry Financial Committee (FINCOM) and Permission consultations process.

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 input to the annual tariff discussions held between the RC for Meteorological Services (RCMS), SAWS and the airline industry.

- Consultations between the RCMS and the industry was completed in January 2025 for tariffs applicable to the 2025/2026, 2026/2027and 2027/2028 period.
- The proposed tariffs for the above period amounted to R75,08 (10,6% increase from 1 April 2025), a reduction for the 2026/2027 year at R66,05 and R66,44 for the 2027/2028 year.
- The Minister of Transport finally approved the above tariffs in GG53104 from 1 August 2025 (a delay of 4 months).
- Note that increases and decreases in tariffs are highly dependent on traffic service units, while the industry has not yet fully recovered from the effects of the COVID-19 pandemic.
- Consultations for the next three years: 2026/2027, 2027/2028 and 2028/2029 will commence in late October /early November 2025.
- AASA will continue to engage with the RCMS and SAWS to obtain the best outcome for its Members, stressing the importance of efficiency improvements in operational performance.
- It is pleasing to note the operational performance in terms of the forecasts is above target in all functional areas.
- The ICAO option of a Space Weather Recovery charge for the Airline Operator was not supported by the industry. States will bear the cost until the parameters are clearly defined for Airline Operators on what exactly they will be paying for.

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 in 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, the 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 increases in the Namibian Government Gazette of 80% and 67% of the safety fee for domestic and international per occupied seat respectively on 13 September 2021. AASA together with IATA issued 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 Namibian Minister of Works and Transport. At the time of this published annual report, the final date of implementation is still to be decided. In the interim, the current practice of charging on capacity is applicable.

3.1.7 Zambian Airports Corporation Limited (ZACL) Consultation

AASA together with IATA and Airline Members attended a consultation meeting with ZACL on the proposed ANS charge increase of 35%. The last increase was nine years ago. AASA and IATA made representation that the tariffs be spread over three years. ZACL is considering the industry proposal.

3.2 African Aeropolitical Issues

3.2.1 SADC Civil Aviation Committee (CAC) Issues

- **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 such as 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.
- It was noted that 38 African Union Member States have signed the SAATM solemn commitment.
- Nine SADC Member States have signed committing to the implementation of SAATM.
- **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 was 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 Slot Compliance waiver that was introduced due to airline operations being impacted by the COVID-19 pandemic is no longer applicable, normal slot rules apply. Capacity declarations for the IATA Winter Season commencing 26 October 2025 to 28 March 2026 at the three ACSA airports (JNB/CPT/DUR) was approved by the Department of Transport. The Capacity declarations for the IATA Summer Season commencing 29 March 2026 to 24 October 2026 have been published. Airline Members have reported slot allocation challenges during peak times. Going forward airlines were requested to forward suggestions on how to address the Historic Baseline Date and the proposed slot use rule.

- **ICAO State Letters**
  AASA obtains and provides comment and feedback including from Airline Member subject 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 Assembly**
  The DOT invites AASA to be part of the South Afrian delegation to the ICAO Assembly. Mr. Aaron Munetsi joined the South African delegation attending the 42nd ICAO Assembly in Montréal held from 23 September to 3 October 2025. At the time of publishing this annual report, the next ICAO Assembly date has not confirmed.
- **National Facilitation Committee**
  This Committee, convened under the Chairship of the DOT, meets on a quarterly basis. 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, Annex 9 filing of differences, and the status of the Civil Aviation Amendment Act. The establishment of Airport Facilitation Committees at international airports, and preparation plans for future pandemics is also a 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 the industry, meeting with the RC during the Permission consultations with ACSA and ATNS.
- **Broad-Based Black Economic Empowerment (B-BBEE)**
  AASA participation is 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, while there were a number of engagements with the DOT appointed consultants, there has been no further progress with respect to finalising the revised Aviation Sector Codes. Members have been appointed to the resuscitated Transport B-BBEE Charter Council by the Minister of Transport, and they will be tasked with finalising the new Charter. Mr. Aaron Munetsi has been appointed to serve on the Transport B-BBEE Charter Council. Industry is awaiting the publication of the revised Aviation scorecard. The Domestic Licencing Services Council's requirement of requesting evidence of B-BBEE rating was overturned by the High Court as reported in the media.
- **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 the 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 the following 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.
  - The proposed regulations have gone through the CARCOM process, and the industry awaits approval from the Minister of Transport.

