

出國報告(出國類別：其他)

## 出席第 15 屆「亞洲航線發展論壇 (Routes Asia 2017)」報告書

服務機關：桃園國際機場股份有限公司

姓名職稱：丁源宏 副處長

李思霈 業務員

派赴國家：日本 沖繩

出國期間：民國 106 年 3 月 18 日至 3 月 22 日

報告日期：民國 106 年 05 月

## 目錄

壹、目的.....	2
貳、過程及會談紀要 .....	4
一、論壇行程.....	4
二、本公司會談配對時間表.....	5
三、展區配置及參展單位.....	6
四、特色機場主題展區.....	7
五、航線論壇講座.....	12
六、會談紀要.....	17
參、心得與建議 .....	24
一、會談成果.....	24
二、議題彙整.....	24
三、建議事項.....	25
附錄：第 15 屆亞洲航線發展論壇(Routes Asia 2017)會議簡報	

## 公務出國報告提要

**出國目的：**出席第 15 屆亞洲航線發展論壇(Routes Asia 2017)

**主辦單位：**UBM Information 公司

**出國人員姓名：**丁源宏、李思霈

**服務機關：**桃園國際機場股份有限公司

**職稱：**副處長、業務員

**出國類別：**5.其他(參加國際會議)

**出國期間：**民國 106 年 3 月 18 日至 3 月 22 日

**分類號：**目：

**關鍵字：**航線、航線發展論壇、航線發展策略、時間帶、Routes

**內容摘要：**

本公司於 106 年 3 月 18 日至 3 月 22 日期間出席由英國 UBM 公司與沖繩觀光會議局(Okinawa Convention & Visitors Bureau, OCVB)主辦之第 15 屆亞洲航線論壇(Routes Asia 2017)，此次會議舉辦地點為日本沖繩，近幾屆航線論壇，本公司均派員與會，主要為和目標航空公司或國際機場管理代表洽商開設新航線或交流管理建設機場計畫。

透過與航空公司及機場管理代表的面談，歸納出航空公司主要關心的議題包括航權航約、市場運量預測、本公司是否提供獎勵計畫及機場容量設施現況。本公司將持續與航空公司聯繫且提供機場重大計畫之進展和商業案例，以供未來航空公司開發新航點之依據。

## 壹、目的

亞洲航線發展論壇係由 UBM Information 公司所舉辦之年度區域航空商業重要活動，本公司於 106 年 3 月 18 日至 3 月 22 日期間出席第 15 屆亞洲航線論壇 (Routes Asia 2017)，此次會議舉辦地點為日本沖繩，因應亞太地區航空市場具可觀性成長潛力，該論壇邀集眾多航空公司、機場經營代表、觀光旅遊業者與相關領域專家學者與會，提供一個擴展航線與促進網絡的多方交流平台。

以航線發展研究計畫顧問團隊所進行的航線發展分析為基礎，我們分別針對參與會談的航空業者，提供了航線現況、運量分析、成長預估、營運成本及獲利等資訊，以做為開發台北航線的決策輔助。

本公司在會談以及接受媒體採訪的過程中，主動更新桃園機場幾項重大計畫的最新進度，包含第二航廈擴建與第三航廈已經進入細部設計且預定於 2020 年完工，顯示桃園機場不斷求變求新的雄心以及積極與國際接軌的決心。2016 年桃園機場以 9.94% 的旅客成長率、逾 4200 萬旅客人次體驗，在眾多機場中獲得亮眼成績。

隨著亞洲區航線持續蓬勃發展，我們亦致力於加強桃園機場歐美地區的航空網絡，在此次論壇中也相當積極地與歐美航空業者進行洽談。

相較於鄰近機場，本機場的航空相關收費費率較具有競爭力，我們希望藉此優勢，能說服外籍航空業者將桃園機場納入拓展亞洲市場的選擇之一。回顧以往參與世界航線發展論壇中所蒐集到的資訊，已有越來越多國際機場祭出獎勵政策以吸引外籍航空公司開闢新航線，航空業者亦將此視為決定駐點機場的重要因素之一。為使桃園機場更具競爭力，本公司正計畫擬定更具彈性的收費方式，隨著新的收費方式啟用，我們期望會有更多航空業者對於開啟台北航線更加感興趣。

[NEWS](#) > [NETWORKS](#) > [AIRPORTS](#) > [ROUTES: TAIPEI TAOYUAN BANKS ON NORTH ASIA AS GROWTH ENGINE](#)

## ROUTES: Taipei Taoyuan banks on North Asia as growth engine

20 MARCH, 2017 | SOURCE: FLIGHTGLOBAL PRO | BY: AARON CHONG | SINGAPORE

**Taipei Taoyuan International airport expects strong passenger growth in Northeast Asia to drive expansion in the coming years.**

Speaking to FlightGlobal at Routes Asia in Okinawa, the airport's senior manager of business planning and marketing, Ting Yuanhuan, says that it saw passenger numbers increase by 24% in 2016, mainly driven by passengers from Japan and South Korea.

Ting explains that the figure was driven by a 4.3% increase in business from Taiwanese and other regional low-cost airlines. Out the 42 million passengers Taoyuan handled in 2016, 12.6 million came from the region, which was up 9.9% annually.

Last year, it saw the highest number of inbound passengers from North Asia originate from Japan's [Kansai International](#) and [Narita International](#) airports. Meanwhile, South Korea's Incheon was its "most improved" market.

That growth has helped to offset a 4% fall in Chinese tourists during 2016, after diplomatic tensions saw Beijing stop issuing visas for travel to Taiwan. Arrivals from China were also down 10% in January.

"The situation [with China] is getting worse," admits Ting. "But we also have other ideas to grow our network."

He says that Taoyuan is eyeing new connections to more European capital cities, and destinations in India.

▲FlightGlobal 於大會期間採訪桃園機場

## 貳、過程及會談紀要

### 一、論壇行程

#### Sunday 19th March

12:00 Registration, Diary Advice and Networking Area Open

14:00 – 17:30 Routes Asia Strategy Summit

18:00 – 20:00 Welcome Reception

#### Monday 20th March

07:30 Registration, Diary Advice and Networking Area open

08:30 – 10:55 Face-to-Face Meetings

08:55 – 09:15 Routes Talk: Focus on Vietnam

09:45 – 10:05 Routes Talk: Focus on Japan

10:35 – 10:55 Routes Talk: Focus on India

10:55 – 11:25 Refreshment Break

11:25 – 11:45 Routes Talk: How to make your airport stand out

11:25 – 12:35 Face-to-Face Meetings

12:15 - 12:35 Routes Talk: Regulatory issues affecting traffic rights and route allocations for airlines

12:35 – 14:00 Networking Lunch

14:00 – 15:35 Face-to-Face Meetings

14:00 – 14:45 Route Exchange Briefing: ANA Holdings Inc.

15:15 – 15:35 Routes Talk: Regulatory issues affecting traffic rights and route allocations for airports

15:35 – 16:05 Refreshment Break

16:05 – 17:40 Face-to-Face Meetings

16:30 – 16:50 Routes Talk: Understanding Social Media in China

17:40 Meetings End

19:00 – 23:30 Networking Evening and Routes Asia Marketing Awards

## Tuesday 21st March

08:00	Registration, Diary Advice and Networking Area open
08:30 - 10:55	Face-to-Face Meetings
10:10 - 10:55	Route Exchange Briefing: VietJet Air
10:55 - 11:25	Refreshment Break
11:25 - 12:35	Face-to-Face Meetings
11:50 - 12:35	Route Exchange Briefing: Finnair
12:35 - 14:00	Lunch hosted by Routes Asia 2018 host
13:10 - 13:15	Handover Ceremony
14:00 - 15:35	Face-to-Face Meetings
14:50 - 15:35	Routes Talk: Post Routes Clinic - powered by ASM Training
15:35 - 16:05	Refreshment Break
16:05 - 17:40	Face-to-Face Meetings
17:40	Final Meetings End

## 二、本公司會談配對時間表



Taoyuan International Airport - Yuan-Hung Ting  
PRC: RAS2179



Monday 20 March			Tuesday 21 March		
08:30-08:50	1	Norwegian (Req by Norwegian) - Table 41	08:30-08:50	1	Prague Airport (PRG) - Taoyuan Intl Airport - Table 104
08:55-09:15	2	Bangkok Airways (Req by Bangkok Airways) - Table 30	08:55-09:15	2	
09:20-09:40	3	StarFlyer (Req by StarFlyer) - Table 111	09:20-09:40	3	Kyushu-SAGA Intl Airport - Taoyuan Intl Airport - Table 102
09:45-10:05	4		09:45-10:05	4	Philippines AirAsia (Req by Philippines AirAsia) - Table 59
10:10-10:30	5	Malindo Air (Req by Malindo Air) - Table 34	10:10-10:30	5	Vanilla Air (Req by Vanilla Air) - Table 17
10:35-10:55	6	Virgin Australia Airlines (Req by Virgin Australia Airlines) - Table 40	10:35-10:55	6	
10:55-11:25		Routes (Future Host Meeting) - Routes Stand	10:55-11:25		Networking Break
11:25-11:45	7	Spring Airlines (Req by Spring Airlines) - Table 86	11:25-11:45	7	Lufthansa Cargo (Req by Lufthansa Cargo) - Table 11
11:50-12:10	8	Cebu Pacific Air (Req by Cebu Pacific Air) - Table 19	11:50-12:10	8	
12:15-12:35	9	British Airways (Req by British Airways) - Table 90	12:15-12:35	9	HK Express (Req by HK Express) - Table 47
12:35-14:00		Lunch Period	12:35-14:00		Lunch Period
14:00-14:20	10	Lufthansa (Req by Lufthansa) - Table 18	14:00-14:20	10	Jetstar Group (Req by Jetstar Group) - Table 7
14:25-14:45	11		14:25-14:45	11	Finnair - Table 76
14:50-15:10	12	Finavia - Helsinki Airport - Taoyuan Intl Airport - Table 104	14:50-15:10	12	Ontario Intl Airport Authority - Taoyuan Intl Airport - Table 101
15:15-15:35	13	AirAsia Group (Req by AirAsia Group) - Table 49	15:15-15:35	13	Qatar Airways - Table 77
15:35-16:05		Chubu Centrair Intl Airport(NGO) - Taoyuan Intl Airport - Table 104	15:35-16:05		B NZ Networking break
16:05-16:25	14	Royal Brunei Airlines (Req by Royal Brunei Airlines) - Table 21	16:05-16:25	14	DA 9
16:30-16:50	15		16:30-16:50	15	
16:55-17:15	16	Mumbai Intl Airport Pvt Ltd - Taoyuan Intl Airport - Table 106	16:55-17:15	16	Air New Zealand - Table 13
17:20-17:40	17	Malaysia Airlines (Req by Malaysia Airlines) - Table 88	17:20-17:40	17	Garuda Indonesia (Req by Garuda Indonesia) - Table 39
1740		ONE TO ONE MEETINGS END	1740		CLOSE OF BUSINESS DAY

