

Special Edition:
AUSTRALIA - BRISBANE



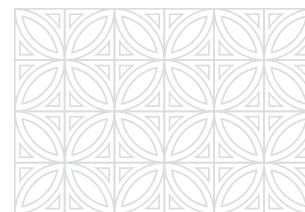
Qatar Airways prevented from competing in the Brisbane market

Qatar Airways' pending request to operate to Brisbane passes 3-year mark.

Qatar Airways seeks access to Brisbane on equal terms to other Gulf Carriers	2
Selective market access	3
Safeguards – What is the international standard?	4
Our contribution to Economic Strength	5
Brisbane Traffic	6
Our continuing commitment to Australia	7
No Borders, Only Horizons	8



QATAR AIRWAYS SEEKS ACCESS TO BRISBANE ON EQUAL TERMS TO OTHER GULF CARRIERS



Since the commencement of services to Australia in 2009, Qatar Airways has carried just over 4 million passengers on its Australia flights; supporting Australia's A\$43 billion international tourism industry. These services help connect Australian exporters to the world via belly-cargo with trade between Australia and the State of Qatar valued at A\$1.057 billion in 2017-18.

The illegal blockade of our country by our neighbours the UAE, Saudi Arabia, Bahrain and Egypt has reinforced the importance of air transport to ensuring food security, with imports of meat and fresh produce from Australia totalling A\$229 million in 2017-18.

Queensland remains the only major Australian State without any services from Qatar Airways.

Queensland exporters miss out:

- Qatar demand for Queensland exports estimated to be worth approximately A\$40 million per annum
- Daily service would add up to 5,000 tonnes of freight capacity to Queensland exporters
- Non-stop direct flights are essential to facilitating this trade with perishable food accounting for 95% of the outbound cargo carried by Qatar Airways.

A\$1.057 billion

Total value of trade between Australia and the State of Qatar in 2017-18.

Source: Department of Foreign Affairs and Trade

A\$229 million

Imports of meat and fresh produce from Australia in 2017-18.

Source: Department of Foreign Affairs and Trade

Key dates

- **25 April 2016** - Qatar Civil Aviation Authority first requests traffic rights for Qatar Airways to operate a daily service to Brisbane
- **05 April 2018** - After almost 2 years of repeated requests, the Australian Government agrees to offer additional 7 frequencies to the main gateways, allowing Qatar Airways to operate to Brisbane.
- **12 April 2018** - Australian Government freezes implementation of additional 7 frequencies, these frequencies remain stalled till this day.

Qatar Airways prevented from competing in the Brisbane market

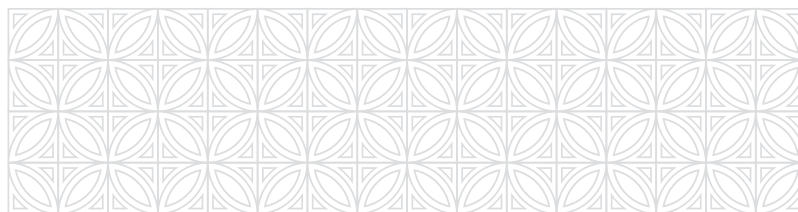
DOH - BNE



Source: Bureau of Infrastructure, Transport and Regional Economics, Year Ending Nov 2018

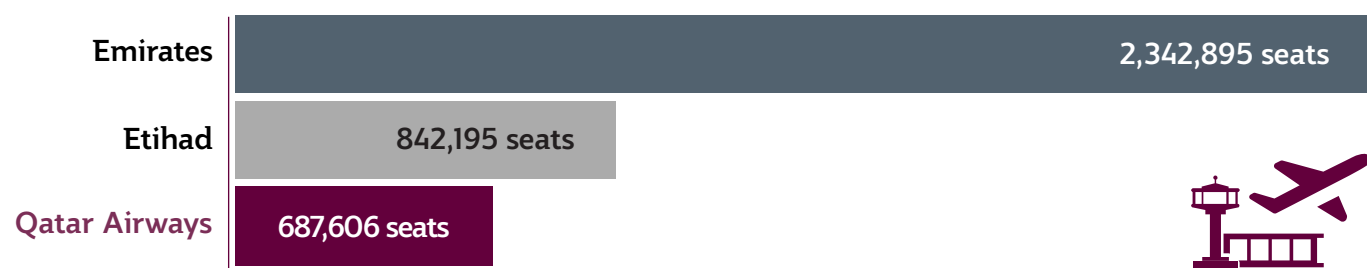


SELECTIVE MARKET ACCESS



Emirates' seat capacity operated to the Australia market is 400% more than Qatar Airways. This imbalance distorts the market, allowing one carrier to develop a dominant position. When market conditions favour one carrier, passengers, and the tourism and trade industry pay the price.

