

s22(1)(a)(ii)

**Subject:** FW: Inquiry Submission package [SEC=OFFICIAL:Sensitive]  
**Attachments:** DITRDCA bilateral air services agreement submission Sept 2023 clean copy.docx; Attachment 4 Bilateral Air Services Discussions.docx; Attachment 3 Consultation List - Bilateral Air Services Arrangements.docx; Attachment 2 growth-potential-foreign-airlines-northern-summer2023-april2023.pdf; Attachment 1 Growth Potential Australian Airlines - Northern Summer 2023.pdf

**Follow Up Flag:** Follow up  
**Flag Status:** Flagged

OFFICIAL:Sensitive

**From:** Wood, Richard <[Richard.Wood@infrastructure.gov.au](mailto:Richard.Wood@infrastructure.gov.au)>  
**Sent:** Monday, 18 September 2023 10:24 AM  
**To:** Solomon, Joseph <[s22\(1\)\(a\)\(ii\)@MO.infrastructure.gov.au](mailto:s22(1)(a)(ii)@MO.infrastructure.gov.au)>; [s22\(1\)\(a\)\(ii\)@MO.infrastructure.gov.au](mailto:s22(1)(a)(ii)@MO.infrastructure.gov.au); [s22\(1\)\(a\)\(ii\)@MO.infrastructure.gov.au](mailto:s22(1)(a)(ii)@MO.infrastructure.gov.au); [s22\(1\)\(a\)\(ii\)@MO.infrastructure.gov.au](mailto:s22(1)(a)(ii)@MO.infrastructure.gov.au)  
**Cc:** PURVIS-SMITH, Marisa <[Marisa.PurvisSmith@infrastructure.gov.au](mailto:Marisa.PurvisSmith@infrastructure.gov.au)>; Wolfe, Jim <[Jim.Wolfe@infrastructure.gov.au](mailto:Jim.Wolfe@infrastructure.gov.au)>  
**Subject:** FW: Inquiry Submission package [SEC=OFFICIAL:Sensitive]

OFFICIAL:Sensitive

Dear Joseph, [s22\(1\)\(a\)\(ii\)@MO.infrastructure.gov.au](mailto:s22(1)(a)(ii)@MO.infrastructure.gov.au)

As you know we have been requested to make a submission to the Senates Select Committee on Commonwealth Bilateral Air Services Agreements ahead of a request to appear at the Committee.

We have prepared the attached submission responds to this request.

The due date for the submission is today, I apologise for the short time to consider this submission before it is lodged late today.

We are of course happy to discuss.

Regards

Richard

**Richard Wood**

First Assistant Secretary • International Aviation, Technology and Services Division

[Richard.Wood@infrastructure.gov.au](mailto:Richard.Wood@infrastructure.gov.au)

P 02 6274 [s22\(1\)\(a\)\(ii\)@MO.infrastructure.gov.au](mailto:s22(1)(a)(ii)@MO.infrastructure.gov.au) • M [s22\(1\)\(a\)\(ii\)@MO.infrastructure.gov.au](mailto:s22(1)(a)(ii)@MO.infrastructure.gov.au)

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**Department of Infrastructure, Transport, Regional Development, Communications and the Arts**  
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<image001.png>

*I would like to acknowledge the traditional custodians of this land on which we meet, work and live.  
 I recognise and respect their continuing connection to the land, waters and communities.  
 I pay my respects to Elders past and present and to all Aboriginal and Torres Strait Islanders.*

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Regional Development, Communications and the Arts**