### 三、展區配置及參展單位

本次論壇共邀集超過 100 間航空公司、200 間機場管理代表、近 30 間觀光旅遊業者、超過 900 名航空專業人士，會議進行方式由主辦單位配對議程之雙方於會談桌進行 20 分鐘之簡報與討論。此外，現場參展單位主要來自沖繩觀光局、日本旅遊局、菲律賓旅遊觀光局等觀光官方業管單位，亦有民航運輸發展、航線網絡研究或營運資料庫之業者，例如 OAG、ASM、Flightglobal 等亦出席與會。



▲論壇展場入口



▲展區配置及參展單位



#### 四、特色機場主題展區



▲主辦單位展區：沖繩觀光會議局



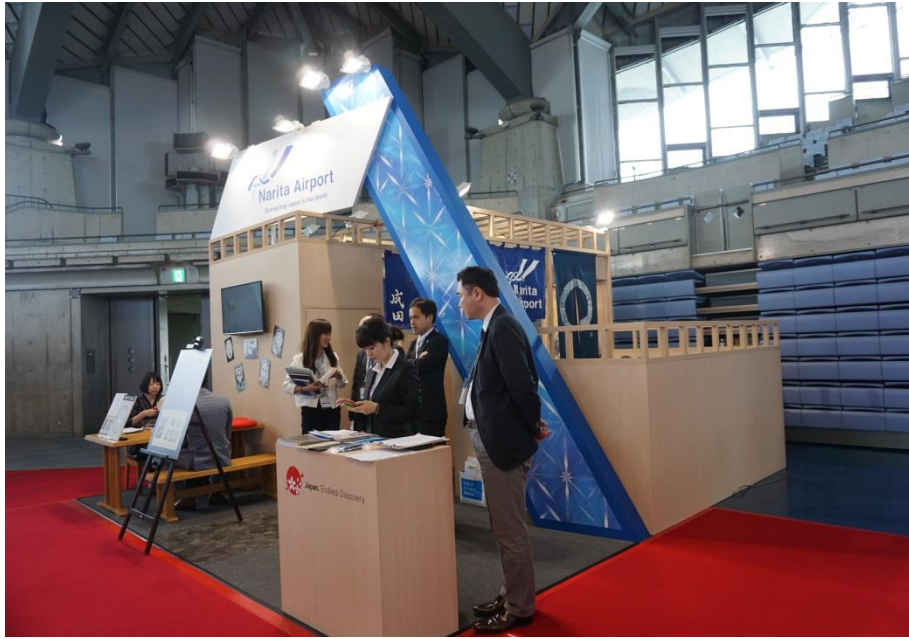
▲主辦單位展區：3D 影片觀賞



▲主辦單位展區：糖果機



▲主辦單位展區：沖繩水族館宣傳



▲成田機場



▲仙台機場



▲仁川機場



▲澳洲各機場管理代表專區



▲布里斯班機場

## 五、航線論壇講座

航線論壇講座(Routes Asia Strategy Summit)，透過邀請航空業者、機場代表對於航空產業趨勢及經驗分享，讓與會者了解最新的產業趨勢。活動講座主題與摘要如下：



主題：2017 亞洲航線論壇高峰會 Routes Asia 2017 Strategy Summit

摘要：

### 一、航空業者的觀點

本場次邀請航空業者代表座談，包含捷星航空、亞洲航空、香草航空等，他們對於亞洲市場初步意見如下：

1. 對中國市場的時間帶及機場設施運量的需求。
2. 航空業者對於亞洲航點希望有更多如第五航權、開放天空、雙邊協議等航全航約協定。
3. 低成本航空發展長程洲際航線為一趨勢，但是否能發獲利待檢驗。
4. 亞洲低成本航空市場的潛力。
5. 傳統航空公司的市場與低成本航空的競合狀況？亞洲航空(AirAsia)認為低成本航空具刺激市場潛力，而非完全取代傳統航空。
6. 亞洲航空集團的子公司考慮推出長程航線服務。
7. 亞洲市場容量是否過剩？或是於亞洲市場創造更多需求，填補過剩的市場供給。

### 二、機場的觀點

本場次邀請國際機場代表包含香港國際機場、孟買國際機場、新加坡樟宜機

場、東京羽田機場及大阪關西機場，對於亞洲機場面臨的挑戰，如機場壅塞、基礎設施與時間帶等議題進行討論，初步意見如下：

樟宜機場代表表示，抵達與出發航班的時間帶搭配之下(wave banks)，對於航空公司的轉機市場具吸引力。而航班平均分布的時間帶較易於機場的管理與營運。未來其第四航廈完工後，原本的航廈容量 6,600 萬人次預計將提升至 8,200 萬人次。

香港機場代表表示，對於打造智慧化機場，提升機場運營的效率，透過如下的內容：

1. 機場雙跑道每小時提供 68 個班機起降
2. 流量管理
3. 掌握每架客機的準時率
4. 打造智慧化航廈，透過自助行李託運、智慧報到系統、智能門快速通關、自助列印行李託運標籤等服務，與航空公司合作，提升旅客報到通關效率。


香港機場原本的設計為 4500 萬人次，已於 2016 年達到 7000 萬人次，新的擴建計畫正在為機場建設資金的籌備階段，需要與航空公司溝通，達到更有效率的機坪使用。目前北京、上海、廣州三大機場發展趨緩，其他二線機場透過開發長程航線爭取樞紐地位，如東北的哈爾濱、長春積極發展其新加坡航線；此狀況目前尚未看出對香港機場的顯著的影響。

日本的機場代表表示，機場採經營權私有化模式以提高競爭力、設施使用效率跟服務品質。

成田機場代表認為，為使機場設施發展獲得更多資源，對旅客以及航空公司收費是合理的。

#ROUTESASIA

**Presentation: How vulnerable are you to changes in government policies and to geopolitics?**



Alan Polivnick  
Partner,  
Watson, Farley & Williams

routes asia

Be. Knowers

主題：航空業對於政府政策及地緣政治的變動有多脆弱？

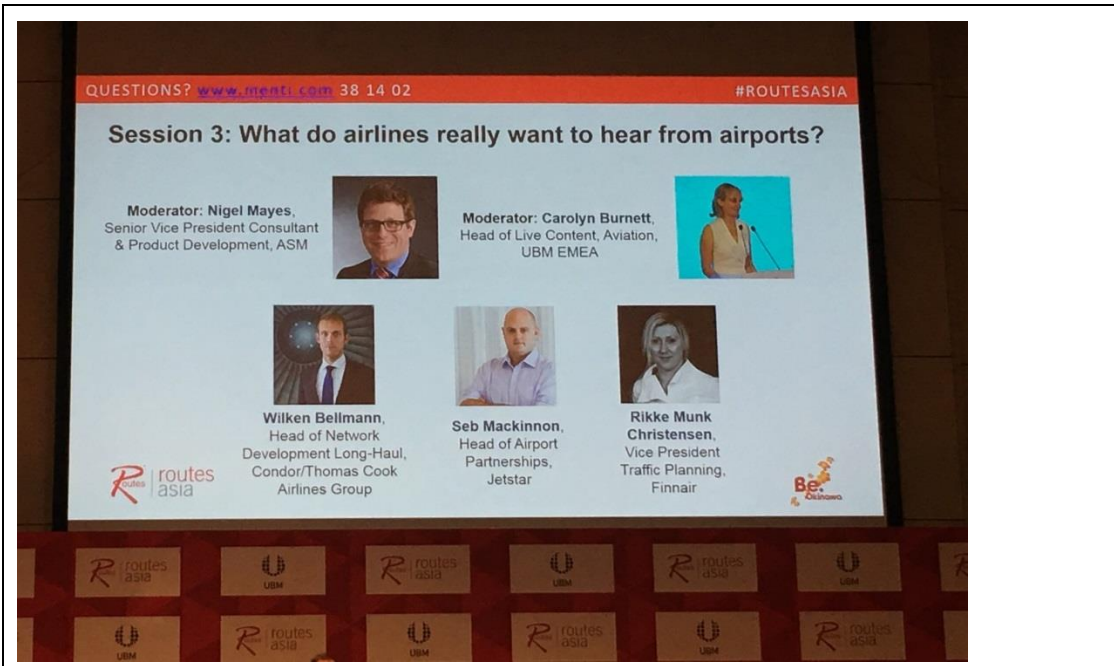
摘要：

由來自 Watson, Farley & Williams 公司的 Alan Polivnick 分享當航空業對於政府政策及地緣政治的變動面臨的影響。他尤其提到亞洲各國政府對於扶植國籍航空以及發展其航空市場必須取得找到一個平衡點，他的分享如下：

關於政治環境及地緣政治對於航空產業的影響，第一個案例為韓國部屬薩德導彈防衛系統，因而中國遊客停止到韓國觀光，對於其航空業產生了衝擊；另一個例子為東南亞的航空業者對於飛越巴基斯坦及印度邊際領空有一定的風險。

- 航空業其價格敏感的特性，對於政府政策及地緣政治的變動，較容易受其影響，因更仰賴政府單位提供如觀光、航線補助等支持。
- 時間帶限制：時間帶機制不夠清晰透明。
- 對於航空業者，即使擁有航權但是無時間帶(slot)仍無法開展其運營。



