

从空管视角看中国低成本航空发展

Development of LCCs in China from the Perspective of ATM

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我国航空运输发展现状

Current Situation of Air Transport in China

- ❖ 中国是世界上人口最多的发展中国家，拥有需求旺盛的航空运输市场。
China is the most populous country in the world with a high demand for air transport.
- ❖ 国发2012-24号文件<<国务院关于促进民航业发展的若干意见>>发布。
Countryfile No.2012-24 <<Some Opinions on Promoting the Development of Civil Aviation>> had been released by State Council of China.



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《国务院关于促进民航业发展的若干意见》

国发[2012]24号

各省、自治区、直辖市人民政府，国务院各部委、各直属机构：
民航业是我国经济社会发展重要的战略产业。改革开放以来，我国民航业快速发展，行业规模不断扩大，服务能力逐步提升，安全水平显著提高，为我国改革开放和社会主义现代化建设作出了突出贡献。但当前民航业发展中不平衡、不协调的问题仍较为突出，空域资源配置不合理、基础设施发展较慢、专业人才不足、企业竞争力不强、管理体制有待理顺等制约了民航业的可持续发展。为促进民航业健康发展，现提出以下意见：

一、总体要求
(一)指导思想。(二)基本原则。(三)发展目标。

二、主要任务
(四)加强机场规划和建设。(五)科学规划安排国内航线网络。(六)大力发展通用航空。(七)努力增强国际航空竞争力。(八)持续提升运输服务质量。(九)着力提高航空安全水平。(十)加快建

设现代空管系统。(十一)切实打造绿色低碳航空。(十二)积极支持国产民机制造。(十三)大力推动航空经济发展。

三、政策措施
(十四)加强立法和规划。(十五)加大空域管理改革力度。(十六)完善管理体制机制。(十七)强化科教和人才支撑。(十八)完善财政扶持政策。(十九)改善金融服务。



一、我对低成本航空公司的理解

Topic 1: My Understanding of Low Cost Carrier

- ❖ 低成本航空公司，又称为低价航空公司或廉价航空公司，主要特点包括经营客流量大的短程航线、多在二级机场起降、不提供免费餐点等。

The main features of Low Cost Carrier (LCC) include operating short-range routes with an amazing flow of visitors, arriving to and departing from second-class airports, and providing no free meals, etc.



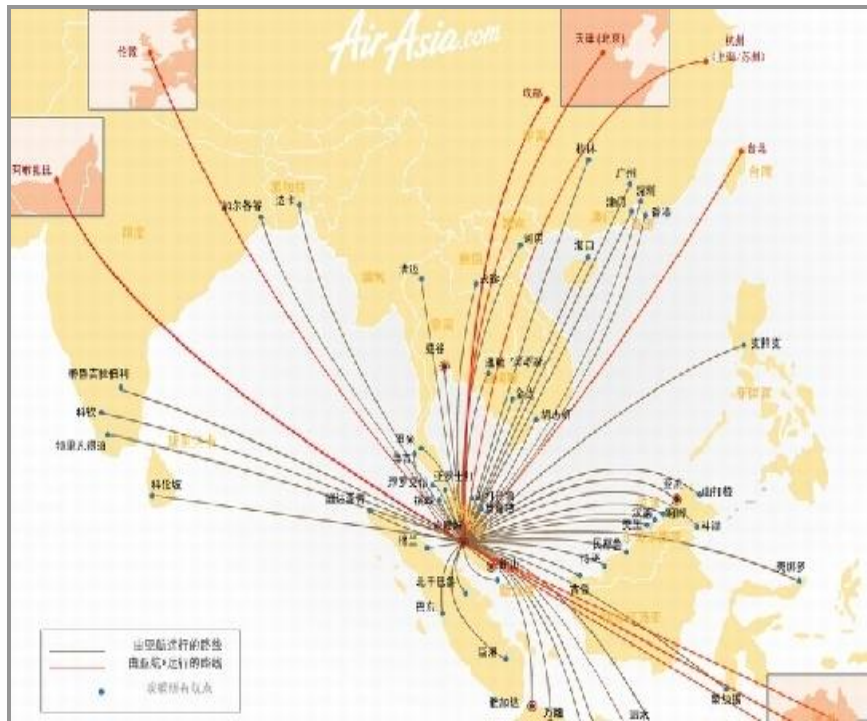


一、我对低成本航空公司的理解

Topic 1: My Understanding of Low Cost Carrier

- ❖ **开源式竞争策略：**运营点到点中短途直达航线，降低机票价格，优化全经济舱布局，增加座位密度等。

Competition Policy for Increasing Income: operate point to point non-stop medium and short range routes, reduce air fares, optimize the all economy seating configuration, and raise the density of seats, etc.