### Bilateral Air Services Arrangements – Stakeholder Consultation List

Adelaide Airport Limited	Melbourne Airport
Airlines for Australia & New Zealand (A4ANZ)	Newcastle Airport Limited
Airnorth	Northern Territory Airports Pty Ltd
Alliance Airlines	NSW Department of Premier and Cabinet
Attorney-General's Department	Pacific Air Express
Austrade	Perth Airport
Australia Pacific Business Councils	Port Hedland International Airport
Australian Airports Association	Qantas Group
Australian Border Force	QLD Department of Tourism, Innovation and Sport
Australian International Pilots Association	Queensland Airports Limited
Australian Tourism Export Council	South Australian Tourism Commission
Avalon Airport	Sunshine Coast Airport
Board of Airline Representatives of Australia	Sydney Airport Corporation Limited
Brisbane Airport Corporation Pty Ltd	Tasman Cargo Airlines
Broome International Airport	Tasmania Department of State Growth
Cairns Airport Pty Ltd	Tasmanian Chamber of Commerce and Industry
Canberra Airport	Toowoomba Wellcamp Airport
Chamber of Commerce Northern Territory	Tourism & Events Queensland
Civil Aviation Safety Authority	Tourism and Transport Forum
Department of Agriculture and Water Resources	Tourism Australia
Department of Foreign Affairs and Trade	Tourism NT
Department of Home Affairs	Tourism Tasmania
Department of the Prime Minister and Cabinet	Tourism Western Australia
Department of Treasury	VIC Department of Jobs, Skills, Industry and Regions
Destination NSW	Virgin Australia International
Hobart Airport	Visit Victoria
International Air Services Commission	VisitCanberra
Invest Victoria	WSA Co
Launceston Airport	

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# Growth Potential for Foreign Airlines

Published: April 2023

## Existing Bilateral Markets

Markets served by a foreign airline with their own aircraft during the Northern Summer 2023 season

Market	Capacity limit <sup>1</sup>	In use <sup>2</sup>	Available	Growth potential <sup>3</sup>
Brunei	Majors: 23 services	5 services	18 services	360%
	Others: Open	0 services	Unlimited	Unlimited
Canada	9,000 seats	4,186 seats	4,814 seats	115%
Chile	4,000 seats	3,040 seats	960 seats	32%
China	Open	17,042 seats	Unlimited	Unlimited
Fiji	Majors: 7,900 seats	7,900 seats	0 seats	0%
	Others: Open	332 seats	Unlimited	Unlimited
Hong Kong	Majors: 70 services	66 services	4 services	6%
	Others: Open	0 services	Unlimited	Unlimited
India	Open	5,120 seats	Unlimited	Unlimited
Indonesia	Majors: 25,000 seats	12,811 seats	12,189 seats	95%
	Others: Open	0 seats	Unlimited	Unlimited
	ERP <sup>4</sup> : 2,500 seats	0 seats	2,500 seats	-
Japan	Open	4 services	Unlimited	Unlimited
	Haneda: 21 services	21 services	0 services	0%
Malaysia	Majors: 36,500 seats	27,576 seats	8,924 seats	32%
	Others: Open	2,581 seats	Unlimited	Unlimited
Mauritius	Majors: 7 services	2 services	5 services	250%
	Others: Open	0 services	Unlimited	Unlimited
Nauru	Majors: 7 services	3 services	4 services	133%

Market	Capacity limit <sup>1</sup>	In use <sup>2</sup>	Available	Growth potential <sup>3</sup>
	Others: Open	0 services	Unlimited	Unlimited
New Caledonia	2,400 seats	1,422 seats	978 seats	69%
New Zealand	Open	34,434 seats	Unlimited	Unlimited
Papua New Guinea	3,520 seats	2,303 seats	1,217 seats	53%
Philippines	Majors: 10,700 seats	8,892 seats	1,808 seats	20%
	Others: Open	0 seats	Unlimited	Unlimited
Qatar	Majors: 28 services	28 services	0 services	0%
	Others: Open	7 services	Unlimited	Unlimited
	ERP <sup>4</sup> : 7 services	7 services	0 services	0%
Republic of Korea	Majors: 9,500 seats	7,631 seats	1,869 seats	24%
	Others: Open	0 seats	Unlimited	Unlimited
Singapore	Open	48,999 seats	Unlimited	Unlimited
Solomon Islands	Majors: 2,000 seats	576 seats	1,424 seats	247%
	Others: Open	0 seats	Unlimited	Unlimited
Sri Lanka	Majors: 14 services	10 services	4 services	40%
	Others: Open	0 services	Unlimited	Unlimited
Taiwan	Open	6,570 seats	Unlimited	Unlimited
Thailand	Majors: 20,000 seats	9,660 seats	10,340 seats	107%
	Others: Open	0 seats	Unlimited	Unlimited
UAE	Majors: 168 services	91 services	77 services	85%
	Others: Open	0 services	Unlimited	Unlimited
United Kingdom	Open	1,512 seats	Unlimited	Unlimited
United States	Open	13,806 seats	Unlimited	Unlimited
Vanuatu	Majors: 4,000 seats	1,530 seats	2,470 seats	161%
	Others: Open	0 seats	Unlimited	Unlimited
Vietnam	Majors: 42 services	29 services	13 services	45%
	Others: Open	0 services	Unlimited	Unlimited
	ERP <sup>4</sup> : 7 services	0 services	7 services	-