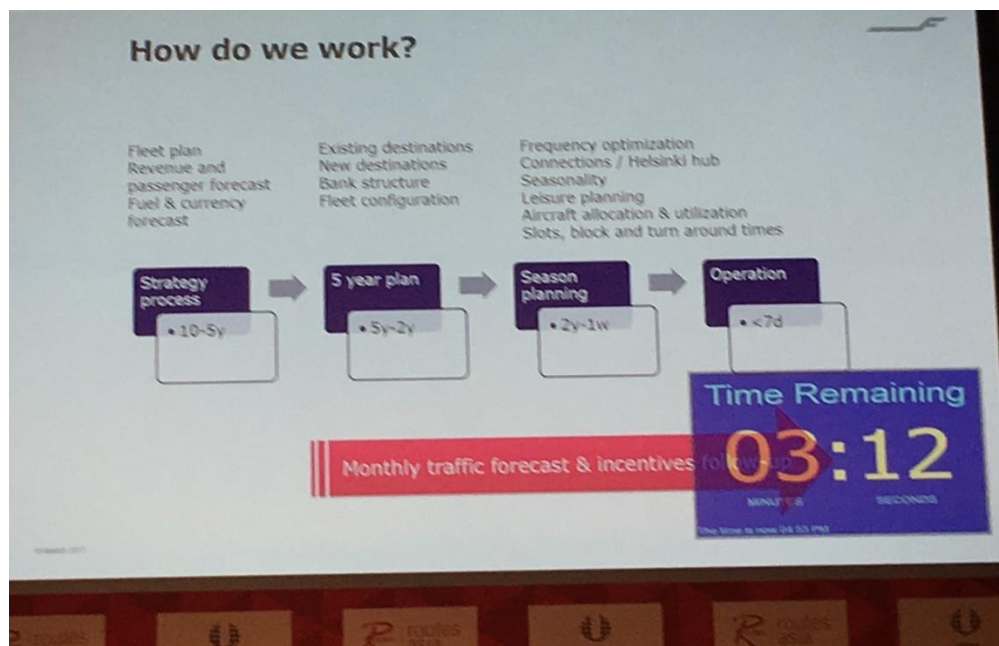


主題：航空業者真正想從機場公司聽到的內容是什麼？

摘要：

本場次邀請托馬斯庫克航空集團(Thomas Cook)代表、捷星航空集團代表及芬蘭航空的代表分享關於航空業者如何訂定其發展策略和商業計畫的經驗，他們的分享如下：

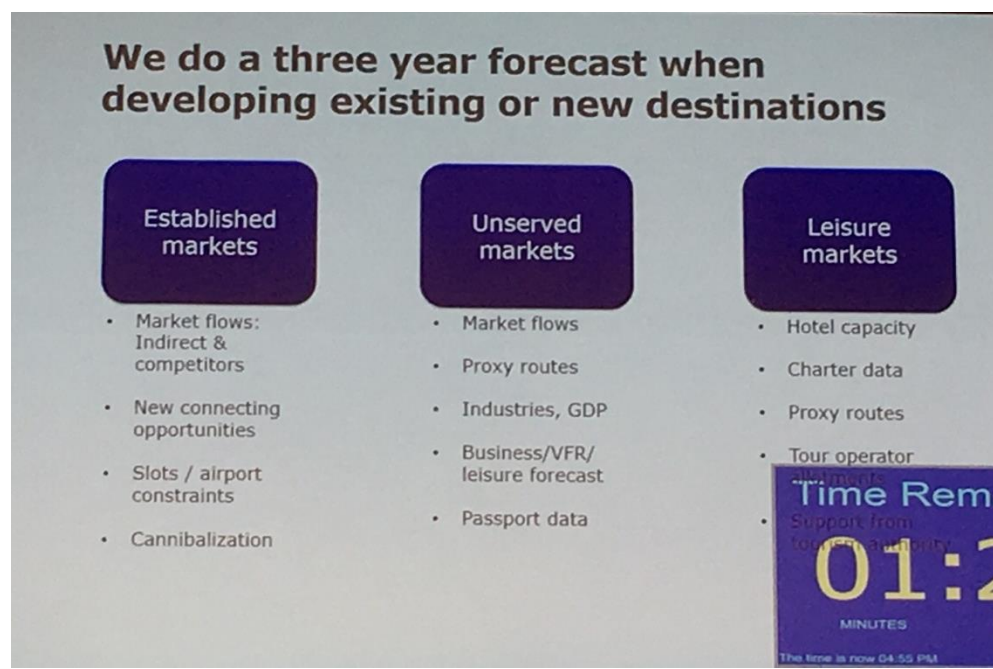
芬蘭航空代表表示，發展其航線策略的過程需要納入各種因素，機隊的規劃、旅客運量的預測、油價或匯率的預測都在一開始就放入市場的規劃。他也表示芬蘭航空已經完全使用 A350 取代 A340(最後一班 A340 航班時間為 2017 年 1 月 31 日)。



托馬斯庫克航空集團代表提到，對於開闢新航線，全方面的支持包含觀光局、其他相關單位的資源，都是航空公司希望獲得的支持。



捷星航空集團代表提到，提供 2 至 3 年的獎勵方案對航線規劃具有吸引力。



## 六、會談紀要

本公司與會人員針對參與會談的航空業者，除介紹臺灣觀光特色及強調國民出國旅遊逐年成長之趨勢，並提供桃園機場客運量的統計、機場現況及長期的規劃發展，更針對不同航線、航點的發展潛力提供個案分析簡報，以做為開闢台灣航線的決策參考資料。關於桃園機場現況及未來發展，大致介紹如下：

(1)隨著近年來桃園機場各項重大計畫陸續展開，藉著參與論壇的機會，我們主動說明機場最新狀況及近期規畫，第二航廈擴建計劃預計 2017 年底完成南側擴建；第三航廈已經進入細部設計，2020 年航廈主體將預計完工。此外，今年桃園機場捷運正式營運，旅客可以搭乘捷運直達台北車站 A1 站，並且可於 A1 站使用預辦登機服務。

(2)在旅客總運量方面，2016 年桃園機場的旅客總人次超過 4200 萬，成長率為 9.94%。尤其以東北亞、東南亞區域分別以 24%、14%的成長率拉抬整體旅客運量成長。在新闢航點方面，2016 年則陸續新增了長榮航空台北-芝加哥航線，2017 年加拿大航空將復飛台北-溫哥華航點。

此次與本公司進行會談的航空公司有 20 家、機場管理單位 5 家，分別為挪威航空、曼谷航空、星悅航空、馬印航空、維珍澳洲航空、春秋航空、宿霧航空、英國航空、漢莎航空、亞洲航空、皇家汶萊航空、馬來西亞航空、菲律賓亞洲航空、香草航空、漢莎貨運航空、香港快運、捷星航空、芬蘭航空、卡達航空、紐西蘭航空、印尼航空、赫爾辛基機場、新特麗亞名古屋機場、孟買機場、布拉格機場、安大略國際機場。

綜合本次與航空業者及機場管理代表會談的結果，以下為歸納的會談重點：

- (1)臺灣觀光旅遊介紹及國人出國旅遊成長趨勢
- (2)分析目標航空市場及桃園機場歷年運量數據

- (3)提供桃園機場最新營運資訊與未來營運規劃
- (4)與會談航空公司及機場代表交流航空產業訊息，如機隊規劃、航線布局及機場重大建設計劃等。

會談照片

會談對象	照片
挪威航空 Norwegian	 A photograph showing three men in business suits seated around a white table. They are engaged in a meeting. Two laptops are open on the table. A white sign with the word 'NORWEGIAN' is visible. The setting appears to be a trade show or conference booth.
曼谷航空 Bangkok Airways	 A photograph of two women and one man sitting at a table. The women are on the left, and the man is on the right. They are looking at documents on the table. A sign with the number '29' is on the left, and a 'BANGKOK AIRWAYS' sign is in the foreground. The background shows a booth with a TV screen.
星悅航空 StarFlyer	 A photograph of a group of people, including men and women, sitting around a long table in a meeting room. They are engaged in a discussion. A sign with the number '111' is visible in the background. The room has large windows and a professional setting.

馬印航空  
Malindo Air



維京澳洲航空  
Virgin  
Australia  
Airlines



春秋航空  
Spring  
Airlines



宿霧航空  
Cebu  
Pacific Air



英國航空  
British  
Airways



漢莎航空  
Lufthansa



亞洲航空集團

AirAsia  
Group



皇家汶萊航空

Royal Brunei  
Airlines



新特麗亞名古屋  
中部國際機  
場

Chubu  
Centrair  
Intl Airport





啟哈拉巴提·  
雪瓦吉國際機  
場  
Mumbai Intl  
Airport Pvt  
Ltd



馬來西亞航空  
Malaysia  
Airlines



菲律賓亞洲航  
空  
Philippines  
AirAsia



## 參、心得與建議

### 一、會談成果

本次會談與 20 家來自全球各地之航空公司、5 家國際機場代表交流會談，收穫頗豐，對於現營運桃園機場航線的航空公司，有計劃增開新的航班或是增班；尚未開航的航空公司對於臺灣市場則有極高的興趣，將本機場納入其評估對象中，另有些航空公司已將本機場列入其高度潛力的開航清單中。與個別航空公司或機場代表會談紀錄因涉及各公司業務規劃，無法列入本報告中，已於本公司內部另行陳報。

### 二、議題彙整

經歸納會談紀錄內容，各航空公司主要向本公司提出下列議題，(一)航權航約類、(二)市場運量預測、(三)桃園機場有無獎勵計畫補助航空公司開航以及(四)本機場時間帶容量議題。

- (1) 有關航權航約類與機場時間帶議題，本公司將彙整航空公司提出之內容並於會後轉提交民航局，轉請民航局適度回應或由本公司回覆。
- (2) 市場運量預測：本公司提供歷年桃園機場區域航線運量分析，且委由國際航線顧問協助利用模型預測各航點潛在市場，提供航空公司開發新航點評估依據。
- (3) 航空公司獎勵計畫：本公司目前提供新入駐航空公司或新航線之行銷露出補助。為維護國際機場競爭力，擬參考國際航線顧問之航線發展策略之建議及參考國際標竿機場推行之獎勵計畫，提供航空公司營運之獎勵。
- (4) 時間帶：目前機場尖峰時間的時間帶近乎滿，鼓勵有意增班或開航的航空公司選擇離峰時間帶，對於未來將推行的新機場園區費率，航空公司也可因其選擇離峰時間帶而降低機場服務費成本。

### 三、建議事項

因應桃園機場第三航廈等未來新增容量設施，本公司應及早與各國際航空業者建立聯繫管道，且持續更新本公司重大計畫進度等訊息，以利開發未來新航線機會。

呼應本公司 106 年航線發展策略，與國際航線顧問研提商業案例：(1)強化歐美區域航點、座位供給數，向航空業者提出歐美航線商業分析個案。(2)深耕鞏固亞洲區域航點航線密度，評估第二線(2<sup>nd</sup> tier)潛力航點。

除針對具潛力之未直飛航線提出商業個案以外，擬展開航線激勵方案之討論會議，整合本公司財務、會計、業務、航務處等單位意見，提出航線激勵方案供航空公司新長程航線等服務之支持。