- 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 DOT and the industry are essential to address several important matters requiring discussion and resolution prior to the finalisation of the Amendment Bill.

  The DOT has appointed legal consultants to provide an overview and recommendations to improve the entire regulatory process applicable to aviation. AASA together with other industry entities have participated in discussions with the legal consultants.

  The DOT is in the process of reviewing the Air Services Bill. AASA, Airline Members and industry associates participated in four engagements with the DOT during 2025. The Draft Services Bill will be published for public comment once finalised. The Minister of Transport has appointed the members of the Air Services Licensing Council (Domestic) and the International Air Services Council effective 1 April 2025.

- **Draft National Civil Aviation Policy Review**
  The Draft National Civil Aviation Policy was published for comment on 23 May 2025. The date for the submission of comments was 23 June 2025. AASA enlisted the services of legal advisors, held joint engagements with Airline Members, resulting in a consolidated submission to the DOT on 23 June 2025.
- **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 must be harmonised with the ARCC and the Airport Authority.

  - It has been recorded that the South Africa 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.
  - Funds amounting to R1 billion have been made available for the maintenance and refurbishment of the C130's to be used in long-range search and rescue. Marshall Aerospace completed upgrade work on the C-130BZ at the end of 2024. The second aircraft was completed in October 2024. Marshall Aerospace now train the SAAF and Denel technicians on the modification implementation processes; it is planned that four additional C-130 aircraft will be serviceable.
  - Engagements are ongoing with surrounding rescue coordination centres to obtain assistance. The multilateral agreements which South Africa has for the provision of search and rescue are also being scrutinised and updated to ensure the country is cognisant of its obligations.
  - The DOT has confirmed that agreements are in place for the use of long-range aircraft for search and rescue.

3.4 South African Civil Aviation Authority (SACAA)

AASA works closely with SACAA in several of the following areas:

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 and work group work.
- The 31st Amendment Regulations was approved and promulgated by the Minister on 28 March 2025. The bulk of these regulations will come into operation upon the Proclamation of the Civil Aviation Amendment Act by the President of South Africa.
- SA-CATS 2 of 2025 were approved by the Director on 19 June 2025 and published on 20 June 2025. These Technical Standards incorporate the selection of proposals approved by CARCOM, which are not dependent on the 33rd Amendment Regulations, which are underway.
- AASA on behalf of its Members proposed a Part 145.01.2(1) (b) amendment submission to CARCOM on 19 August 2024. Present regulation stipulates that Class 11 and Class 111 aircraft components supplied by MROs and component manufacturers must be approved/registered with SACAA. Industry proposes Class 11 and Class 111 components should be acceptable with an authorised release certificate, issued by an organisation with the appropriate rating issued under this Part, or an equivalent release document issued by an organisation approved by the national airworthiness' authority, and of an ICAO Contracting State, provided their status is in good standing with ICAO and SACAA.
- The local airlines/AMOs have the SACAA-approved Manual. SACAA has now signed bilateral agreements/Memorandum of Understanding with the UK Civil Aviation Authority and EASA. The principle has therefore been set and AASA would like to encourage SACAA to continue their efforts to extend this to the other authorities namely the FAA, Transport of Canada Civil Aviation (TCAA) and the National Civil Aviation Agency of Brazil (ANAC) for a start, as opposed to the proposal that the industry should be compliant by ensuring all the organisations they send components to are SACAA-approved of procedures, with documented policies to only receive components that have traceability, meaning the history of the components are available and is accompanied by the relevant release certificates, from reputable organisations, that hold approvals from competent authorities. That alone is the first step of oversight. These components are then installed in accordance with the OEM's documentation and subjected to operational and functional testing to confirm their serviceability prior to releasing the aircraft/engine/propeller to service. The work is performed by SACAA-licensed and company-certified staff. This is an added layer of oversight to ensure the serviceability of the components.
- The proposed amendment to the regulations will not impact aviation safety as the organisations have already been approved and certified by competent authorities. SACAA and the industry are in discussions to find an acceptable solution that will be practical and contribute to the sustainable growth of the industry.
- 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 costs responsibility of airlines.

