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Air Power

Assessing the Need for an Increased Sovereign Commercial Airlift Capability

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A significant increase in commercial airlift resources—beyond the available Royal Australian Air Force Air Mobility and Australian Civil Aviation capabilities—is required to support Australia's national interest during periods of national crises and major conflict requiring time-sensitive mobilisation. In order to succeed in an increasingly contested environment, it is essential that the Australian Defence Force (ADF) draws upon all components of national power and integrates these with military power. The ADF must develop sovereign capabilities that enable and sustain ADF military capability. This paper analyses the United States' and China's commercial strategic airlift reserves, which are used to achieve national strategic and defence priorities. This paper recommends integrating Australia's domestic commercial airlift capabilities, which would support realising Australia's national strategic objectives.

Introduction

A sovereign capability is by its nature a critical resource for the ongoing continuance of Australian life, that foreign sources do not provide the necessary assurances or security. Logistics is the bridge between our national economy and the actual operations of our combat forces in the field (Eccles, 1959, p. 10). The Australian Defence Force (ADF) relies upon a range of contracted logistics support providers to sustain force generation activities within the network of ADF establishments and bases in Australia. Australia has a small fleet of national carriers that support Australia's domestic and external air links. The ADF relies upon this air transportation network for time-sensitive logistics support to sustain force generation activities within Australia. The Royal Australian Air Force (RAAF) Air Mobility Group achieves a range of specified tasks as directed in contingency plans in support of Australia's Defence Strategic objectives, which include deploying combat forces and extending the bridge from our national support base to combat forces in the field. In the event of Humanitarian Assistance/Disaster Relief (HADR) or major conflict requiring national mobilisation, an increase in logistics support will be required to sustain combat forces, both within Australia and Australia's near region, which exceeds the ADF's organic logistics capability. In order to maintain the bridge between the national economy and combat forces, there is opportunity for the ADF to integrate commercial airlift capability in the achievement of these contingency scenarios.

A sovereign commercial airlift capability guarantees the ongoing continuance of Australian life through the sustainment of ADF force generation activities within Australia, and the achievement of an increased national commercial airlift capability, which may be drawn upon in the event of mobilisation. While Part VI Sections 67 and 68 of the *Defence Act 1903* (Cth) currently enables the appropriation of transportation assets within Australia for the purposes of Defence use, alternative strategies to encourage the expansion of domestic civil aviation capability are required. Analysis of the United States (US) and China's sovereign commercial strategic airlift reserve capability will be made. Development of a civil strategic airlift scheme for use during peacetime, which can be drawn upon in times of emergency, is an emerging priority in the event of major conflict.

Australia's Aviation Capability

The Australian civil passenger and cargo aviation sector comprises only a small number of national carriers.[1] Excluding turboprop aircraft operators, the number of Australian owned and registered commercial passenger aircraft with medium lift capability are limited, comprising Airnorth, Alliance Airlines, Bonza, Jetstar, Qantas, QantasLink, Rex, Virgin, Virgin Australia Holdings, Network Aviation, and Skytraders (Civil Aviation Safety Authority, 2023). In addition, there are only six Australian owned and registered cargo carriers able to sustain external supply chain links to Australia (Civil Aviation Safety Authority,

1 See Appendix 1 for a list of national carriers with medium civil lift capability, comprising a total of 679 aircraft. Source: Civil Aviation Safety Authority Air Operators. https://www.casa.gov.au/search-centre/air-operators?search

2023). In addition to passenger transport services, Australia relies on the inbound and outbound air transportation of goods and services on a daily basis, which include agricultural and seafood products to sustain Australian industry, but also life-saving and time-critical medical supplies that sustain Australia's daily routines. The Australian nation relies upon air transportation for cargo that is high-value, time-sensitive and perishable. Although making up only 0.1% of freight by volume, air freight represents 21% of the total value of international trade (Calfas et al., 2018, p. 3).

For the same reasons of high-value, time-sensitive and perishable cargo, the ADF relies upon strategic airlift for the air transportation of passengers and materiel to and from a theatre of operations, which may be within or external to Australia. The requirement to institute the International Freight Assistance Mechanism (IFAM) in order to maintain Australia's global air links during the COVID pandemic (both outbound and inbound) reinforces Australia's current reliance on global supply chains for our economic and national survival. The reliance on foreign-registered airlines for these global air links, which are not assured at our most vulnerable times, demonstrates a critical deficiency in Australia's security.