肆、附錄：商業案例簡報(英國航空-「倫敦希斯洛-桃園」及德國漢莎航空-「慕尼黑-桃園」)檢附本屆會議主要設定之目標航線簡報。



# ***A Unique Opportunity to Serve Taipei from London***

*Routes Asia 2017*



Taoyuan Airport  
Taiwan

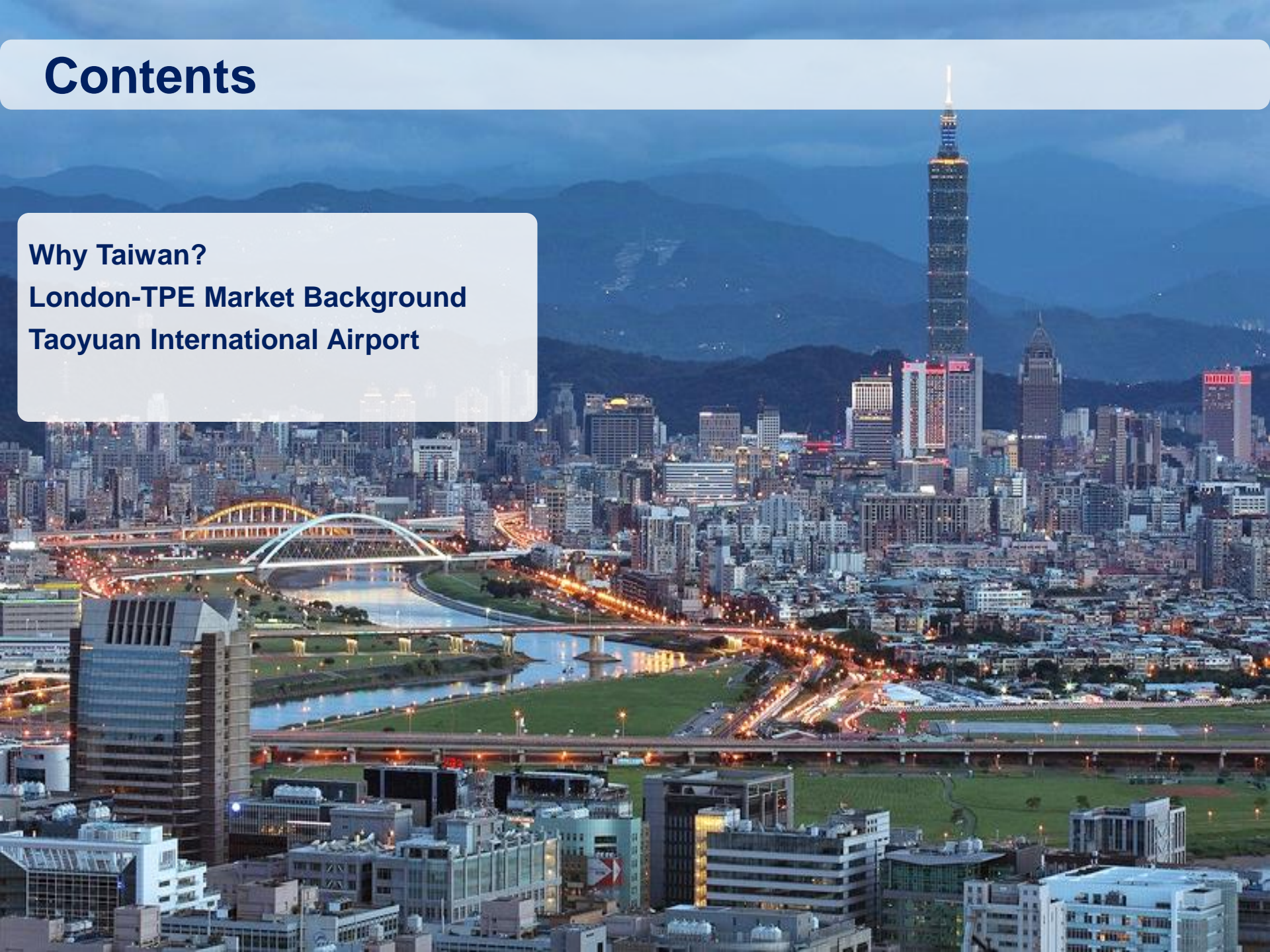


# Contents

**Why Taiwan?**

**London-TPE Market Background**

**Taoyuan International Airport**



# Why Taipei?

British Airways is a leading global airline that is well placed to serve the Taipei market

- Established and strong **London-Taiwan links**
  - trade & investment, technology, research & development, tourism and education
- **TPE Award winning airport** customer service and range of facilities
- **High volume** and **premium market** between Taipei and Europe





# Why Taiwan?

## Economy, Trade, Tourism

# Market Fundamentals

## Established Business and Tourism Market

### Taiwan Economy

- Taiwan has a healthy economy and strong GDP growth
- Q3 2016 performance prompted an upgrade in 2016 growth to 1.2%
- It remains on track for improved growth of 2.1% by 2018

### Strong Demand to Europe

Taiwan received **10.4m** visitors in 2015 (**+5.3%** versus 2014)

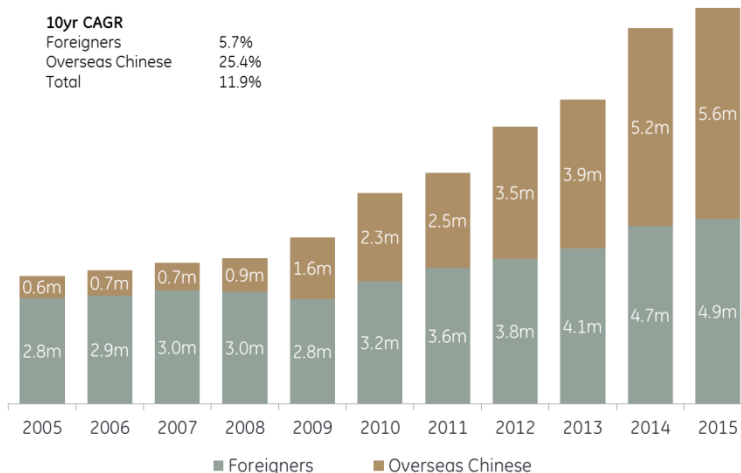
Foreign visitors to Taiwan grew **8.6% CAGR** over the last 5 years

Of the top 12 countries for international tourist arrivals in North East and South East Asia, **Taiwan ranks #3 for the highest increase** in share of arrivals 2015 versus 2010 (+1.2%)

World Travel & Tourism Council forecast visitor growth to Taiwan (Foreigners + Chinese) of **2.9% CAGR** over the next 10 years

Visitors To Taiwan 2005-2015

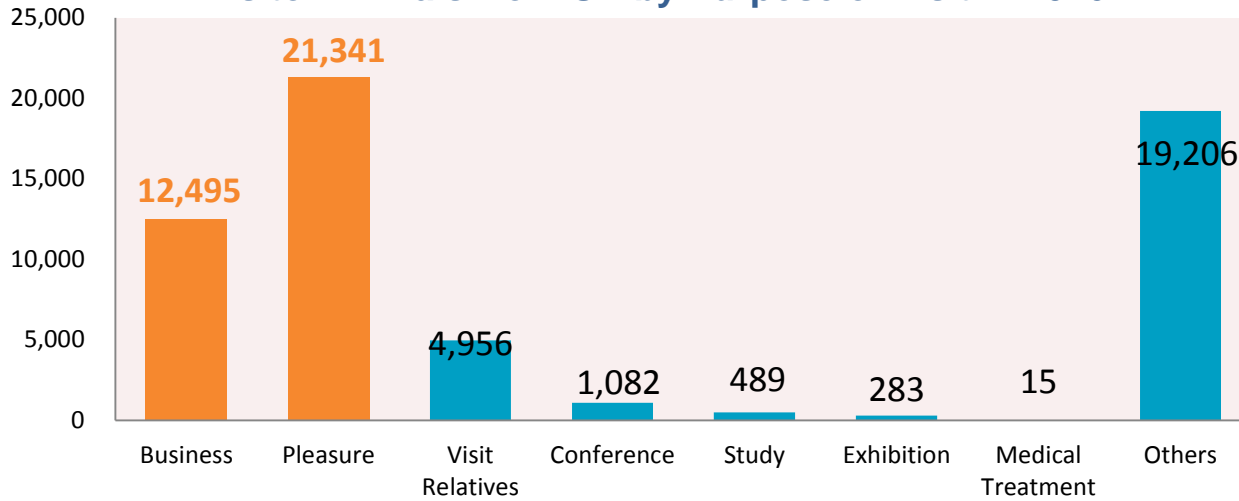
Source: Tourism Bureau MOTC





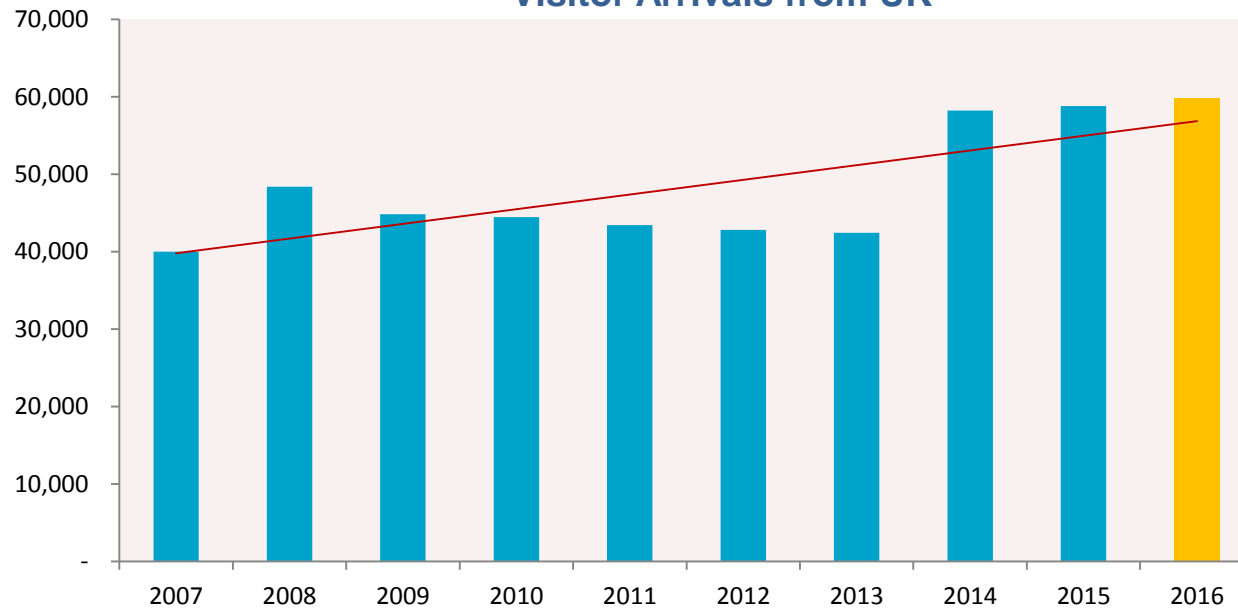
# Tourism Statistics

## Visitor Arrivals from UK by Purpose of Visit in 2016



*Unit: Persons*

## Visitor Arrivals from UK



*Unit: Persons*

# Taiwan Ranks Highly as a Leading Global Destination



**#1 Remarkable Place for Solo Travel**  
BuzzFeed (2014)

**#1 World's Best Food**  
CNN Facebook Fan page (2015)

**#6 Emerging Tourist Destination**  
Skyscanner global destination rankings (2016)

**#10 'Must See' Attraction – Taroko Gorge**  
Virgin Travel Insurance rankings (2013)

**Top 10 Cycle Route Worldwide – Sun Moon Lake**  
One of the world's most beautiful cycle paths, CNN (2012)

**#11 Tourist Site Worldwide**  
New York Times ranking of 52 sites (2014)

**#16 Global City – Taiwan, MasterCard Worldwide Index of Global Destination Cities (2015)**

**One of the Best Tourism Destinations**  
Lonely Planet global rankings (2015)

# Enjoy Leisure, Entertainment and Tourism

## Easily accessible from TPE gateway

Explore **dramatic scenery** in several national parks like **Shei-Pa, Yangmingshan, Yushan and Taroko**