一、我对低成本航空公司的理解

Topic 1: My Understanding of Low Cost Carrier

- ❖ **节流式竞争策略：**采购单一飞机机型、科学合理携带燃油、减少旅客免费行李额度、建立节油奖励机制、二级机场运营等。

Competition Policy for Decreasing Expenditure: purchase aircraft with the single type, carry fuel scientifically, reduce free baggage allowance, build the reward system for saving fuel, and operate at second-class airports, etc.





一、我对低成本航空公司的理解

Topic 1: My Understanding of Low Cost Carrier

部分低成本航空公司 (Some LCCs)



**SOUTHWEST
AIRLINES®**

jetBlue
AIRWAYS®

Jet ★



RYANAIR
THE LOW FARES AIRLINE



春秋航空



CEBU PACIFIC



二、国际和国内低成本航空市场发展

Topic 2: International and Domestic Development of LCC Market

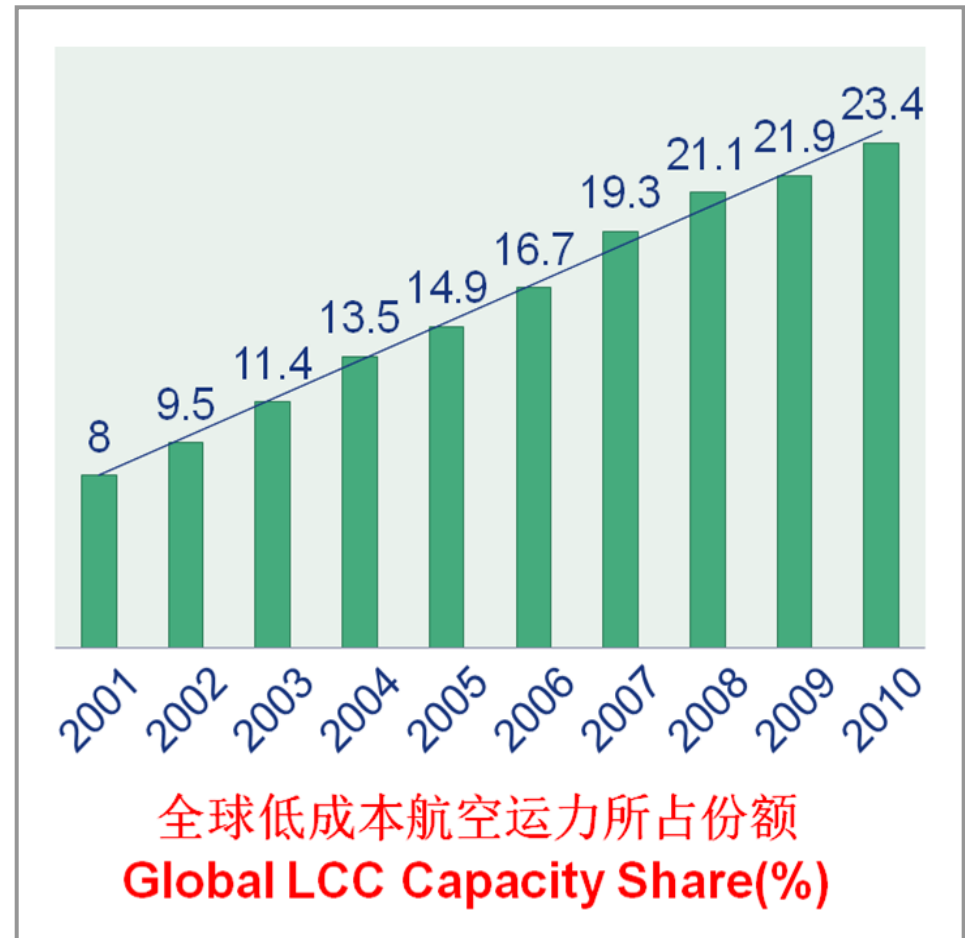
国际现状 (Current International Situation)

- ❖ 在全球航空公司总座位数中，低成本座位所占比例逐年增加。

Of all the seats provided by global airlines, the proportion of low cost seats has been on the rise year by year.

- ❖ 亚太地区航空运输需求最旺盛，低成本航空公司数量增长迅速，机队规模逐年增加。

Demand for air transport is the most exuberant in Asia Pacific, where the number of LCCs, as well as the fleet size, has been growing rapidly.