The RAAF has arguably the world's most highly advanced Air Mobility fleet, in order to project force globally to meet Australia's Strategy of National Defence. The RAAF's Air Mobility Group (AMG) is responsible for force generating the ADF's air mobility capability, achieved through a range of platforms. The RAAF AMG fleet comprises the following: 8 x C17 Globemasters; 12 x C-130J Hercules; 10 x C-27J Spartans; 7 x KC-30A Multi-role Tanker Transports; 2 x Boeing Business Jets; 12 x KA350 King Airs; and 3 x Dassault Falcons (Royal Australian Air Force, n.d.). The ADF's organic air mobility fleet is not structured to operate the range and vastness of Australia's national civil external air links, humanitarian assistance or mobilisation requirements, in addition to satisfying defence strategic objectives. For operations in the Middle East and our near region, the ADF has utilised commercial airlift in steady state operations to satisfy the ADF's strategic lift requirements, enabling prioritisation of military lift to perform a multitude of higher-priority defence tasking. Commercial airlift supplementation has been incorporated into ADF activities by performing a range of administrative, exercise and non-combat-related airlift activities, enabling greater effect for organic military airlift.

Access to military airlift from foreign military partners (e.g. India and France) is governed by mutual logistics support arrangements (MLSA) or international agreements (Australian Dept of Defence, 2018, 2020). These agreements are established bilaterally between Australia and other allied nations to enable cooperative and reciprocal military logistics support. In order for the ADF to be allocated military airlift from another nation's organic military capability, the ADF is in direct competition with the host nation's own internal priorities. As an example, the US Department of Defense (US-DOD) transportation movement priority system assigns foreign force support below operational and contingency tasking (Joint Chiefs of Staff, 2020). The consequence of this priority allocation system is that US military airlift assets cannot be assured for the ADF in time of need. In times of national emergency or mobilisation, the likelihood of Australia being able to source a foreign nation's commercial or military airlift in support of Defence tasking may be restricted, or prioritised by competing host-nation priorities. As commercial airlift is a significant force enabler in the projection of military capability, the ADF's ability to project force will be significantly diminished if there isn't sufficient sovereign domestic commercial aviation capability to draw upon in times of major conflict.

Achievement of an ADF strategy of denial in Australia's northern approaches relies upon the integrated force to successfully implement a joint expeditionary theatre logistics system with strategic depth and mobility. Para 8.62 of the DSR states: 'Theatre-level logistics must enable capability generation and support from Australia's southern regions to the network of northern bases, with sufficient capacity to service force-flow, as well as providing requisite storage and distribution means. This requires a robust national road, rail, maritime and air distribution system' (Australian Dept of Defence, 2023). The achievement of a robust air distribution system is dependent upon a sizeable, capable and scaleable civil aviation fleet.

US Civil Reserve Air Fleet

The Civil Reserve Air Fleet (CRAF) is managed by the US Department of Transportation (US-DOT), which provides additional emergency airlift capability to the US-DOD, and federal government agencies more broadly, during contingency scenarios where the airlift requirements are not satisfied through organic military airlift (US Dept of Transportation, 1951). In 1951, President Truman issued Executive Order 10219, which directed the US-DOD and the Department of Commerce to jointly develop a plan to utilise aircraft registered under the US Federal Aviation Administration (FAA) in times of crisis (Cracknel, 1988). As one of the goals of the CRAF scheme was to maintain a viable US commercial airline industry, only US-registered civil transport aircraft are permitted to participate in CRAF. This plan was in response to a realisation the US could not afford to maintain an organic military airlift fleet in peacetime large enough to meet all wartime airlift requirements. **Figure 1** shows an example where a civilian cargo plane (Kalitta Air) at Dover Air Force Base supported a US-DOD mission (Cacicia, 2017).

The US-DOD relies upon commercial augmentation to support achievement of its national defense strategy. With an organic military fleet of over 400 aircraft and a workforce of 36,000 across ten bases, the US Air Mobility enterprise is dependent upon civil augmentation, achieved through CRAF, to meet its global mobility priorities (Air Mobility Command, 2023). There are three stages of activation for the CRAF: (1) minor regional crises and HADR; (2) major theatre war; and (3) national mobilisation. The CRAF has been activated three times since inception in 1952: (1) to support Operation Desert Shield and Desert Storm in

Figure 1. Cargo pallets are loaded onto a Kalitta Air Boeing 747 by 436th Aerial Port Squadron Airmen March 24, 2017, at Dover Air Force Base, Delaware, US (Cacicia, 2017).