**SHEI-PA**  
NATIONAL PARK  
Republic of China (Taiwan)

Family friendly **beaches, luxury resorts** and **outdoor activities** including Kenting Beach



Experience Taipei's famous **night markets** and bustling street life



Discover **traditional architecture** and beautiful **historical sights**

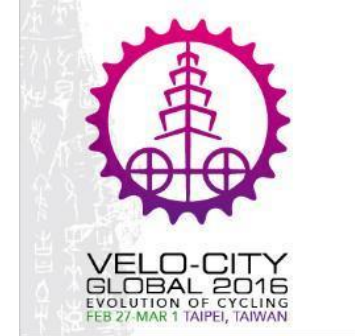


# Recognised World Leader for Cycling Tours

Numerous Designated Routes including famous 29km Sun Moon Lake bike path



**Taiwan**  
THE HEART OF ASIA



City Government designed **dozens of cycle routes** to best experience Taipei's architecture, scenery, culture, wilderness, history, nature and street food



# Taoyuan Aerotropolis Development

Taiwan's largest ever development project



4,687 ha designated area – entire plan expected to be complete in **2023**

300,000 job opportunities and **US\$77bn** economic benefit

Will enhance **international competitiveness of Taoyuan** and promote economic status of Taiwan

Shortest average flight time to the **major Asian cities** (2.55 hours)

Closely **linked** with the Northern Taiwan Metropolitan Area

Sea-air **dual port development** of the Taoyuan International Airport and Taipei Port