Regulations for Passengers with Disability

As reported previously, proposed amendments submitted to CARCOM by AASA and ACSA were withdrawn as several stakeholders were unhappy with the proposals and the process followed. The DOT, SACAA and the industry have recommenced the process of drafting amendments to the current regulations and technical standards.

National Airspace Committee (NASCOM)

AASA participates as a member of NASCOM and consults with airline specialists where necessary to ensure 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 Square Kilometre Array (SKA) project. Due to uncertainty over the 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, these 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, and it's now up to DSI to set up SC meetings to address the technical challenges. The DOT will set up technical meetings as required. SACAA and the Independent Communications Authority of South Africa (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.

Technical meetings are being held to address the concerns raised by the aviation sector. In the interim, aviation can continue to operate as is without any constraints.

An update from SACAA is that the SKA Technical Working Group (TWG) has finalised the Terms of Reference (TOR). The SKA TWG has started to work on radio frequency interference as per SKA current regulation and related matters. The Sub-TWG has begun its technical work, which will provide guidance on how future regulations should be structured to allow the aviation and astronomy industries to coexist. The Airspace Planning Group and the Sub-TWG have now merged into a single group to avoid parallel discussions on the co-existence of radio frequency spectrum usage in the Karoo Area, which is chaired by the aviation industry and DOT. This is work in progress.

Finance - SACAA Passenger Safety Charge, Fuel Levy and Fees

Following consultations with the industry, SACAA proposed a CPI increase for the next two years applicable from 1 April 2024. AASA and the industry supported a CPI increase for one year due to the consequences of the pandemic on air travel, and that the industry had not reached pre-pandemic performance levels. The User Fees and Passenger Safety Charge increase of 4,9% is awaiting approval by the Minister of Transport, and the Minister of Finance.

SACAA published the Thirtieth Amendment to the Civil Aviation Regulations, 2024 in GG 51114 dated 23 August 2024. The Passenger Safety Charge (EV) charge on the airline ticket was amended to R30.77 (Thirty Rands and Seventy-Seven cents) per passenger departing from any South African airport to a domestic or international destination for flights effective 1 October 2024. The EV charge was R29,33 (Twenty-Nine Rand and Thirty-Three Cents). This represented an inflationary increase of 4,9%. There was a 6-month delay in implementing the increase.

SACAA published the Thirty-Second Amendment of the Civil Aviation Regulations, 2025 in GG 52205 dated 28 February 2025. The Passenger Safety Charge (EV) on the airline ticket was amended to R32,19 (Thirty Two Rand and Nineteen cents) per passenger departing from any South African airport to a domestic or international destination for flights effective 1 April 2025. The current EV charge is R30,77 (Thirty Rand and Seventy Seven cents).

The Fuel Levy increase of 4,9% was effective from 1 August 2024, this is applicable where no Passenger Safety Charge is collected. Effective 28 April 2025 a fuel levy of R0,2286 per litre is applicable.

Part 187.03.1 which prescribes the opening of Trust Accounts by airlines with respect to the Passenger Safety Charge has been deliberated on, and is awaiting approval by the Minister of Transport.

CARCOM Meeting Documentation Circulated to Members

AASA acknowledges the contribution by Members who provide comment on regulation and technical standards amendment proposals.

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, accident and incident statistics, specific safety, security, and industry-related matters. SACAA achieved a 92% score in the ICAO Audit conducted in 2023, an improvement of 5% on the previous Audit, a notable accolade for SACAA and the industry.

The current information indicates that South Africa's Effective Implementation (EI) is ranked second out of 54 African States, and 21st in the world ranking of 193 ICAO Member States.

A Corrective Action Plan (CAP) was submitted to ICAO. ICAO has reviewed all the submitted CAPs, the latest being the CAP in the audit area of AGA, reviewed in January 2025. This resulted in three CAPs having to be re-worked and re-submitted for further review by ICAO. 90% closure of SACAA-specific findings has been achieved in Q4 against the yearly target of 80%. ICAO conducted off-site validation and our EI moved from 91.11% to 91.38%.