1990-1991; (2) in support of Operation Iraqi Freedom from February 2002 to June 2003; and (3) in support of the Afghanistan Evacuation in 2021 (US Dept of Defense, 2021).

Carriers are incentivised to commit to the stages of activation as it entitles them to more peacetime business. The scheme not only achieves military airlift objectives during peacetime and war, but also underwrites the ongoing financial viability of the commercial aviation industry during peacetime. Most recently, in August 2021, the US Secretary of Defense activated Stage 1 of CRAF for 18 aircraft for onward movement of passengers to intermediate staging bases as part of the Afghanistan evacuation (US Dept of Defense, 2021). This activation demonstrates the critical reliance on commercial airlift to achieve the United States' national strategic objectives during periods of emergency. The current scheme, as issued by President Reagan in 1987, 'emphasises the need to maintain viable organic and civil airlift fleets that work together in peacetime and in wartime' (Gourdin, 1983).

Under the US CRAF scheme, there is a significant proportion of civil aircraft available to supplement US organic military airlift capability to enable committed expansion or to be utilised in times of emergency. As of September 2022, there are 25 carriers and 450 aircraft enrolled in CRAF (Air Mobility Command, 2023). Carriers must be able to provide a minimum of 40% of their nominated CRAF passenger fleet available for usage by the US-DOD at all times (Air Mobility Command, 2023). In comparison, the total domestic and international US fleet inventory availability is 7695 aircraft (US Dept of Transportation, 2021). These 450 CRAF aircraft represent only 5% of the entire US civil aircraft inventory. In contrast, the RAAF AMG fleet has 52 organic military aircraft available, and there is a medium to large Australian civil aircraft fleet inventory of 679 aircraft (Civil Aviation Safety Authority, 2023). Developing a similar Australian civil reserve fleet would enable rapid activation of civil aircraft to supplement the ADF in achievement of defence objectives.

China's Strategic Projection Support Force

China has significant civilian strategic airlift capability and is rapidly growing its military airlift capabilities to support its expanding national interests. The People's Liberation Army (PLA) Air Force (PLAAF) strategic lift capability consists of 25 Y-20 strategic lift aircraft, 20 IL-76 military lift aircraft as well as minimal Y-8 and Y-9 tactical airlift aircraft (Garafola, 2017). While the estimates vary widely, it is conservatively expected that the PLAAF Y-20 aircraft fleet will grow by a further 50 aircraft by 2025, with a likely Y-20 fleet of between 100-125 aircraft by 2030 (Fisher & Hardy, 2014). The relatively recent rapid growth in military lift is aimed to accelerate achievement of China's three-phased priorities of: (1) being able to fight an information war in the near maritime domain; (2) projecting power in regions along the Belt and Road initiative; and (3) enable global projection in the long term (Kennedy, 2019). A nation's strategic airlift capability must be commensurate with achieving its military objectives. Without a civil air fleet to draw upon while China is growing its military airlift capability, the PLA would be constrained in achieving these military objectives.

Although the PLAAF possesses a relatively modest, but growing, military airlift capability in recognition of its military size and global aspirations, China is able to draw upon a sizeable national civilian airline fleet. Through progressive reform in the aviation industry, China has established an open market economy with state-owned enterprises, 'allowing airlines to function as business enterprises while the government preserves its controlling interest' (Chen et al., 2017). Although a relaxation of aviation law allowed the introduction of private carriers in 2004, the dominant market players continue to be State Owned Enterprises (SOE). China's 2016 National Defense Transportation Law regulates the construction, management and use of transportation services for the PLA in support of national defence (Peoples Republic of China, 2023). A civil aviation reserve fleet has been established, known as the 'strategic projection air support fleet' (SPASF) and is administered (including funding) under the National Transportation War Readiness Office (Kennedy, 2019). It is not known whether the management of strategic projection support forces is under the command of PLA Theatre Commands or the newly established PLA Joint Logistics Support Force (JLSF) (Kennedy, 2019). The first Strategic Projection Air Support Fleet (SPASF) was commissioned in 2013, with China Southern Airlines (McCauley, 2022). China has subsequently increased its civil SPASF, which now includes 15 selected Chinese registered airlines. As of 2019, the number of aircraft that meet the PLA specifications for entry under the SPASF totalled 3192 passenger aircraft and 143 cargo aircraft (McCauley, 2022).