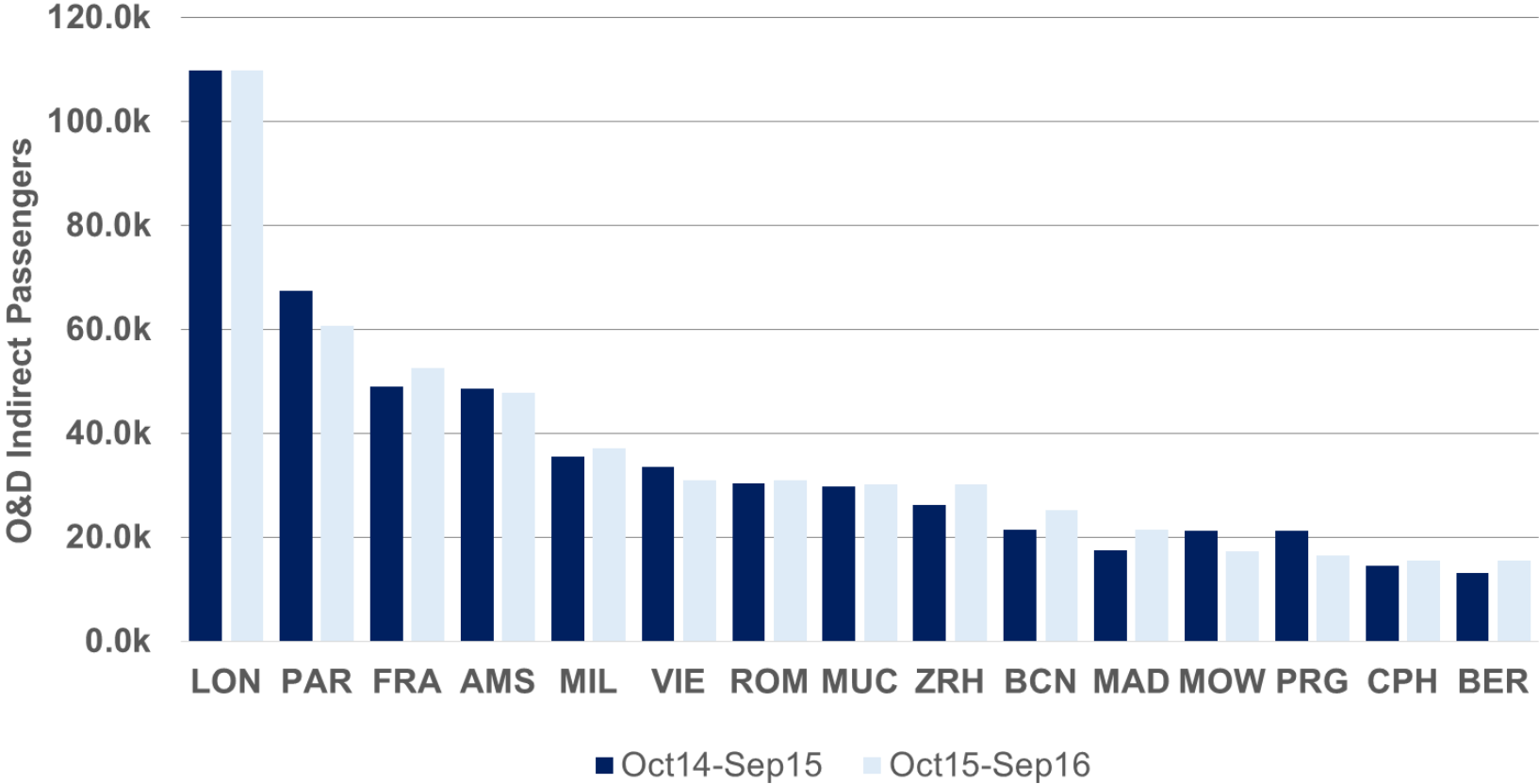
# LHR-TPE Market Background

# Market Overview

## Taipei-Europe Market

### Taipei - Europe - Top Indirect O&D Routes

Source: Sabre MI, Oct14-Sep15 vs. Oct15-Sep16

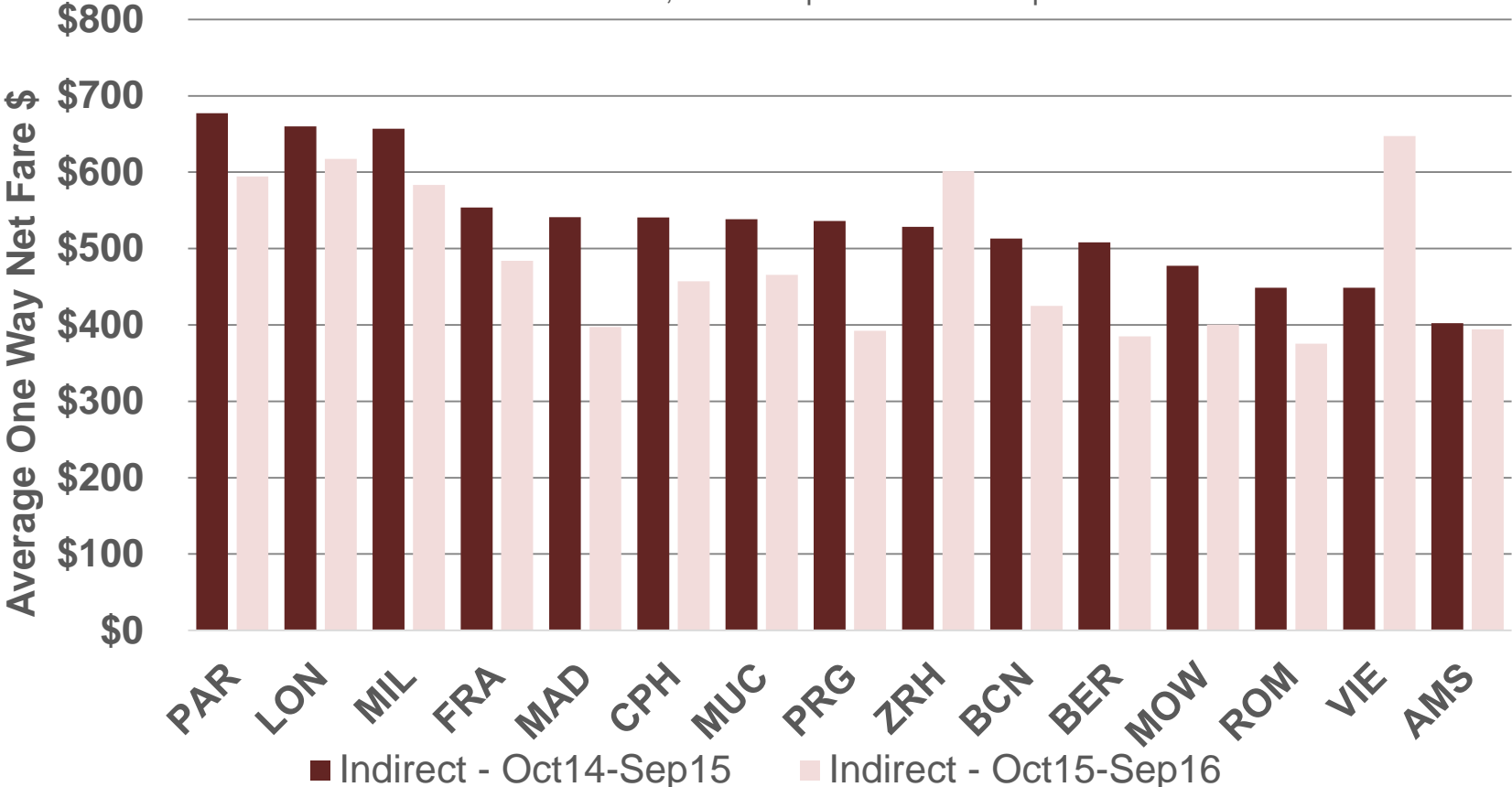


# Market Overview

## Taipei-Europe Market

### Taipei - Europe - Top Indirect O&D Routes Average One Way Net Fares

Source: Sabre MI, Oct14-Sep15 vs. Oct15-Sep16



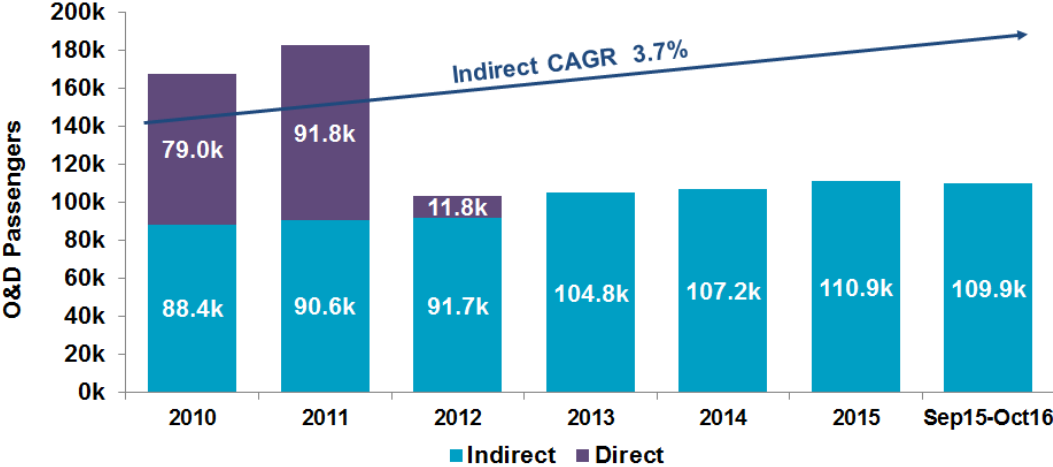


# Market Background

## Point to Point Traffic

Taipei - London Point to Point Traffic 2010-2016

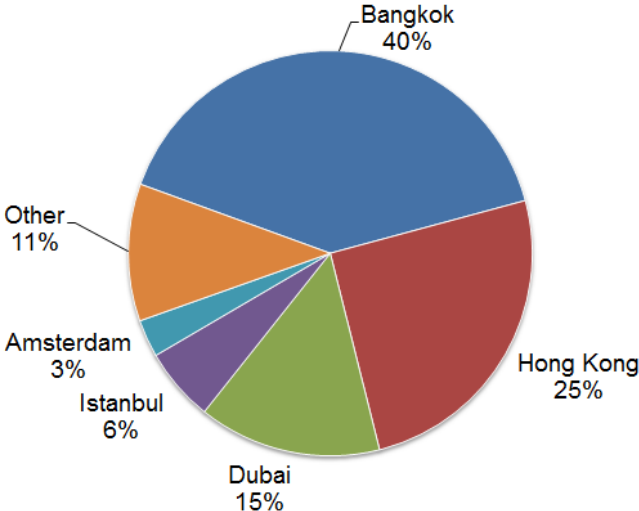
Source: Sabre MI 2010-2016



Indirect traffic increased by **3.7% CAGR** 2010-2016  
**109.9k** passengers flew indirectly between Taipei and London (Sabre MI data year ending September 2016)

Taipei - London Point to Point Traffic Major Connecting Points

Source: Sabre MI September 2015 - October 2016



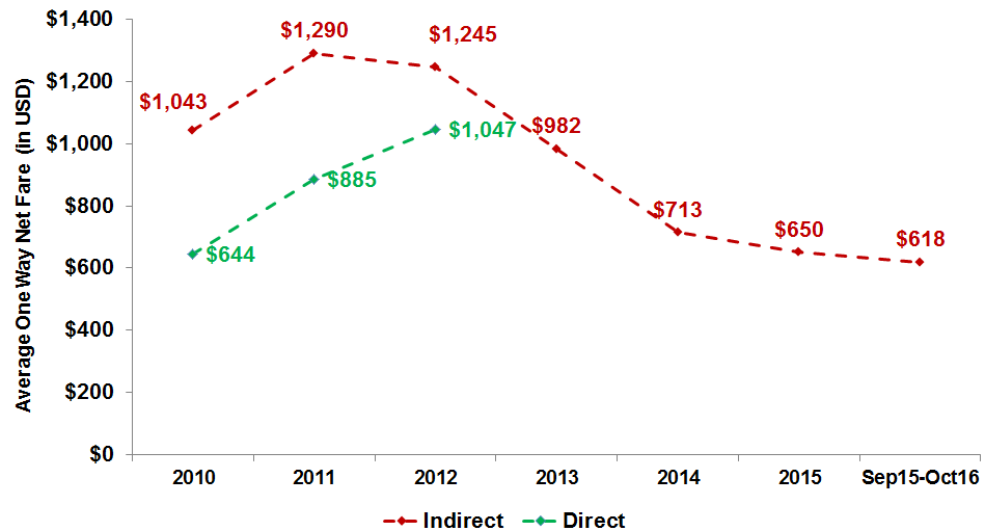
Several hubs share indirect traffic connecting Taipei and London  
 Bangkok (**40%**) provided the most connections followed by Hong Kong (**25%**) and Dubai (**15.0%**)

# Market Background

## Point to Point Fares

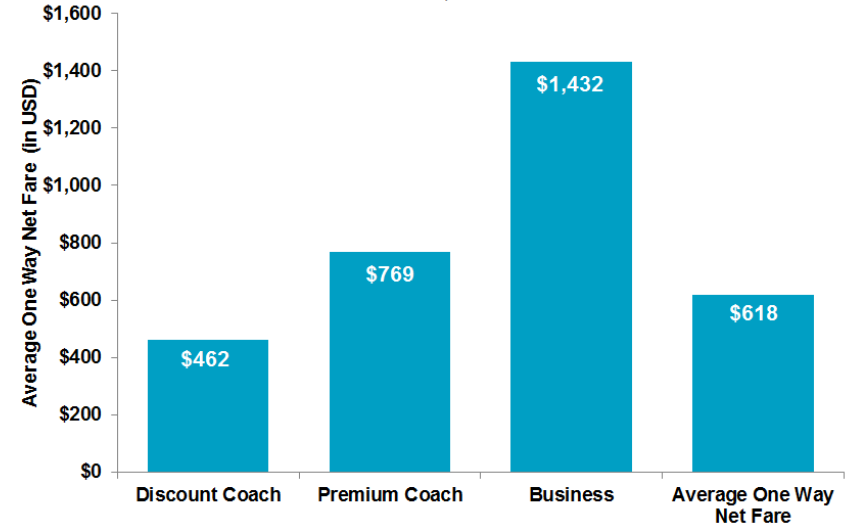
Taipei - London Point to Point Fares 2010-2016

Source: Sabre MI 2010-2016



Taipei - London Point to Point Fares by Class

Source: Sabre MI September 2015 - October 2016



Average O&D one way net fares between Taipei and London declined from **\$1,290** in 2011 to **\$618** in 2016 (Sabre MI data year ending September 2016)

Increased competition over hubs with lower fares has led to increased demand

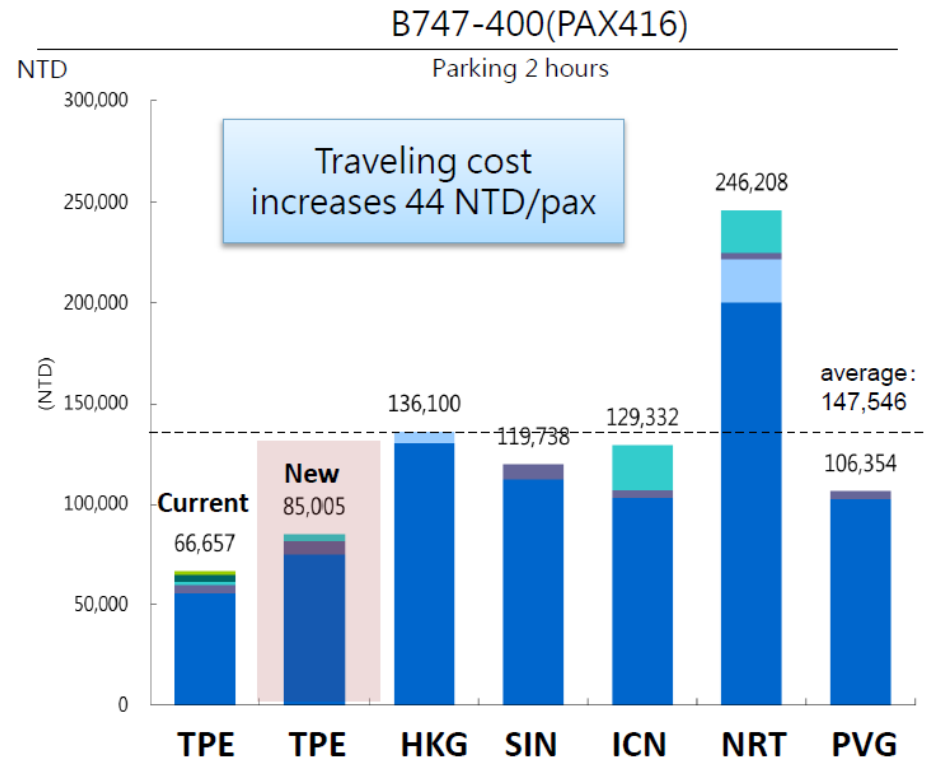
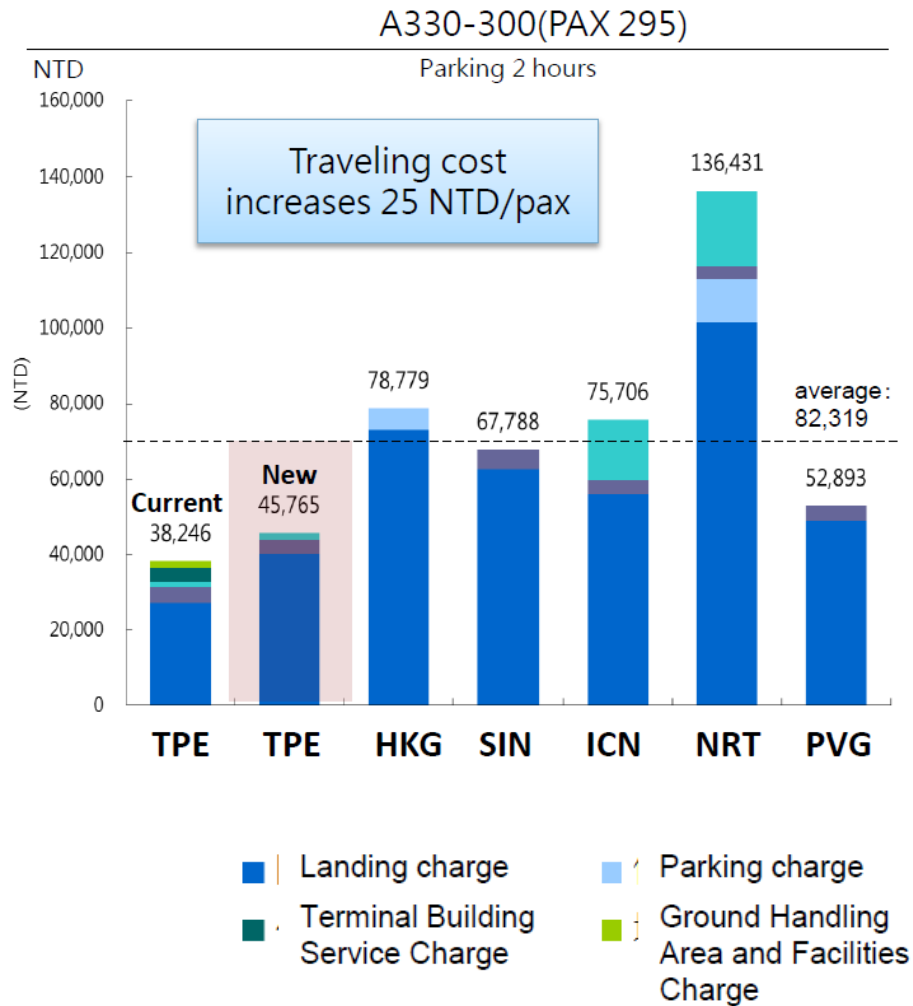
Average O&D one way net fares between Taipei and London show low fares in Coach (**\$462**) and high fares in Business (**\$1,432**)



# Taoyuan International Airport

# TPE Airport Charges

New rate setting will not surpass average charges of main East Asian airports



# TPE Marketing Support Program

## TTIA New Airlines and Routes Promotion Incentive Programs

Program aims to invite new air carriers to operate and develop new routes at TTIA

Candidates categories:

**Category 1** - New air carrier entrant, operating regular flights from TTIA

**Category 2** - Newly opened regular direct route to TTIA

**Category 1** should be air carriers that have not operated on any route at TPE.

**Category 2** routes should not have been opened for the last two years before application.

Qualified candidates have marketing opportunities in TTIA's official social media, internet media and print media.