二、国际和国内低成本航空市场发展

Topic 2: International and Domestic Development of LCC Market

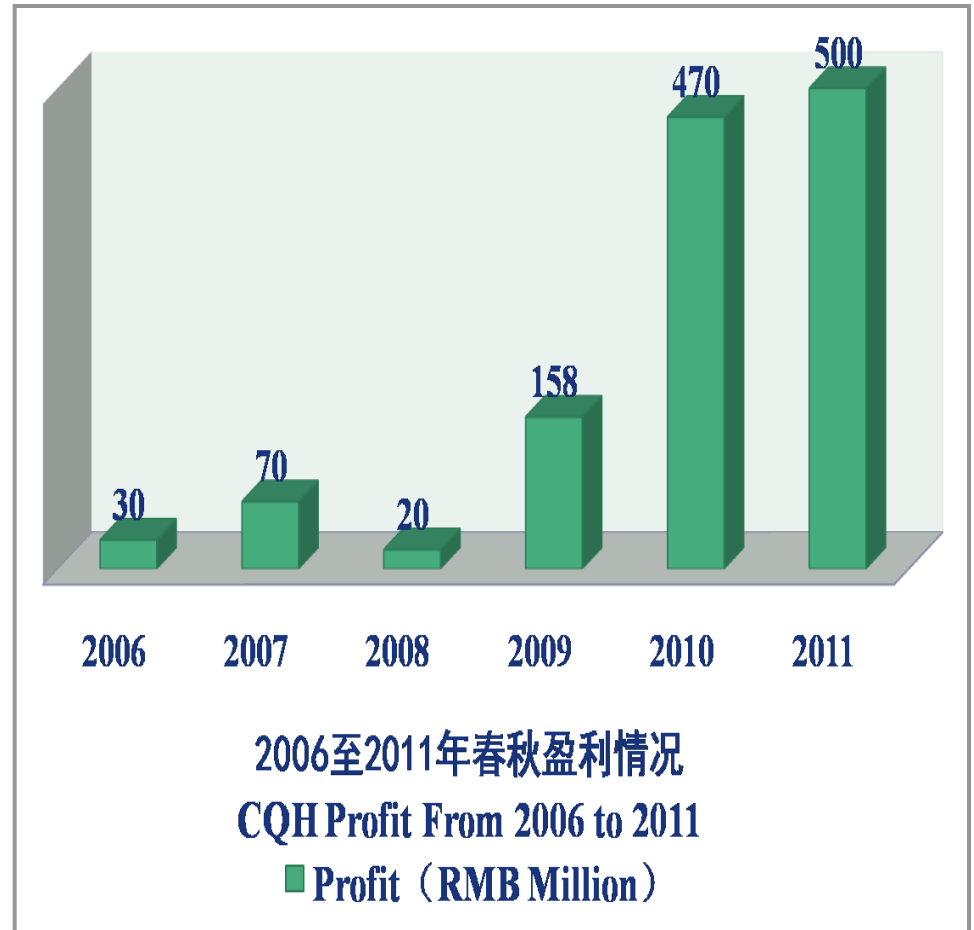
国内现状 (Current Domestic Situation)

- ❖ 在我国航空公司总座位数中，低成本座位比例占7%左右。

Of all the seats provided by China's airlines, the proportion of low cost seats is about 7%.

- ❖ 春秋航空是我国首个低成本航空公司，通过采取开源节流，自投入运营以来一直持续保持盈利。

Spring Airlines is the first LCC in China and has been consistently profitable since its inception by way of increasing income and decreasing expenditure.





三、空管系统怎样适应市场快速发展需求

Topic 3: How Can ATM Adapt Itself to the Rapid Development

(一) 不断提高空管系统总体保障能力

Measure I: Improve Overall ATM System Capacity Continuously

- ➔ 空管基础设施建设 ATM infrastructure construction
- ➔ 空域规划管理评估 Airspace planning, management and assessment
- ➔ 空中交通流量管理 Air traffic flow management
- ➔ 空管业务人员培训 Air traffic controllers training