Civil Aviation Authority Captains of Industry Forum

With the Director Civil Aviation as Chairperson, the Captains of Industry Forum meets on a bi-annual basis. 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 attendees at this Industry Forum. The purpose of this Forum is to update Captains of Industry on important matters regarding the oversight role of the Regulator.

Civil Aviation Authority Flight Operations Forum with Airlines

This is covered on a need and request basis from Members. AASA will initiate such meetings with SACAA dependent on the interests of Members.

Environment

SACAA has the responsibility of monitoring and managing the process of reporting emissions by airlines. The CORSIA-verified reports of carbon emissions for 2023 was due at the end of April 2024. South Africa will participate in offsetting requirements with respect to CORSIA from July 2027 onwards.

CORSIA Implementation Deadlines

In accordance with Appendix 1 to Annex 16, Volume IV, these are the key CORSIA implementation deadlines for 2025:

- **1 January to 31 December 2025:** Aeroplane Operators (AOs) monitor their 2025 CO^2 emissions in accordance with their approved Emissions Monitoring Plan. AOs attributed to the State have submitted their Emissions Monitoring Plan for 2025.
- **1 January to 30 April 2025:** AOs compile 2024 CO^2 emissions data to be verified by verification bodies.
- **By 30 April 2025:** AOs and verification bodies to submit to States the verified Emissions Reports and associated Verification Reports for 2024 CO^2 emissions. AOs are encouraged to submit their verified reports on the specified deadline to allow State sufficient time to conduct order of magnitude check. Verified reports are essential to avoid data gaps and errors due to estimation as this may result in sub-standard data and large amounts of offsetting requirements.
- **By 31 July 2025:** States perform an order of magnitude check of the submitted 2024 CO^2 emissions, including any filling of data gaps in case of non-reporting by AOs, consolidate all reported CO^2 emissions data, and use the CORSIA Central Registry (CCR) to report to ICAO aggregated 2024 CO^2 emission data and, if applicable, information on CORSIA eligible fuels.

The ICAO Assistance, Capacity-building and Training for Sustainable Aviation Fuels (ACT-SAF) Programme has the objective of enabling States to develop their full potential in SAF development and deployment, in line with ICAO's *No Country Left Behind* Initiative.

Approval has been received from the Minister of Transport for the business implementation study to be conducted in the country by ICAO. The activities remain within SACAA as the focal point. The study aims to highlight feedstocks and pathways for SAF production in South Africa, the Implementation Support and Financing needed, and an Action Plan for the State. The study also aims to identify prospects for the establishment of a domestic SAF supply chain, indications of feedstock availability, viability of production pathways, supplemented with sustainability, and life-cycle assessments, as well as preliminary assessments of SAF production costs and market supply/demand.

3.5 Aviation Jet Fuel Forum

3.5.1 Transnet Pipeline Tariff Application

Industry had made representations to the Energy Regulator, NERSA, for the increase in Transnet pipeline tariffs for 2024/2025. Transnet had applied to NERSA for an increase of 83% in pipeline tariffs for FY2022/2023.

- Transnet has applied for a 20.87% increase in the Allowable Revenue, which translates to an increase of 25.60% in tariffs, resulting in an increase of approximately R15.81 cents per litre (cpl) in the fuel price in the FY2024/2025 (up from R61.74 cpl to R77.55 cpl).
- It should be noted that Transnet does not charge its regulated pipeline tariffs directly to the airlines but to the airlines' jet fuel suppliers (including oil companies, through-putters, agents etc.). The jet fuel suppliers charge these tariffs to the airlines as part of the transport cost of jet fuel. In addition, jet fuel is transported by rail (Transnet Freight Rail) from Durban to Gauteng and these non-regulated tariffs are negotiated between Transnet and the jet fuel suppliers on a commercial basis.
- Industry had made a submission to NERSA outlining the concerns if such an increase is approved, Industry is awaiting a response from NERSA.
- The Regulator had 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

Fuel Forum meetings chaired by ACSA are held on a quarterly basis, or when the need arises, to address concerns of low stock levels.