<sup>1</sup>All figures are on an 'each way, each week' basis. Sub-limits may apply in some markets. 'Majors' refers to Australia's major gateway airports of Sydney, Melbourne, Brisbane and Perth.

<sup>2</sup>Capacity utilisation is the maximum figure based on approved timetables as at the start of the Northern Summer 2023 scheduling season.

<sup>3</sup>'Growth potential' is calculated as the ratio of available capacity to capacity in use.

<sup>4</sup>The Enhanced Regional Package (ERP) provides additional capacity in agreed markets (up to a limit) for services that operate via or beyond to a point in Australia other than Sydney, Melbourne, Brisbane and Perth.

## Unserved Markets

Markets without own-operated foreign airline services to Australia during the Northern Summer 2023 season

Market	Capacity limit <sup>1</sup>	Market	Capacity limit <sup>1</sup>
Argentina	2,800 seats	Egypt	Majors: 7 services Others: Open
Austria	Majors: 5,600 seats Others: Open	Ethiopia	7 services
Azerbaijan	Majors: 7 services Others: Open	Finland	2,800 seats
Bahrain	Majors: 7 services Others: Open	France	3 services
Bangladesh	5 services	France (Polynesia)	7 services
Belgium	Majors: 7 services Others: Open	Germany	25 services
Brazil	14 services	Greece	Majors: 7 services Others: Open
Cambodia	Majors: 7 services <sup>2</sup> Others: 7 services	Hungary	Majors: 7 services Others: Open
Colombia	Majors: 7 services Others: Open	Ireland	Majors: 7 services Others: Open
Cook Islands	3,000 seats	Israel	Majors: 7 services Others: Open
Cote d'Ivoire	Majors: 7 services Others: Open	Italy	7 services
Croatia	Majors: 7 services Others: Open	Jordan	Majors: 7 services <sup>2</sup> Others: 7 services
Cyprus	Majors: 14 services Others: Open	Kenya	Majors: 7 services Others: Open
Czech Republic	Majors: 7 services Others: Open	Kiribati	Majors: 7 services Others: Open
Denmark	2,800 seats	Kuwait	Majors: 7 services <sup>2</sup> Others: 7 services

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Market	Capacity limit <sup>1</sup>	Market	Capacity limit <sup>1</sup>
Laos	Majors: 7 services <sup>2</sup> Others: 7 services	Peru	7 services
Lebanon	2 services	Poland	Majors: 2,800 seats Others: Open
Macau	3 services	Russia	2 services
Malta	Majors: 2 services Others: Open	Samoa	2,000 seats
Mexico	Majors: 4 services Others: Open	Saudi Arabia	Majors: 4 services <sup>2</sup> Others: Open
Morocco	Majors: 7 services Others: Open	Serbia	Majors: 7 services Others: Open
Myanmar	Majors: 7 services Others: Open	Seychelles	Majors: 7 services Others: Open
Nepal	Majors: 7 services Others: Open	Spain	Majors: 7 services Others: Open
Netherlands	2,400 seats	South Africa	Majors: 21 services Others: Open
Nigeria	7 services	Sweden	2,800 seats
Niue	500 seats	Switzerland	Open
Norway	2,800 seats	Timor-Leste	21 services
Oman	Majors: 4 services <sup>2</sup> Others: Open	Tonga	Majors: 1,600 seats Others: Open
Pakistan	7 services	Turkey	7 services
Palau	1,200 seats	Zimbabwe	1,600 seats

<sup>1</sup>All figures are on an 'each way, each week' basis. Sub-limits may apply in some markets. 'Majors' refers to Australia's major gateway airports of Sydney, Melbourne, Brisbane and Perth.