Seat capacity operated to Australia



Source: Bureau of Infrastructure, Transport and Regional Economics, Year Ending Nov 2018

Qatar Airways offers a better service and more destinations to Australian passengers, yet is granted less market access.



* Weekly frequency entitlement to Australia's main gateways

** Destinations (Australia Excluded)

Source: Department of Infrastructure, Regional Development and Cities - Register of Available Capacity Feb 2019

A multiple award-winning airline - Qatar Airways

Best Airline in the Middle East

(2018, 2017, 2015, 2014, 2012, 2011 and 2010)

World's Best Business Class

(2018, 2017, 2016, 2014, 2013 and 2010)

World's Best First Class Airline Lounge

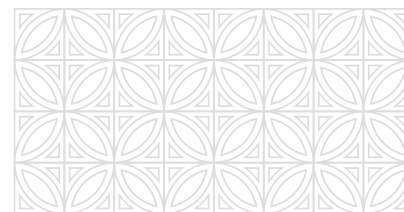
(2018, 2017 and 2011)



Internationally
Recognised
Industry Leader

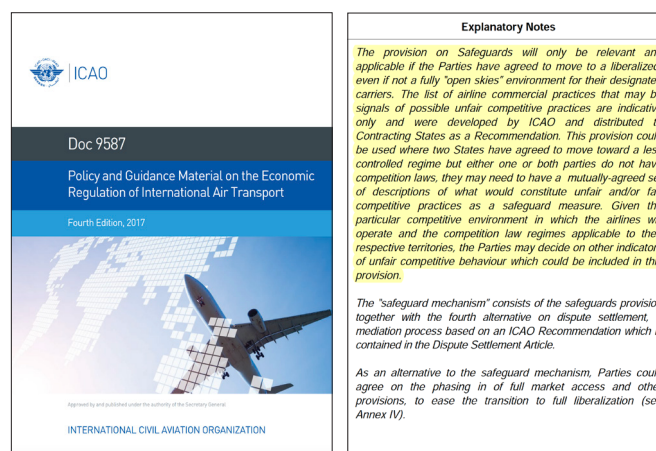


SAFEGUARDS – WHAT IS THE INTERNATIONAL STANDARD?



The Australian Government has stalled the implementation of an agreed additional 7 frequencies to Brisbane subject to Qatar agreeing to include new safeguard provisions related to 'Fair Competition' in the bilateral Air Services Agreement.

According to the International Civil Aviation Organization (ICAO), the United Nations body responsible for setting international standards and recommended practices for International Civil Aviation:



“The provision of Safeguards will only be relevant and applicable if the Parties have agreed to move to a liberalized, even if not a fully ‘open skies’ environment for their designated carriers.”

Doc 9587. Policy and Guidance Material on the Economic Regulation of International Air Transport, 4th Edition, Page 160

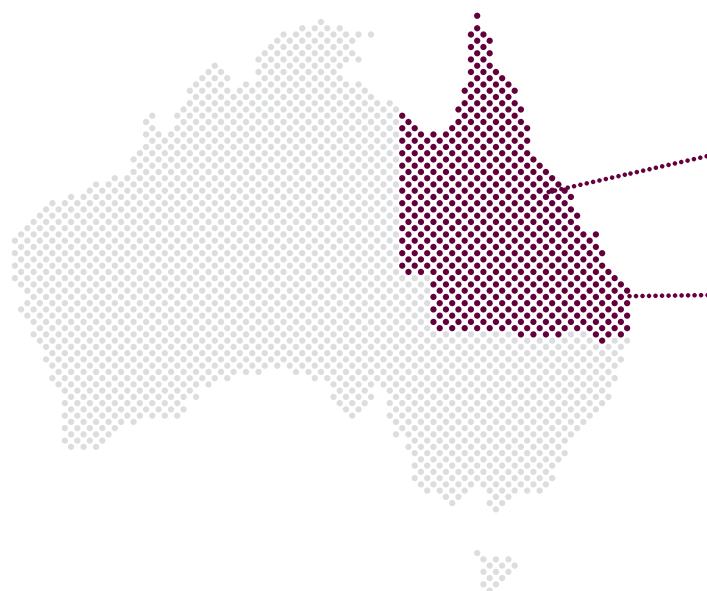
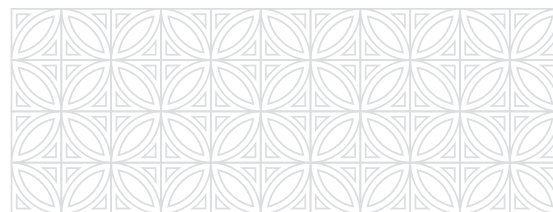