While supply issues were experienced at certain airports, in general there is an improvement. Fuel stock levels at the major airports of ORTIA, Cape Town and King Shaka International are stabilising, and when there is a need for intervention, this is being managed timeously.

ACSA's immediate focus is on strategic issues, security of supply and the CAPEX programme relating to fuel. Industry role players have agreed that a long-term solution for the urgent security of fuel supply at South African airports needs to be prioritised to avoid a total stock out. Airlines carried the industry by incurring additional costs by tankering and trucking in fuel supplies for their operations when required.

Notwithstanding the above, 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 the airport is being discussed.
- *Restarting full 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.
- On a positive note, Industry welcomes the announcement that the Central Energy Fund (CEF) has purchased the Durban Refinery which is to be recommissioned to become operational.
- Concerted efforts and representation by ACSA and the fuel industry resulted in SARS extending the temporary SOS licence for the importation and distribution of Jet-A1 for a further 12 months until 31 October 2026.

AASA will continue to monitor fuel stock levels and work closely with all stakeholders to ensure the security of supply to all airports.

3.6 Department of Home Affairs, South Africa

The focus of the Department is the expansion of biometric systems, e-visas, and e-passports. AASA has been advocating a visa regime of visitor visas to be issued upon arrival for bona-fide tourists and business people for a set duration of days, provided certain conditions and checks 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. Recent announcements in the improvement of the visa issue were warmly welcomed by the industry. The introduction of an Electronic Travel Authority for all incoming visitors into the country will be rolled out on a test basis for the G20 Delegates in November 2025. Tourism is an essential component to driving economic activity and the creation of jobs.

3.7 Environment Challenges

3.7.1 Global Initiatives

The 42nd ICAO Assembly was held from 23 September to 3 October 2025 in Montréal, comprising the 194 Member States of ICAO which 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 volunteered for the pilot and first phase 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 and its aftermath 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 used as a base going forward. However, due to the prohibition on scheduled air services globally, which was expected to lead 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 not to 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 most fair and reasonable solution.

On 1 January 2024, CORSIA started its First Phase, during which the total number of participating States amounted to 126 and the offsetting requirements kicked off. Three more States (Comoros, Mauritania, and Saint Lucia) will participate in CORSIA from 1 January 2025, bringing the total number of participating States to 129.

From 2027, all international flights will be subject to offsetting requirements. However, flights to and from Least Developed Countries (LDCs), Small Island Developing States (SIDS), Landlocked Developing Countries (LLDCs), and States that represented less than 0.5% of global international RTK in 2018 will be exempt from offsetting requirements unless these States participate voluntarily. States from/to which flights are expected to remain exempt after 2027. For more information visit the CORSIA factsheet.

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 made written representation to the Minister of Finance to request a postponement of the implementation of the Carbon Tax for a period of one year. However, this was unsuccessful. AASA then approached the Minister of Finance and the SARS team with a further request to postpone the implementation of the Carbon Tax for domestic aviation. The government has extended the first phase of the Carbon Tax by three years to 31 December 2025 in an effort to support business in their clean transition endeavours.

Effective from 1 January 2025, the carbon tax rate has increased from R190 per t/CO2e to R236 per t/CO2e. This rate will increase further in the future. Emissions reports for all qualifying airlines were due at SACAA by 30 April 2025 for the 2024 year and these must be verified reports. South Africa is still set to participate in offsetting from 2027 with regards CORSIA.

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 Mr. Ian Cruickshank as its Environment and Wildlife consultant. Mr. Cruickshank has been appointed as UfW's Transport Taskforce Manager for Southern Africa and they have given approval for him to work 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 will work closely with UfW in this area and contribute to making a difference in critical wildlife and environmental initiatives.

AASA's Environmental Committee will reconvene in 2026 and is the lead airline association committee on the continent on environmental matters.