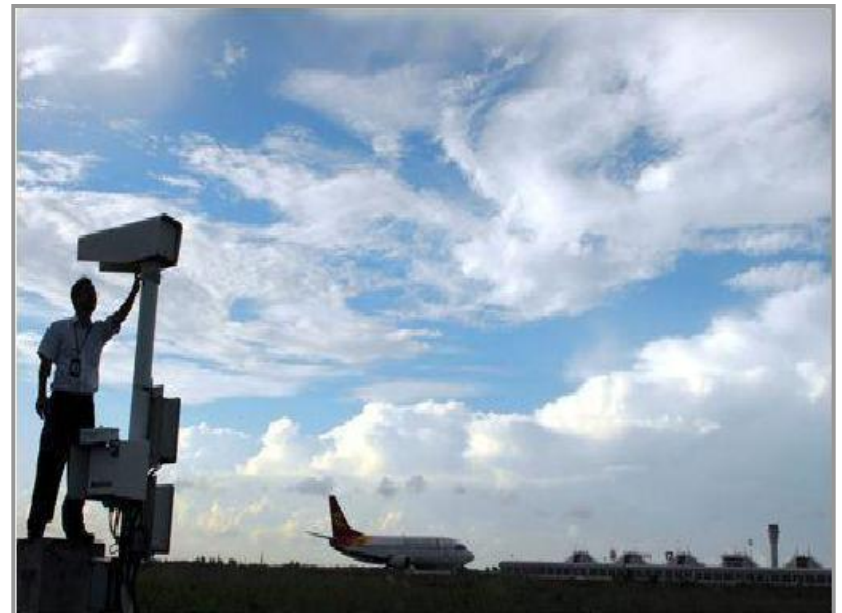
三、空管系统怎样适应市场快速发展需求

Topic 3: How Can ATM Adapt Itself to the Rapid Development

(二) 提升二线机场空中交通服务保障能力

Measure II: Improve ATS Capacity of Second-class Airports

- 完善二线机场空管通信、导航、监视等基础设施。
Improve CNS infrastructure at second-tier airports.
- 提高二线机场空中交通服务保障能力。
Increase ATS capacity at second-tier airports.





三、空管系统怎样适应市场快速发展需求

Topic 3: How Can ATM Adapt Itself to the Rapid Development

(三) 提升一线繁忙机场非繁忙时段服务保障能力

Measure III: Improve Non-peak Hour Service Capacity of First-class Airports

→ 充分利用一线机场的时刻资源。

Fully utilize the slot resources of first-tier airports.

→ 提升一线繁忙机场非繁忙时段的空中交通服务能力。

Increase ATS capacity at first-tier airports.





三、空管系统怎样适应市场快速发展需求

Topic 3: How Can ATM Adapt Itself to the Rapid Development

(四) 推进协同决策机制建设

Measure IV: Promote mechanism construction for CDM

→ 建设信息共享平台，实现各方协同会商。

Build platform to sharing information and make better decisions.

→ 及时向航空公司提供有用的、准确的运行信息。

Provide more useful and reliable information to airlines timely.





三、空管系统怎样适应市场快速发展需求

Topic 3: How Can ATM Adapt Itself to the Rapid Development

(五) 积极协同军方灵活使用空域

Measure V: Flexible Use of Airspace in Collaboration with the Military

→ 及时开放临时航线，有效缩短飞行距离。

Open temporary routes timely to effectively shorten the flight distances.

→ 科学规划航路网络，显著减少航班延误。

Plan route networks scientifically to significantly reduce flight delays.



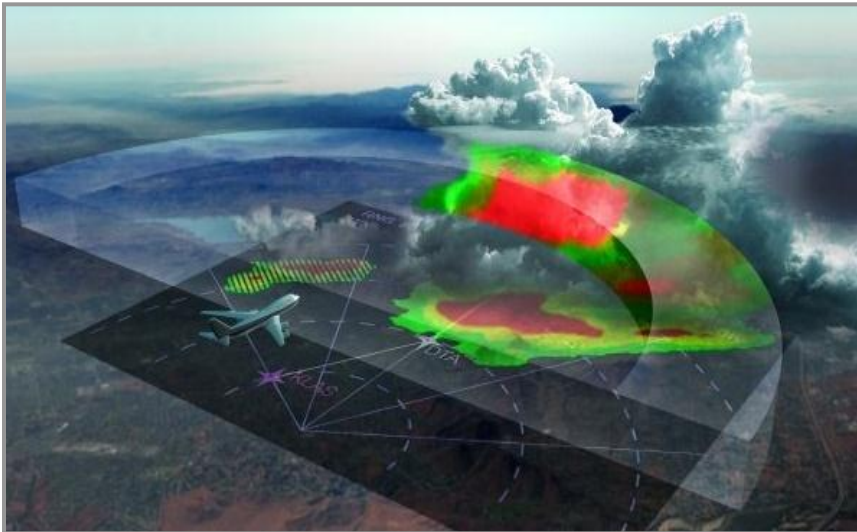


四、共建安全、绿色、高效的空中交通运输系统

Topic 4: Build a Safe, Green and Efficient Air Transport System

- ❖ 我国因受空域资源限制、空管基础设施薄弱、繁忙机场跑道数量不足和恶劣天气等因素影响，空域系统容量难以满足航空运输发展需求，亟需各方共同努力，共同建设安全、绿色、高效的空中交通运输系统。

The capacity of our airspace can't meet the demand for air transport due to many reasons, i.e., limited airspace resources, unsubstantial ATM infrastructure, insufficient runways at busy airports and bad weather, etc. China needs urgently to build a safe, green and efficient air transport system in collaboration with a wide range of stakeholders.





Thank You !



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