TTIA New Airlines and Routes - Promotion Incentives Program



Media	Content	Times	Comments
TPE Social Media	Facebook post	Chinese and English content + pictures	Airlines should provide TIAC with marketing content 14 days before inauguration flight. TIAC reserves the right to edit any submission.
	Instagram post	English content + pictures	
	Twitter post	English content (less than 140 words)	
Internet Media	Major portals, news websites, social forums	Chinese message less than 1000 words	1. No specified position or date should be appointed. 2. Marketing content should be submitted to TIAC no later than 45 days before publication. 3. TIAC reserve the right to revise the submission that is to be published.
Print Newspapers	Major newspapers	Chinese message less than 200 words	
Print Magazines	Financial and travel magazines	Full page advert	Twice 1. Airline logo and city image of the new route should be submitted to TIAC in A1 format. TIAC will complete the artwork production and arrange the media exposures which airlines select 2 media candidates from the media list. 2. TIAC reserve the right to revise the submission that is to be published.

# TPE Marketing Support Program

## Application Procedure



Program expires on **31 December 2017**.

TIAC will revise the budget execution and effectiveness to extend program.

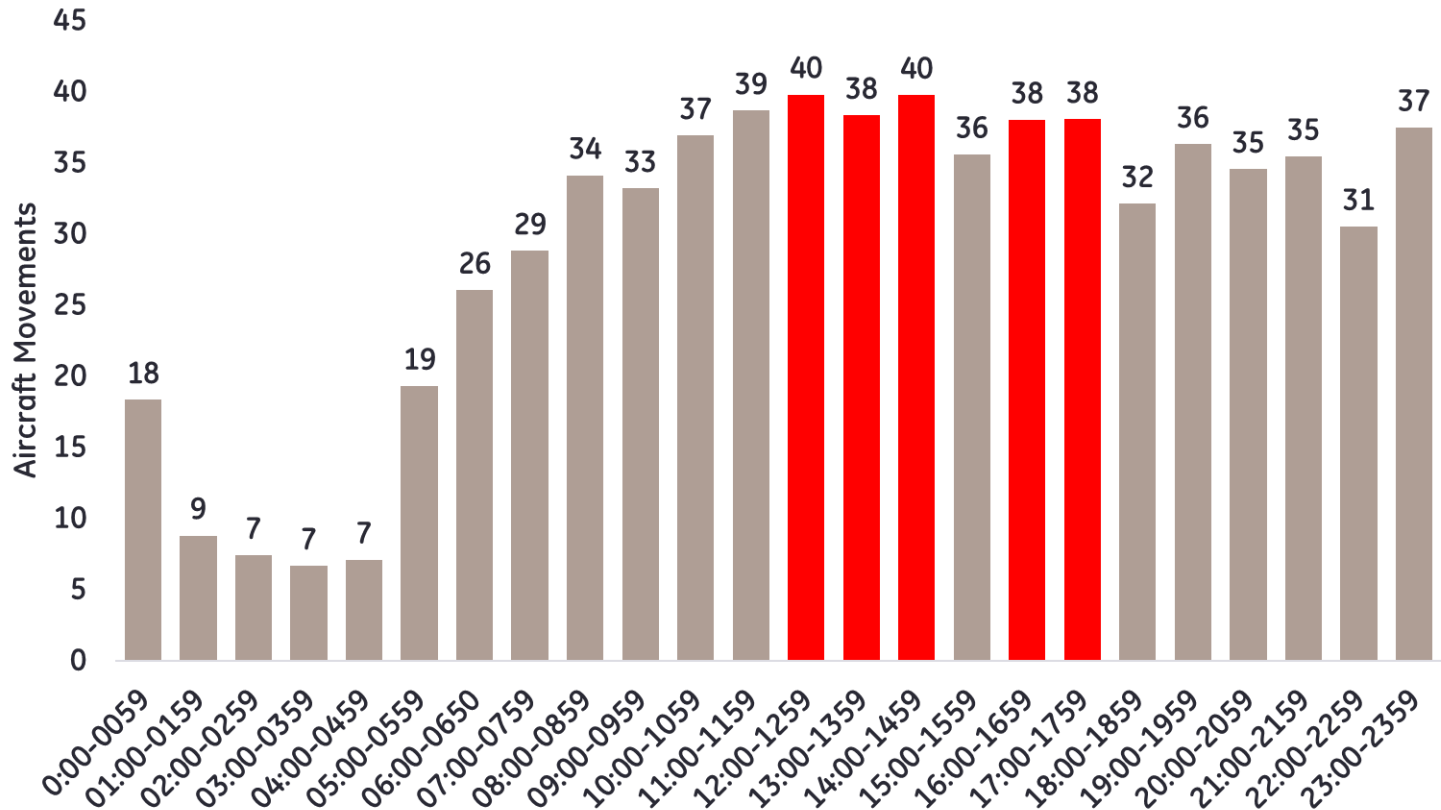
Program takes effect after official announcement.

TIAC has the right to extend, revise program.

# TPE Slot Availability

## TPE Aircraft Movements - Daily Average

Source: Taoyuan International Airport, February 2017



Peak hour **12:00 – 15:00** and **16:00 – 18:00**

Capacity of **50** movements per hour and **90** movements in **2** consecutive hours

# New TPE Terminal 3 under Construction

A world class hub for East Asia

State of the art world-class  
T3 facility opening 2020

45mppa initial capacity with  
26 boarding gates





# Steps to Commence Operations at Taipei

## Decision to serve



*Contact CAA for official permission to operate at TPE*

## Application

- Air Route Certificate
- Application for Station Manager Office, if applicable

*Discuss operations with TIAC*

## Confirmation on

- Terminal choice
- Check-in counter arrangement
- Boarding gate arrangement
- IT & communication system
- Office rent agreement
- Other administration issues

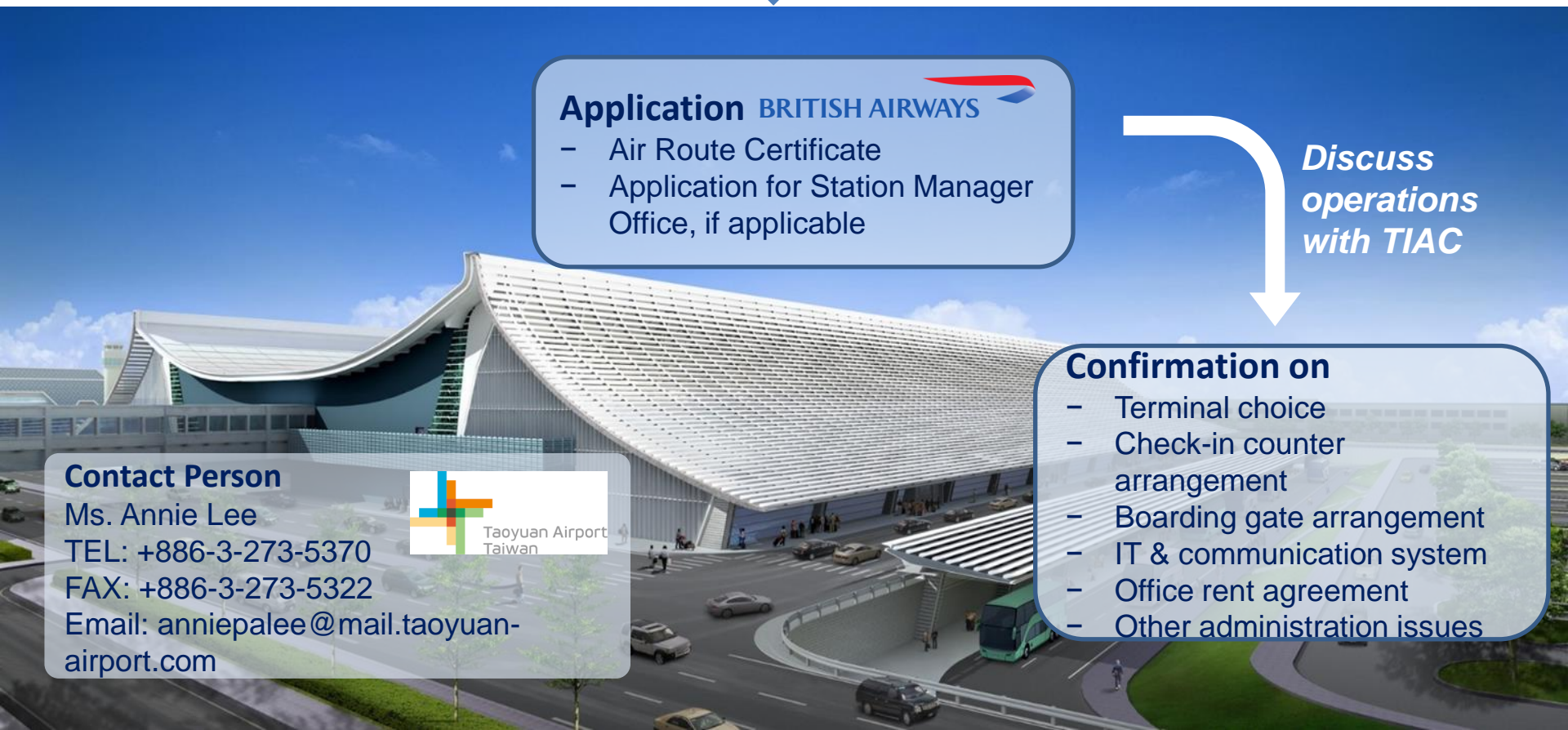
## Contact Person

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Email: [anniepalee@mail.taoyuan-airport.com](mailto:anniepalee@mail.taoyuan-airport.com)





**Thank You**



## Contact

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Tel: +886 3 2735555

Email: [yhting@mail.Taoyuan-airport.com](mailto:yhting@mail.Taoyuan-airport.com)