<sup>2</sup>The Enhanced Regional Package (ERP) provides additional capacity in agreed markets (up to a limit) for services that operate via or beyond to a point in Australia other than Sydney, Melbourne, Brisbane and Perth.



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Department of Infrastructure, Transport,  
Regional Development, Communications and the Arts

# Growth Potential for Australian Airlines

Published September 2023

## Existing Bilateral Markets

Markets served by an Australian airline during the Northern Summer 2023 season

Market	Capacity limit <sup>1</sup>	In use <sup>2</sup>	Available	Growth potential <sup>3</sup>
Canada	Majors*: 9,000 seats	708 seats	8,292 seats	1171%
	Others: Open	0 services	Unlimited	Unlimited
Chile	4,000 seats	944 seats	3,056 seats	324%
China	Open	2,079 seats	Unlimited	Unlimited
Cook Islands	3,000 seats	1,440 seats	1,560 seats	108%
Fiji	Majors: 6,900 seats	6,899 seats	1 seat	0%
	Others: Open	0 services	Unlimited	Unlimited
Hong Kong	Majors: 70 services	12 services	58 services	483%
	Others: Open	0 seats	Unlimited	Unlimited
India	Majors@: Open	1,785 seats	Unlimited	Unlimited
Indonesia	Majors*: 25,000 seats	24,913 seats	87 seats	0.3%
	Others: Open	7,200 seats	Unlimited	Unlimited
	ERP <sup>4</sup> : 2,500	0 seats	2,500 seats	-
Italy	7 services	3 services	4 services	133%
Japan	Open	21 services	Unlimited	Unlimited
	Haneda: 21 services	21 services	0	0%
New Caledonia	2,400 seats	870 seats	1,530 seats	176%
New Zealand	Open	40,723 seats	Unlimited	Unlimited
Papua New Guinea	3,520 seats	1,044 seats	2,476 seats	237%

Market	Capacity limit <sup>1</sup>	In use <sup>2</sup>	Available	Growth potential <sup>3</sup>
<b>Philippines</b>	Manila & Clark: 10,700 seats Others: Open	2,079 seats 0 seats	8,621 seats Unlimited	415% Unlimited
<b>Samoa</b>	2,000 seats	1,226 seats	774 seats	63%
<b>Singapore</b>	Open	14,566 seats	Unlimited	Unlimited
<b>South Africa</b>	Majors: 21 services Others: Open	7 services 0 services	14 services Unlimited	200% Unlimited
<b>South Korea</b>	9,500 seats	2,231 seats	7,260 seats	326%
<b>Thailand</b>	Majors <sup>#</sup> : 20,000 seats Others: Open	5,429 seats 0 seats	14,571 seats Unlimited	269% Unlimited
<b>Timor-Leste</b>	21 service	7 service	14 services	200%
<b>Tonga</b>	Majors: 1,600 seats Others: Open	348 seats 0 seats	1,252 seats Unlimited	360% Unlimited
<b>United Kingdom</b>	Open	5,047 seats	Unlimited	Unlimited
<b>United States</b>	Open	15,953 seats	Unlimited	Unlimited
<b>Vanuatu</b>	Majors <sup>*</sup> : 4,000 seats Others: Open	880 seats 0 seats	3,120 seats Unlimited	354% Unlimited
<b>Vietnam</b>	Majors: 42 services Others: Open ERP <sup>4</sup> : 7 services	6 services 0 services 0 services	36 services Unlimited 7 services	600% Unlimited -

<sup>1</sup> All figures are on an 'each way, each week' basis. Sub-limits may apply in some markets. 'Majors' refers to Australia's major gateway airports of Sydney, Melbourne, Brisbane and Perth.

<sup>\*</sup> 'Majors' refers to Australia's major airports of Sydney, Melbourne (including Avalon), Brisbane and Perth.

<sup>#</sup> 'Majors' refers to Bangkok, Phuket, Utapao and Chiang Rai

<sup>@</sup> 'Majors;' refer to Mumbai, New Delhi, Kolkata, Chennai, Bangalore and Hyderabad

<sup>2</sup> Capacity utilisation is the maximum figure for September / October based on approved timetables as at 11 September 2023.