The PLA's SPASF has successfully enabled operational projection of military forces to fulfil China's priorities, specifically to project power in regions along the Belt and Road Initiative, and to enable global projection. The PLA has utilised the SPASF in a range of military scenarios in conjunction with its organic military lift capabilities. China

Postal Airlines, a Strategic Support Cargo 'Dadui' (Brigade), with 33 cargo aircraft, supported a 'PLAAF strategic combat readiness exercises in September 2017' (Peltier et al., 2020).

Applying Commercial Strategic Lift to the Australian Context

The ADF has the opportunity to integrate civil aviation to enable achievement of Australia's National Defence Strategy through supporting specific contingency scenarios. Similar to the US CRAF system, a civil aviation fleet could be developed and tailored to support the roles of: (1) HADR; (2) Major theatre war (committed expansion); and (3) National mobilisation.

Climate change will increase the required humanitarian assistance and disaster relief tasks at home and abroad. As noted in the Defence Strategic Review (Australian Dept of Defence, 2023), Defence is not structured or equipped to act as a domestic disaster recovery agency and should be a force of last resort. The use of a civil airlift fleet, to be activated in support of HADR tasking, will enable the rapid achievement of HADR airlift tasking and free the ADF to remain focused on core activities to achieve Australia's National Defence Strategy. The activation of 18 civil aircraft under US-DOT CRAF Stage 1, to enable onward movement of passengers from interim staging bases as part of humanitarian assistance operations, demonstrates the utility of integrating civil airlift to achieve humanitarian operations.

The Australian civil airline capability is structured to support national domestic and regional passenger and cargo movement, and so has limited means to support long-range global movement. **Figure 2** shows the number of medium to large registered civil air operators in Australia, and their passenger seat capacity (Civil Aviation Safety Authority, 2023). Major theatre war and national mobilisation requiring committed expansion will demand an increased airlift capacity that is in excess of the organic ADF military airlift available. In the event of major conflict or mobilisation, a robust national air distribution system is required to support an expanded theatre-level logistics network within Australia and its near region. A civil reserve air fleet, with an agreed expansion capability to support ADF objectives, will be able to rapidly scale up to support the ADF to meet this mobilisation need.

The Australian civil aviation industry comprises approximately 679 aircraft with short (less than 4000 km), medium (4000-7000 km), and long-range (greater than 10,000 km) capability (see Appendix 1). Analysis of these aircraft categories indicates there are sufficient passenger seats available over a range of less than 3000 km (approximately 22,000), 63,000 passenger seats over 4000-7000 km range, and only 18,000 passenger seats available for ranges greater than 7000 km. **Figure 3.a** shows the distribution of passenger seats by range available in the domestic aviation industry.

Figure 3 indicates there are sufficient domestic aviation resources to support short- and medium-range passenger transport, where excess capacity exists in the civil aviation industry, but insufficient domestic aviation capacity to support extended, global reach requirements. Australia's entire long-range (in excess of 7000 km) civil passenger fleet is 43 aircraft, comprising 18,000 passenger seats. Australia has a large expatriate population, with a diaspora of approximately 1,000,000 people living in geographically remote locations throughout the world (Australian Dept of Foreign Affairs and Trade, 2023). For example, Turkey has an Australian population of 12,000, while Hong Kong has 90,000, Taiwan has 7000 and the US has over 90,000. Given only a small proportion of Australia's existing 43 long-range civil aircraft could be made available, Australia would be challenged to support a rapid contingency scenario of significant scale, and at extended range, that required sovereign commercial aircraft support to conduct onward movement of Australian nationals. While medium-range transport can be used (with refuelling) towards Asia and Europe, rapid transpacific repatriation will be extremely challenging as shown in **Figure 3.b**.