AASA also contributes towards the training and development of its Members in order 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 Airline Members.
- AASA nominates an Airline representative to serve on the management committee of the Aerospace Chamber of TETA after requesting suggestions from its Airline Members and when the Aerospace Chamber advertises for nominations.
- AASA Skills Development Training Programme. AASA arranged training programmes for the benefit of its Members' employees; and to promote transformation in South Africa. To-date a total of 1951 employees from its Airline membership received training in various disciplines. However, due to COVID-19 and lockdown regulations, this programme was curtailed, firstly due to an inability to hold these courses and secondly, to achieve cost savings for AASA. AASA reassessed the programme for the 2022/2023 financial year, funds were allocated to recommence the AASA Industry Training programme. IATA had agreed to partner with AASA in providing training for Environment and Sustainability, with IATA providing support of up to 90% of the costs. AASA in partnership with IATA held sustainability training courses during the period under review.
- Aviation and the Environment, SAF, Environment Management Systems, and Sustainability Strategy.
- AASA in collaboration with AviaPro Consultants hosted an information session on 1 August 2024 on Sustainability and SAF.
- 33 participants from Airline Members attended seminars on Peer Support from 11 to 13 September 2024 and International Air Law and Policy from 18 to 20 September 2024. These seminars were held in partnership with the AviAssist Foundation.
- Sustainable Aviation Fuel Workshop for the Africa Airline Industry in partnership with IATA was held on 29 and 30 October 2024 at the Protea Hotel by Marriott OR TAMBO. 50 attendees participated in-person and virtually.
- A joint workshop on SAF co-hosted by IATA/AASA and SACAA was held on 1 September 2024. 40 airline delegates attended in-person.
- AASA is partnering with ICAO, IATA, AFCAC and AFRAA to hold a Charges/Taxes workshop for airlines and airports in Dakar, Senegal from 28 to 30 October 2025.

Members are reminded to advise AASA of their training requirements in order to determine the courses that are required, as well as identify the critical areas where skills are needed.

AASA-endorsed NGO/NPO Education, Social and Community Initiatives

AASA endorses and supports the following NGO/NPO initiatives that promote aviation through social and community projects, skills development, education and training programmes:

Girls Fly Africa (GFA)

GFA is dedicated to empowering the youth, girls and women in the Science, Technology, Engineering, Arts and mathematics (STEAM) field, focusing on the aviation and aerospace industry. The GFA mission is to transform lives one girl at a time by providing a clear path to success through our four pillars: Education, Outreach, Innovation and Technology. The GFA approach is to create a pipeline through focused programmes that grow in intensity and are tailored to develop each learner's aspiration. GFA have innovative programmes and initiatives to unlock the opportunities that STEAM, focusing on the aviation and aerospace technology industry, offers young girls and youth in Africa.

MayDay-SA

MayDay-SA is a peer-based network supporting the well-being of every South African aviation licence holder, thereby contributing to safety within the aviation community. MayDay-SA has its roots in the Airline Pilots Association's (ALPA-SA) Peer-to-Peer Programme – an initiative to provide volunteer support to fellow pilots who are experiencing difficult circumstances such as the impact of accidents and incidents, or life crises. Peer-to-Peer fills the gap in the industry for supporting the emotional wellbeing of pilots. The key benefit of Peer-to-Peer is that, as pilots, the volunteers understand the unique stressors and demands of the operational environment.

Southern Africa Institute of Aviation Science and Technology (SAIAST)

SAIAST is an aviation training college located in Lusaka, Zambia. Renowned as one of the region's top institutes, they offer unparalleled aviation training, including Undergraduate, Postgraduate, Vocational, and Online programmes. SAIAST's world-class faculty, innovative learning approach, and commitment to nurturing talent. Students experience an optimal learning environment that stimulates growth and innovation, ensuring career paths after graduation.

Wonders of Aviation (WOA)

Inspiring and Supporting Tomorrow's Aviation Leaders

WOA is an NPO that uses the magic of flight to inspire and educate previously disadvantaged youth about the aviation industry, and to engender a life-long love of learning. WOA supports the aviation industry's outreach programmes that encourage learners to consider a career in aviation, while focusing the majority of its efforts on individuals to become mentors and future aviation industry leaders.