<sup>3</sup> 'Growth potential' is calculated as the ratio of available capacity to capacity in use.

<sup>4</sup> The Enhanced Regional Package (ERP) provides additional capacity in agreed markets (up to a limit) for services that operate via or beyond to a point in Australia other than Sydney, Melbourne, Brisbane and Perth.



# Unserved Markets

Markets without Australian airline operated services during the Northern Summer 2023 season

Market	Capacity limit <sup>1</sup>	Market	Capacity limit <sup>1</sup>
Argentina	2,800 seats	France	3 services
Austria	Open	Germany	25 services
Azerbaijan	Majors: 7 services Others: Open	Greece	Majors: 7 services Others: Open
Bahrain	Majors: 12 services Others: Open	Hungary	Majors: 7 services Others: Open
Bangladesh	5 services	Ireland	Majors: 7 services Others: Open
Belgium	Majors*: 7 services Others: Open	Israel	Majors: 7 services Others: Open
Brazil	14 services	Jordan	Majors: 7 services Others: 7 services ERP <sup>2</sup> : 7 services
Brunei	Majors: 27 services Others: Open	Kenya	Majors: 7 services Others: Open
Cambodia	Majors: 7 services Others: 7 services ERP <sup>2</sup> : 7 services	Kiribati	Majors: 7 services Others: Open
Cote d'Ivoire	Majors: 7 services Others: Open	Kuwait	Majors: 7 services Others: 7 services ERP <sup>2</sup> : 7 services
Croatia	7 services	Laos	Majors: 7 services Others: 7 services ERP <sup>2</sup> : 7 services
Cyprus	Larnaka & Pafos: Open	Lebanon	2 services
Czech Republic	Majors: 7 services Others: Open	Macau	3 services
Denmark	2,800 seats	Malaysia	Majors: 42,100 seats Others: Open
Egypt	Majors: 7 services Others: Open	Malta	Majors: 2 services Others: Open
Mauritius	Majors: 7 services	Qatar	Majors: 28 services

Growth Potential for Foreign Airlines

Market	Capacity limit <sup>1</sup>	Market	Capacity limit <sup>1</sup>
	Others: Open		Others: Open ERP <sup>2</sup> : 7 services
<b>Mexico</b>	Majors <sup>#</sup> : 4 services Others: Open	<b>Saudi Arabia</b>	Riyadh & Jeddah: 6 services Dammam: Open
<b>Morocco</b>	Majors <sup>@</sup> : 7 services Others: Open	<b>Serbia</b>	Majors: 7 services Others: Open
<b>Myanmar</b>	Yangon: 7 services Others: Open	<b>Seychelles</b>	Majors: 7 services Others: Open
<b>Nauru</b>	Majors <sup>*</sup> : 7 services Others: Open	<b>Solomon Island</b>	Majors: 2,000 Others: Open
<b>Nepal</b>	Kathmandu: 7 services Others: 28 services	<b>Spain</b>	Madrid & Barcelona: 7 services Others: Open
<b>Netherlands</b>	2,800 seats	<b>Sri Lanka</b>	Majors: 16 services Others: Open
<b>Nigeria</b>	7 services	<b>Sweden</b>	2,800 seats
<b>Niue</b>	500 seats	<b>Switzerland</b>	Open
<b>Norway</b>	2,800 seats	<b>Taiwan</b>	Open
<b>Oman</b>	Majors: 4 services Others: Open ERP <sup>2</sup> : 7 services	<b>Türkiye</b>	Majors: 7 services Others <sup>%</sup> :
<b>Pakistan</b>	4 services	<b>United Arab Emirates</b>	Majors: 168 services Others
<b>Palau</b>	1,200 seats	<b>Timor-Leste</b>	21 services
<b>Peru</b>	7 services	<b>Tonga</b>	Majors: 1,600 seats Others: Open ERP <sup>2</sup> : 7 services
<b>Poland</b>	Majors: 2,800 seats Others: Open	<b>Zimbabwe</b>	1,600 seats

<sup>1</sup>All figures are on an 'each way, each week' basis. Sub-limits may apply in some markets. 'Majors' refers to Australia's major gateway airports of Sydney, Melbourne, Brisbane and Perth.