The Australian civil aviation sector has a small number of dedicated cargo aircraft designed to support domestic, intra-state cargo distribution. There are five Australian airlines that operate 26 dedicated cargo aircraft: Express Freighters, Pionair, Tasman Cargo, Toll Aviation, and National Jet. Although not possessing any physical assets, Qantas Freight uses a number of subsidiaries for cargo operations, which includes a wet lease (an airline provides an aircraft, complete crew, maintenance, and insurance (ACMI) to another airline) of two B747 freighter aircraft. Of the commercial cargo aircraft available, there are only three extended-range (greater than 7,000 km) aircraft in the Australian inventory, excluding wet-leased aircraft not Australian owned or aircraft on order yet to be delivered. There is limited cargo capacity available in Australia's domestic aviation market.

There is limited civil air cargo carrying capacity available for committed expansion in the event of major conflict or national mobilisation. The ADF needs a robust and scaleable air distribution system able to scale to support contingency scenarios. In the event of humanitarian assistance, major conflict or national mobilisation, an increase in commercial cargo airlift capacity in excess of ADF military airlift may be required. As only a small proportion of Australia's 26 dedicated aircraft could be made available, and with only three extended-range aircraft available, the Australian civil aviation industry would be challenged to support cargo movement of any scale in support of ADF contingency scenarios.

At present, the ADF has a limited commercial airlift requirement for industry to satisfy, commensurate with its military strategic objectives. In the financial year 2022-2023, in excess of AU$130 million in commercial airlift was contracted by the ADF through 13 suppliers (Sharma, 2020), and in excess of AU$200 million of air transport charters with the inclusion of other Federal Government agencies (Australian Dept of Defence, 2023). The current contractual arrangements do not require the use of Australian carriers, and therefore do not incentivise the development of a sovereign Australian aviation capability. In contrast, in 2019, the US-DOD awarded in excess of US$729 million (US Dept of Defence, 2019) in task orders to US car-

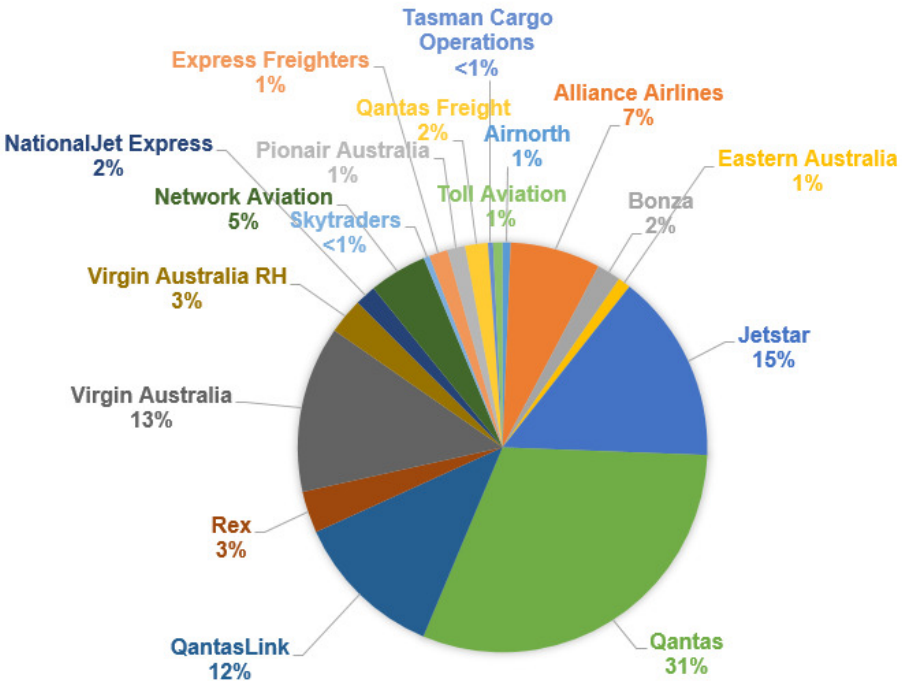

Figure 2. Passenger Seat capacity of Medium to Large Civil Air Operators registered in Australia. Raw data available in Appendix 1 (Civil Aviation Safety Authority, 2023).