Based on these ICAO guidelines, the Qatar Civil Aviation Authority has advised it is willing to amend the Australia-Qatar Air Services Agreement (ASA). While these discussions are ongoing, we have respectively requested the additional seven frequencies to Brisbane be unfrozen and implemented as agreed in April 2018. This would bring Brisbane into alignment with the other main gateways in Australia.

- The proposal of ‘Safegaurds’ is neither justified by ICAO guidelines nor proportionate to the offer of unfreezing the already agreed additional seven weekly frequencies to Brisbane.
- Qatar is willing to adopt ‘Fair Competition’ provisions, as demonstrated by the recently initialled Comprehensive Air Transport Agreement (CATA) between the European Union (EU) and Qatar.
- The EU-Qatar CATA, as per ICAO guidelines, will offer an ‘open skies’ environment to the designated carriers of Qatar and the EU.
- The EU-Qatar CATA is the first of its kind between the EU and a Gulf Cooperation Council Member State. It should be noted that the UAE, home to Emirates and Etihad, has refused to enter into talks with the EU.
- Is the UAE being asked to adopt ‘Safeguards’ provisions, or only Qatar?
- Is imposing ‘Safegaurds’ only on Qatar appropriate and proportionate given the UAE is currently entitled to 154 weekly frequencies to the main gateways compared to Qatar’s current entitlement of 21 weekly frequencies to the main gateways?



OUR CONTRIBUTION TO ECONOMIC STRENGTH



Opportunity for Queensland Exporters

81,600 tonnes
of goods airfreighted from Brisbane in 2018*

12 - 15 tonnes
Cargo per flight



95%
Fresh perishable food

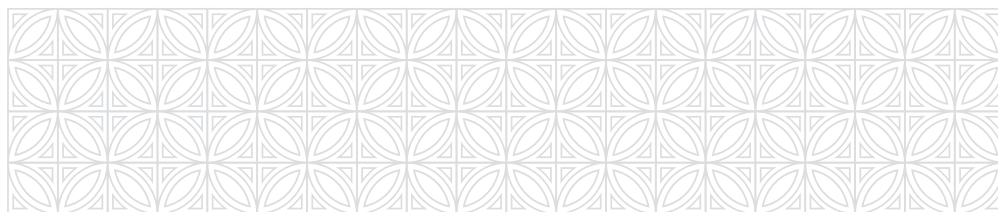


** Source: Bureau of Infrastructure, Transport and Regional Economics, Year Ending Nov 2018*

- Qatar Airways expects to carry outbound cargo of approximately 12-15 tonnes per flight.
- 95% of the outbound cargo from Brisbane will be fresh perishable food similar to the rest of Australia.
- Australian perishables average approximately A\$10 per kilogram. As a result we estimate Australian perishables to be worth over A\$40 million per annum.
- Only 400 tonnes to/from Qatar, but significant potential for growth with direct flights.
- As Qantas, Emirates and Etihad do not operate to Doha, Qatar Airways is the only air cargo supplier to the Qatar – Australia market.
- New passenger services to Brisbane, will create new business for Queensland exporters to fulfil Qatari demand for Australian products.



BRISBANE TRAFFIC



Brisbane
passengers
to Gulf



629,000

Freight (tonnes)
between
Brisbane and Gulf



15,500

- Brisbane ranks 4th in both passenger and freight traffic to the Gulf, despite being the third largest city in Australia by population.*
- In comparison, passenger traffic between Brisbane and the Gulf totalled 629,000 people with freight in tonnes of 15,500 tonnes.*
- Queensland passengers using Qatar Airways from other States has increased from 27K to 45K passengers over the last 12 months.*
- Brisbane Airport is experiencing strong international passenger growth of 5.2% on international seat capacity growth of 5.8%
(Brisbane Airport Corporation Annual Report 2018).
- Capacity to double with opening of new parallel runway in mid-2020.