3.9 Legal Matters

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

In view of the current environment with challenges to the survival of the airline industry, 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 the Airline Working Group (AWG) and our attorneys on this matter during 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 the International Airline Working Group (AWG) have worked on further proposed amendments to the draft Amendment Bill and Regulations, these proposals have been submitted to the DOT. Further consultations are expected with Government to commence the legislative process to incorporate the provisions into South African domestic legislation. Some progress is expected to be made in 2026.

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. 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 DOT 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.

Historical information has been included to provide context to the issues. AASA has requested a further consultation be held on all 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 concern and requested consultations. AASA and Industry appeared before the Portfolio Committee on Transport.

Further amendments were proposed by the DOT, 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 SACAA. The Amendment Bill was approved by Parliament on 11 May 2021.

The President signed the Civil Aviation Amendment Bill on 7 April 2022. The regulations pertaining to the establishment of a Trust account have been completed, and is awaiting approval from the Minister of Transport. 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 several important issues that need to be addressed and further consultations with industry are required. Updated information is covered under *3.3* above.

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 engagements.

Travel and tourism have, together with aviation, been severely impacted by COVID-19, with almost all travel and tourism business being prohibited from engaging in business, except where permitted for business and essential services, and for 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. The Travel and Health protocols were lifted in May 2022.

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.

Mr. Aaron Munetsi and Dr. Namhla Tshetu (Airlink) are the AASA-appointed Directors of ACS, and Mr. Vivendra 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:

Legal proceedings were launched in the High Court (Gauteng, Johannesburg) on 14 June 2022 under case number 22/20741 by Aviation Co-ordination Services (Pty) Ltd (ACS), the Airlines Association of Southern Africa (AASA) and the Board of Airline Representatives of South Africa (BARSA). As at this financial year end, the case is still pending in the Gauteng High Court.

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.

On 28 February 2025, the court granted ACSA and SACAA leave to appeal the November 2024 orders, confirmed that the mandamus remained in force and ordered compliance within 10 days. Their subsequent appeals to the Full Court were dismissed on 2 May 2025 due to lack of jurisdiction, with the court confirming that the mandamus is interim and not suspended pending appeals. Following the above court decisions, mediation was held on 29 and 30 July 2025 between ACS, AASA, BARSA, ACSA, and the Minister of Transport. The mediation addressed, amongst other matters, the interim installation of back-up hold baggage screening units, the dispute over responsibility for hold baggage screening, and related legal, financial, and contractual matters. The mediation ended without resolution, and discussions are ongoing.

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 has been received with the compatibility assessment outstanding. Downtime is being experienced with old equipment and the availability of spares is becoming a challenge. It is important to note it is a critical requirement to replace aging equipment, and is becoming an increasingly difficult risk to manage.

3.11.3 Baggage Reconciliation Services (BRS)

ACS provides the BRS at ORTIA, 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.

3.11.4 Common Use Terminal Equipment (CUTE) and Common Use Self Service (CUSS)

ACSA has taken over the provision of CUTE and CUSS services since 1 December 2023 with maintenance support provided by SITA.

3.11.5 Fast Travel

AASA supports 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:

- 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.
- 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 at this time.
- Self-boarding: the situation with this project is the same as for Common bag drop as noted above.
- Baggage re-claims: 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 on a limited basis due to the non-renewal of a major contract and can offer this service to the wider community as necessary.

3.12 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 FlySafair, 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 team provided feedback to Members on Aerospace Chamber matters 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 has not met during the period under review due to capacity constraints. 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**
  Matters relating to this Committee are dealt with directly with the Director Civil Aviation.

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.

3.13 54th Annual General Assembly (AGA)

The 54th AASA Annual General Assembly (AGA) was held at the Rheboksskloof Wine Estate in Paarl in the Western Cape from 17 to 20 October 2024. The theme for the 54th AGA was *Unlocking the Potentialities of Aviation*. A total of 230 guests from throughout the world were in attendance.

We sincerely thank and extend our gratitude to our Conference Host FlySafair and the various Event Partners who made it possible to hold such an event. A total of 230 guests from around the world, representing 43 countries, were in attendance.

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 New Delhi, India from 1 to 3 June 2025.

In addition, we recognise the close relationship with the African Airlines Association (AFRAA), our partner association on the African continent. 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.

There is always 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 Aviation Co-ordination Services (ACS).