<sup>\*</sup> 'Majors' refers to Australia's major airports of Sydney, Melbourne (including Avalon), Brisbane and Perth

<sup>#</sup>. 'Majors' refers to Mexico City, Guadalajara, Monterrey and Cancun.

<sup>@</sup> 'Majors' refers to Casablanca, Marrakech, Agadir and Rabat.

<sup>%</sup> 'Others' refers to Samsun Carsmaba, Nevsehir Kapadokya and Gaziantep

<sup>2</sup>The Enhanced Regional Package (ERP) provides additional capacity in agreed markets (up to a limit) for services that operate via or beyond to a point in Australia other than Sydney, Melbourne, Brisbane and Perth.

# 28 September 2023

## Thursday

September 2023						
Mo	Tu	We	Th	Fr	Sa	Su
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4	5	6	7	8	9	10
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25	26	27	28	29	30	

October 2023						
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9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

	THURSDAY
	28
	<div>← From 4 Sep</div> <div>← From 20 Sep</div> <div>← From 27 Sep</div> <div>NISHI - Betts, Jim</div>
	<div>s22(1)(a)(ii)</div> <div>To 3 Nov</div> <div>To 9 Oct</div> <div>To 9 Oct</div>
7 AM	
8	FYI - Public Hearing - Senate Select Committee on Commonwealth Bilateral Air Service Agreements
9	<div>Call: Dave to call Jim</div> <div>Jim to call Dave on mobile; s22(1)(a)(ii) Betts, Jim</div>
10	<div>MS Teams Meeting: Honourable Malcolm Turnbull AC   Secretary Jim Betts and Deputy Secretary David Mackay</div> <div>MS Teams ; Betts, Jim</div> <div>GUESTS for Inland Rail</div> <div>INFO ONLY</div>
11	<div>M3 Inland Rail Secretary Shareholder Meeting [SEC=OFFICIAL:Sensitive]</div> <div>Room - Nishi - 6.020 (VC &amp; Surface Hub) / Teams</div> <div>CIPD Secretariat and Appointments</div>
12 PM	Travel
1	<div>Informal Lunch - Jim Betts I Glyn Davis [SEC=OFFICIAL]</div> <div>Cafe Constitution, National Archives of Australia</div> <div>Davis, Glyn</div>
2	<div>13:30   Secretary Betts   Secretary Davis - National Broadcasters Review [SEC=OFFICIAL]</div> <div>MR-ONC-L4W-Executive Meeting Room; Davis, Glyn</div>
3	<div>Travel</div>
4	<div>MS Teams call: Jamila Rizvi, Future Women &amp; Secretary Jim Betts</div> <div>MS Teams ; Betts, Jim</div>
5	<div>Accountable Authorities Meeting - Secretaries Board [SEC=OFFICIAL:Sensitive]</div> <div>Via Teams</div> <div>Davis, Glyn</div>
6	<div>TRAVEL</div>
	<div>World Maritime Day event</div> <div>National Arboretum - Visitors Centre Building</div>

s22(1)(a)(ii)

**From:** Wolfe, Jim  
**Sent:** Wednesday, 4 October 2023 7:51 PM  
**To:** s22(1)(a)(ii)  
**Cc:** VINCENT, Ben; Wood, Richard; Werner, Stephanie; s22(1)(a)(ii)  
**Subject:** Q and A [SEC=OFFICIAL:Sensitive]

**Follow Up Flag:** Follow up  
**Flag Status:** Completed

OFFICIAL:Sensitive

s22(1)(a)(ii)

You should now have on the system Questions 145-165 and 168.  
Let us know if you need anything else.  
Catch up tomorrow.  
Kind regards  
Jim

**Jim Wolfe**

Assistant Secretary – International Aviation  
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*I would like to acknowledge the traditional custodians of this land on which we meet, work and live.  
I recognise and respect their continuing connection to the land, waters and communities.  
I pay my respects to Elders past and present and to all Aboriginal and Torres Strait Islanders.*

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