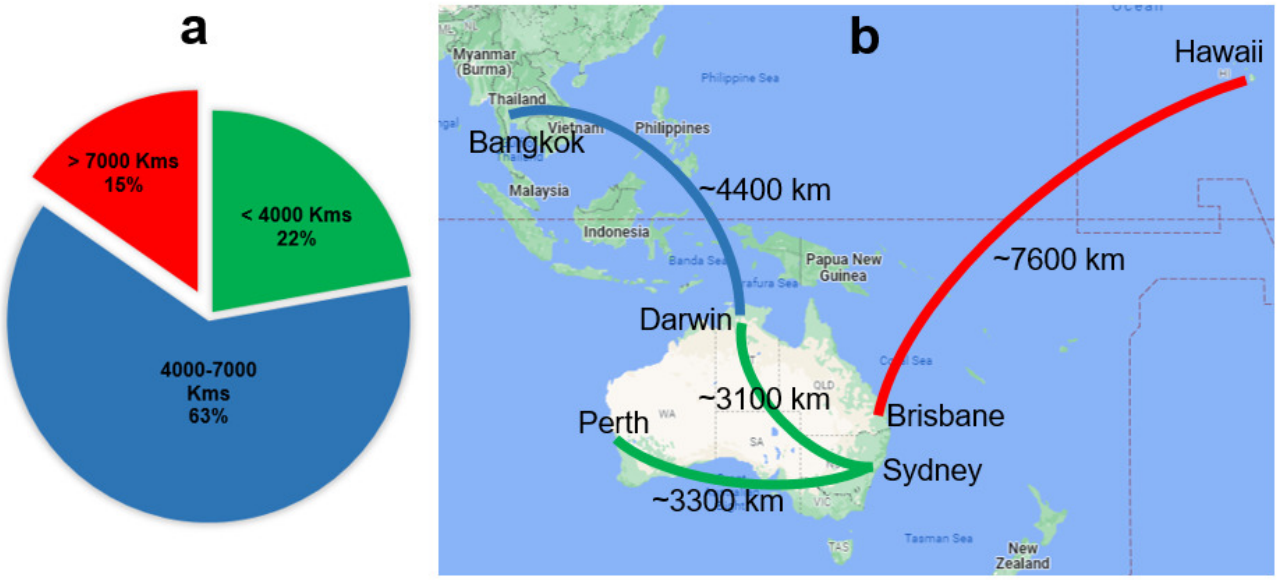

Figure 3. (a) Distribution of passenger seats by range in the Australian aviation industry. (b) Relative distances from Australian major airports (Map Data © 2023 Google).

riers under the US-DOT CRAF scheme. Although there is a significant difference in these governments' charter lift requirements for industry to satisfy, development of a contractual mechanism that targets the sustainment of the Australian aviation industry may increase Australia's commercial aviation capacity, which could be drawn upon in time of mobilisation or crises. Understanding the likely increased commercial airlift requirement for the ADF during periods of mobilisation would provide useful signalling to the Australian aviation industry to enable expansion.

The contractual mechanism to enable development of an increased sovereign aviation capability requires compliance with Commonwealth Procurement Rules. The US-DOT-managed CRAF scheme is activated for Defense under the *Defense Production Act 1950* (U.S.C), and enacted through contractual agreements with Air Carriers and the US Transportation Command. Current arrangements within

Defence utilise a *standing offer*, which is available to be accessed by other Government departments. A similar Standing Offer arrangement, with prioritisation of Australian Air carriers could be utilised, with an underlying contractual agreement between Defence and these Australian Air carriers. Similar to China, Australia has the capacity to appropriate transportation assets for Defence use, which could be used in times of mobilisation. However, this mechanism will not achieve an expansion of future commercial airlift capability. A voluntary opt-in scheme for Australian registered carriers may provide comparatively greater flexibility, which is similar to the US-DOT CRAF scheme.

Conclusion

Aviation is an essential facilitator of business activities in Australia, underpinning international trade and ensuring the strength of Australia's economy. A sovereign commercial aviation industry sustains military force generation activities in Australia, and supports the achievement of defence strategic objectives. The development of the US CRAF scheme has strengthened the symbiotic relationship between the commercial aviation sector and the US-DOD in the achievement of National Security Objectives. The output of this contractual relationship is that a self-sustaining commercial aviation industry has been maintained in the US, which is capable of providing a rapid response in support of national interests.

For the ADF to achieve its mission in an increasingly contested environment, it is essential that the ADF draws upon all components of national power and integrates these with military power. Commercial aviation expands the ADF's global reach and responsiveness, providing critical transportation capacity to support contingency scenarios. In order to develop a civil airlift capability that is able to be drawn upon in event of contingency, quantification of the capacity and extent to which industry can support this proposal is required.

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Supplementary Materials

Australian national carriers with lift capability

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