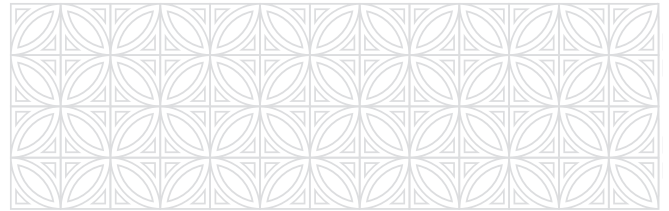
* Source: Bureau of Infrastructure, Transport and Regional Economics, Year Ending June 2018

DOHA - BRISBANE

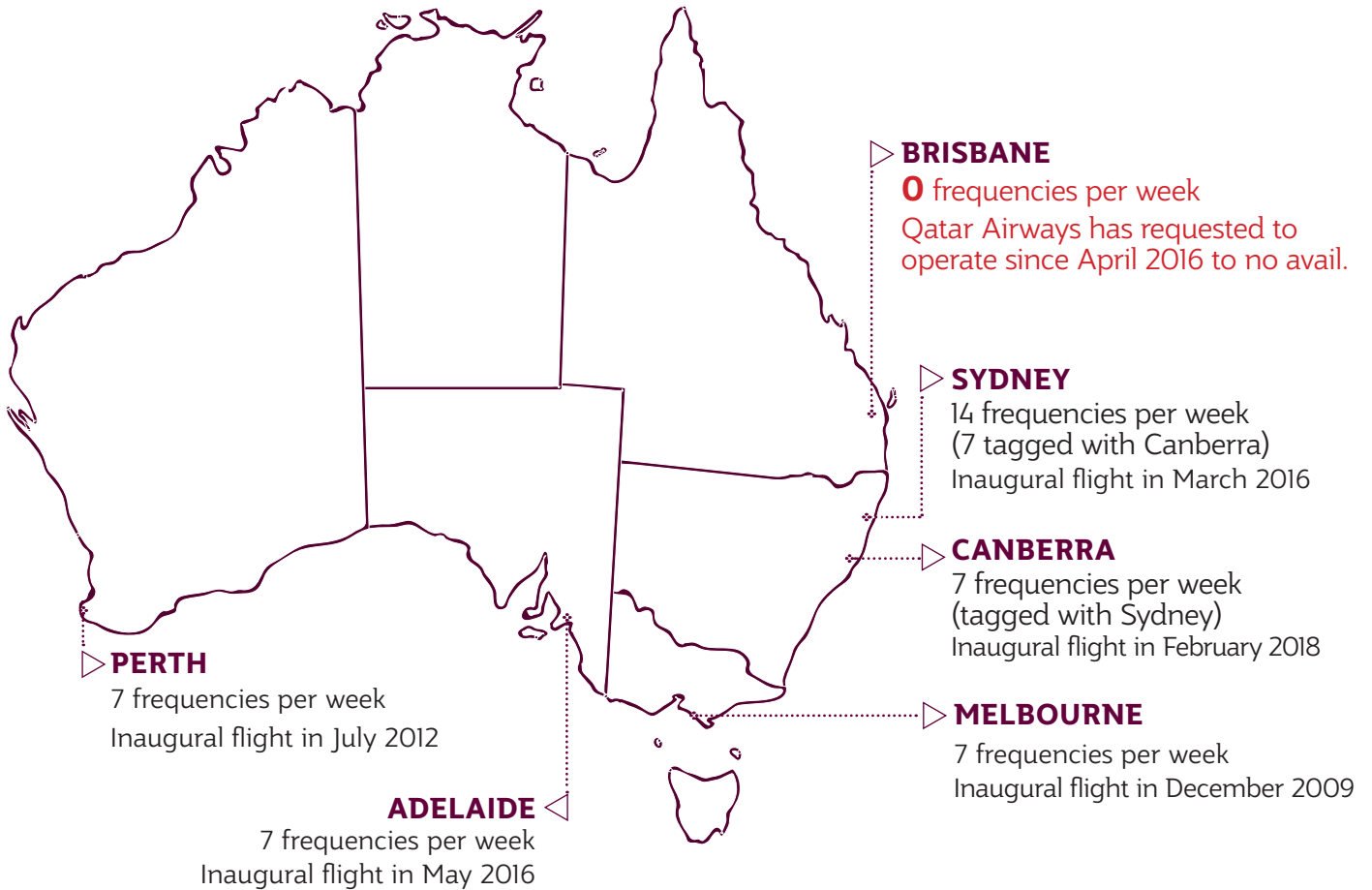
- Qatar Airways analysis estimates a potential of up to **50,000 visitors** per annum for a daily Doha to Brisbane operation.
- **No competition with Australian carriers** on the routes relevant to Qatar Airways to/from Brisbane.
- **Emirates currently operates triple daily** services to Brisbane.
- Etihad currently operates daily service to Brisbane.
- **Qatar Airways restricted** from competing on routes to/from Brisbane.