We recognise and appreciate the close working relationship with BARSA. We work with them on many projects and initiatives impacting the industry. We acknowledge the contribution of Mr. George Mothema, CEO of BARSA, and his team on joint industry positions.

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

Mr. Aaron Munetsi is also a Director on the Board of the Tourism Business Council of South Africa (TBCSA). AASA acknowledges the important relationships with the TBCSA, the 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 & Conferences

News media, online events and social media platforms are key channels AASA uses to advance its advocacy messages to a range of stakeholder audiences, including government policymakers, legislators, regulatory bodies, public health authorities, the business and financial community, as well as industry suppliers and partners.

AASA's views and messaging on behalf of its Members and the industry features in print, online and broadcast media reports are listed on the Media Profile page of the AASA website.

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 May 2022, AASA has participated in many in-person conferences, 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.

6. Regional Issues

AASA has 16 Airline Members of which six 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 what 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 3.2.1*.
- **Environmental Issues**
  South African and regional Airline Members are invited to attend the Environmental Committee meetings. 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, working towards the goal of their inclusion on the Cape Town list.
- **User Charges**
  During the past year, AASA has worked with IATA in user consultations with the Namibia Civil Aviation Authority (NCAA), the Botswana Civil Aviation Authority (BCAA), the Zambia Airports Corporation Limited (ZACL), and the Civil Aviation Authority of Zimbabwe (CAAZ). 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 somewhat been dented but AASA is confident the resilience of the industry will be evident in the coming year and that total recovery will be restored by the end of 2025 or in the first quarter of 2026.

To conclude, on behalf of the AASA team, I wish to acknowledge the leadership and guidance of the Board of Directors and the Executive Committee of AASA who have provided support to the AASA team during the past year. In particular, I wish to thank Professor M. John Lamola (AASA Chairperson), Mr. Rodger Foster, Mr. Elmar Conradie, Ms. Lulu Rababotse, Captain President Qiniso Dhlamini, Dr. Namhla Nshetu, 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 the period under review, and for challenging the AASA team to deal with new issues affecting the industry. We are acutely aware of the dire situation that many of our Members found themselves in as a result of the COVID-19 pandemic, and we wish each and every Member well during this rough road to recovery and growth.

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 2024/2025 and thank them all for the opportunities to engage and cooperate with them on normal agenda items.

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; and Mr. Charles Simelane, our Finance Controller, 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
14 October 2025

List of Members
(as @ 1 October 2025)

Airline Members

Air Austral
Air Botswana
Air Mauritius
Air Zimbabwe
Airlink
Congo Airways
Eswatini Air
Federal Airlines
FlyCobra (Cobra Aviation)
FlySafair
LAM Airlines (Linhas Aéreas de Moçambique)
LIFT Airlines
Moçambique Expresso
Proflight Zambia
South African Airways
TAAG Airlines (Transportadora Aérea AnGolana)

Associate Members

AerCap
ACOC (Air Cargo Operators Committee)
ACSA (Airports Company South Africa)
AEG Fuels (Associated Energy Group)
Airbus
AirlinePros International
Amadeus
ASATA (Association of Southern African Travel Agents)
ASC (Africa Standards & Certifications)
ATR (Avions de Transport Régional)
ATNS (Air Traffic & Navigation Services)
Blake Emergency Services
Boeing
Cape Town Air Access (powered by WESGRO)
Cape Winelands Airport
CFM International
Colossal AviaPartner
De Havilland Aircraft of Canada Limited
Dentons
DPO Pay
Embraer
Engen
Gateway Airport Authority Limited (GAAL)
GE Aerospace
Hahn Air
Hitit
Investec
Kruger Mpumalanga International Airport
Lufthansa Technik
NUCORE
Pratt & Whitney
Puma Energy
Regional One
Rolls-Royce
SAHCO (Skyway Aviation Handling Company)
SAWS (South African Weather Service)
Sasol
Shell Aviation
SITA
South African Tourism
Swissport

Airlines Association of Southern Africa (AASA) NPC
Serving the Collective Interests of the Aviation Industry in the SADC Region

2024 / 2025 AASA Annual Report

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