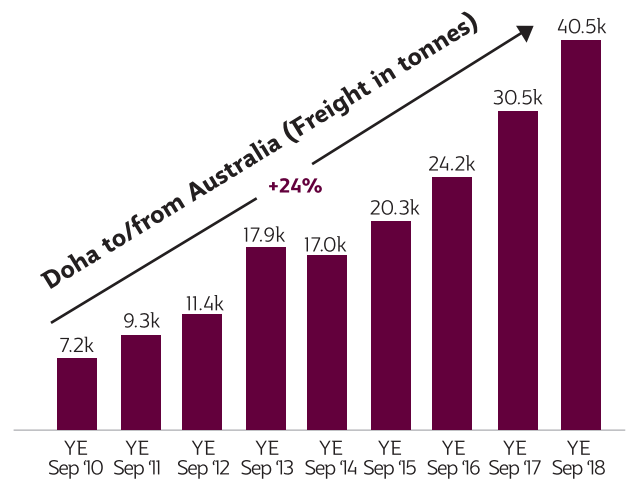
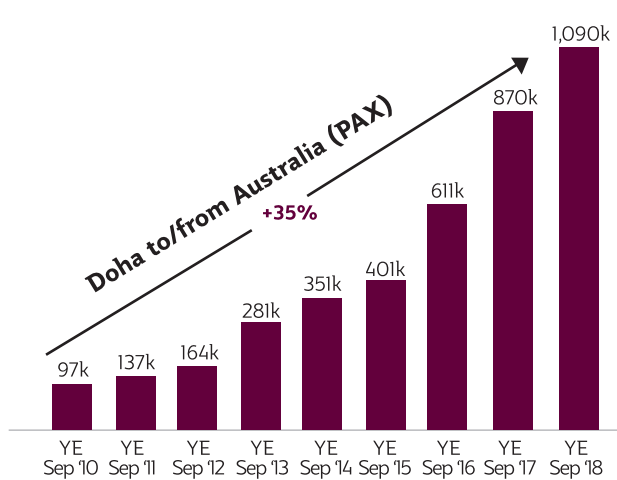
OUR CONTINUING COMMITMENT TO AUSTRALIA



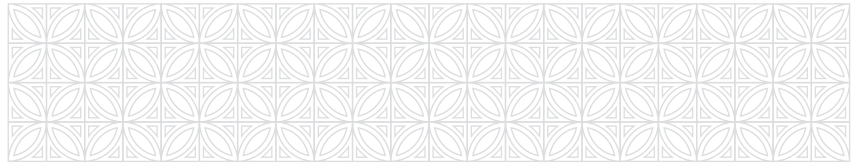
Qatar Airways currently operates 35 frequencies per week to Australia.



Provided the opportunity, Qatar Airways has been gradually growing the Passenger and Freight market to and from Australia.



NO BORDERS, ONLY HORIZONS



On 5 June 2017, Qatar Airways ceased being just a commercial airline and overnight became the only humanitarian bridge connecting the State of Qatar to the world.

Qatar's only land bridge and lifeline was shut down without warning leaving **approximately 3.2 million residents, including over 5,500 Australian expatriates**, without access to new shipments of food, medicines, and other critical supplies. Qatar Airways quickly mobilized to provide the humanitarian care required of its international residents while continuing to deliver our five-star customer service, for which we are renowned.

“

As an airline, we do not believe in boundaries. We believe in bringing people together. The world is better that way.

We believe it is a right of all of us to go where we need to go, to feel the things we want to feel, to see the people we want to see.

That is why we will continue to fly the skies, providing our passengers with everything we can and treating everyone how they deserve to be treated.

We do this because we know that travel goes beyond borders and prejudice...

That travel teaches compassion.

That travel is a necessity.

That travel is a right for all.

There should be no borders in the sky, only horizons.

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No part of this document may be disclosed in any manner to a third party without the prior written consent of Qatar Airways. All information within is correct at the time of publication.

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