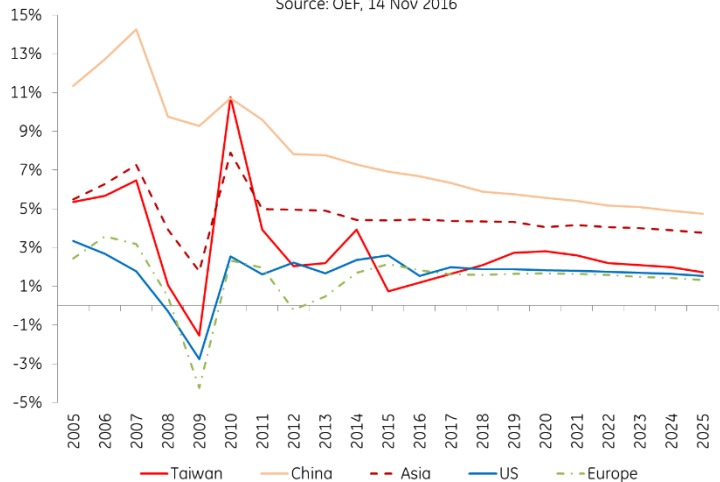


# Appendix

# Taiwan has a healthy economy and strong GDP growth

Real GDP Growth 2005-2025

Source: OEF, 14 Nov 2016

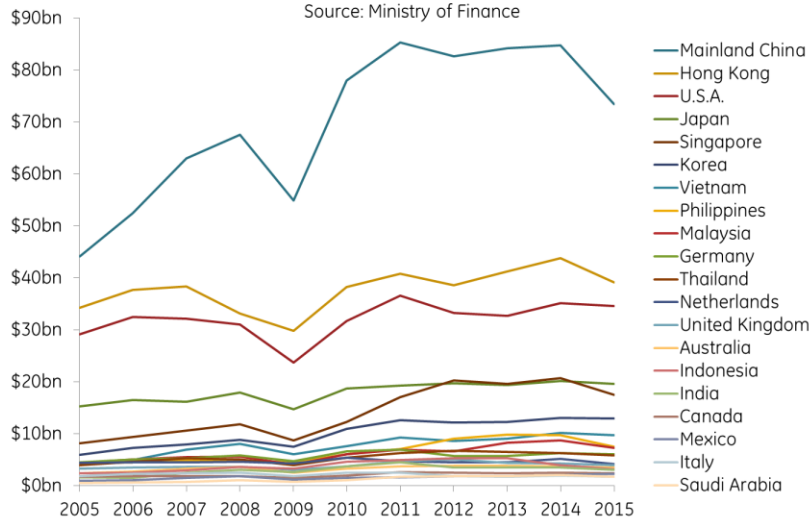


- Taiwan Q3 2016 performance prompted an upgrade in 2016 growth to 1.2%. Economy remains on track for improved growth of **2.1% by 2018**
- The outlook for Taiwan **political stability** in 2017-21 is good.

Taiwan Exports by Country 2005-2015

Top Markets by Value

Source: Ministry of Finance



- Taiwan intends to become **less dependent on the Chinese market** for exports.
- Currently it exports twice as much to China than to its second-largest export market, the 6 core members of the Association of Southeast Asian Nations (ASEAN).



# ***A Unique Opportunity to Serve Taipei from Munich***

*Routes Asia 2017*



Taoyuan Airport  
Taiwan



**Lufthansa**

# Contents

<b>Summary of Route Forecast MUC-TPE</b>	<b>4</b>
<b>Why Taiwan?</b>	<b>5</b>
<b>Links Between Taipei and Munich</b>	<b>11</b>
<b>MUC-TPE Market Background</b>	<b>19</b>
<b>MUC-TPE Forecast</b>	<b>24</b>
<b>Taoyuan International Airport</b>	<b>32</b>
<b>Choose TPE</b>	<b>39</b>
<b>Appendix</b>	<b>42</b>
<b>Forecast Methodology</b>	<b>43</b>
<b>Economy &amp; Tourism</b>	<b>48</b>



# Why Taipei?

Lufthansa is a leading global airline that is well placed to serve the Taipei market

- TPE is ideally located as a **transfer hub for Lufthansa** - Munich service
  - to SE/NE Asia
- Substantial demand from Taipei beyond Munich – to **Europe 672,000**
- Substantial demand from Munich beyond Taipei – to **SE/NE Asia 404,800**
- Over **55,000 Germans** visit Taiwan annually and over **53,000 Taiwanese** visit Germany
- Established and strong **Munich-Taiwan links**
  - trade & investment, technology, research & development, tourism and education
- Germany is Taiwan's **#1** European trading partner and **#2** foreign investor
- **250 German companies** have activities in Taiwan
- Both Munich and Taipei are major **Tech Cities**
- **TPE Award winning airport** customer service and range of facilities
- **High volume** and **premium market** between Taipei and Europe



**Lufthansa**



# Opportunity for Lufthansa Summary of Route Forecast



Connecting market  
potential over  
**Munich**

**1,282,100**

**Munich**

Point to point  
market

**30,300\***

Connecting market  
potential over **Taipei**

**803,700**

**Taipei**

Schedule Options: A350-900

Sector	Dep. Time	Arr. Time	Op. Days	Aircraft	Seats	Annual Seats	Annual Pax	Seat Factor
MUC-TPE	21:30	15:00	1 3 5 7	A350-900	293	121,888	101,154	83.0%
TPE-MUC	23:00	05:30	12 4 6	A350-900	293			

Note: AviaSolutions analysis. Source for aircraft configuration is Lufthansa's website



# Why Taiwan?

## Economy, Trade, Tourism

# Market Fundamentals

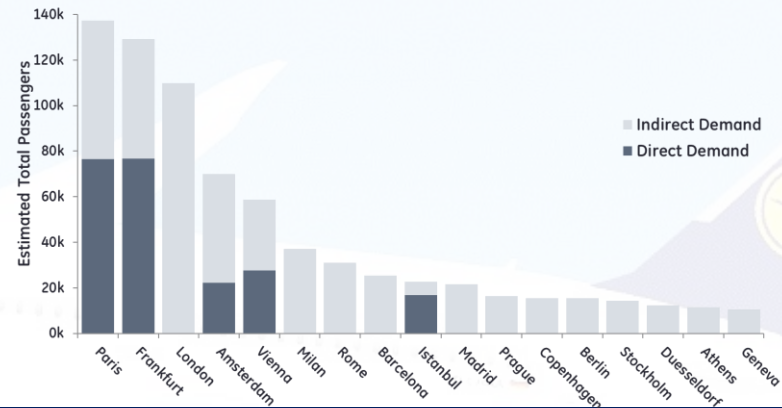
## Established Business and Tourism Market for Lufthansa to Serve

### Demand and Trends

- **Connecting demand beyond MUC**  
*Europe: 672,000*
- **High volume and premium market** between Taipei and Western Europe / North America
- High average one-way net business fares at over **\$1,300**
- Strong fit with **LH premium customers**

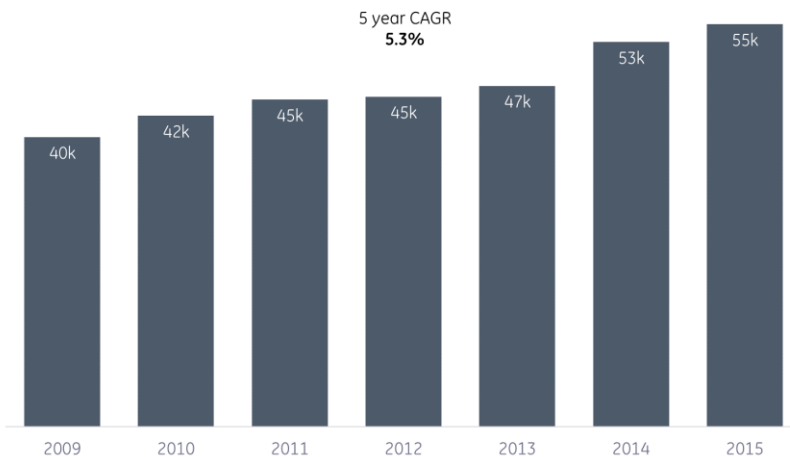
### Strong Demand to Europe

Top 15 European City Pair Markets From Taipei Beyond Munich  
Source: Sabre MI October 2015 - September 2016, AviaSolutions Analysis



### Increasingly Popular Tourist Destination

German Residents Visits to Taiwan  
Source: Tourism Bureau MOTC



### Established Germany-Taiwan Links

- **US\$14.6bn** bilateral trade in 2015
- Germany is Taiwan's **#1** European trading partner
- More than **230 German businesses** have activities in Taiwan
- **55,000** German visitors to Taiwan annually
- Taiwan-Germany **long-term cooperation agreement** on productivity to assist Taiwan manufacturing industry with German expertise
- Over **1,600** German citizens live in Taiwan

# Taiwan Ranks Highly as a Leading Global Destination



**#1 Remarkable Place for Solo Travel**

BuzzFeed (2014)

**#1 World's Best Food**

CNN Facebook Fan page (2015)

**#6 Emerging Tourist Destination**

Skyscanner global destination rankings (2016)

**#10 'Must See' Attraction – Taroko Gorge**

Virgin Travel Insurance rankings (2013)

**Top 10 Cycle Route Worldwide – Sun Moon Lake**

One of the world's most beautiful cycle paths, CNN (2012)

**#11 Tourist Site Worldwide**

New York Times ranking of 52 sites (2014)

**#16 Global City – Taiwan, MasterCard Worldwide**

Index of Global Destination Cities (2015)

**One of the Best Tourism Destinations**

Lonely Planet global rankings (2015)



# Enjoy Leisure, Entertainment and Tourism

## Easily accessible from TPE gateway

Explore **dramatic scenery** in several national parks like **Shei-Pa, Yangmingshan, Yushan and Taroko**



**SHEI-PA**  
NATIONAL PARK  
Republic of China (Taiwan)

Family friendly **beaches, luxury resorts** and **outdoor activities** including Kenting Beach



Experience Taipei's famous **night markets** and bustling street life



Discover **traditional architecture** and beautiful **historical sights**



# Recognised World Leader for Cycling Tours

Numerous Designated Routes including famous 29km **Sun Moon Lake** bike path



**Taiwan**  
THE HEART OF ASIA



VELO-CITY  
GLOBAL 2016  
EVOLUTION OF CYCLING  
FEB 27- MAR 1 TAIPEI, TAIWAN

City Government designed **dozens of cycle routes** to best experience Taipei's architecture, scenery, culture, wilderness, history, nature and street food

Very popular with **German** tourists



# Taoyuan Aerotropolis Development

Taiwan's largest ever development project



4,687 ha designated area – entire plan expected to be complete in **2023**

**300,000** job opportunities and **US\$77bn** economic benefit

Will enhance **international competitiveness of Taoyuan** and promote economic status of Taiwan

Shortest average flight time to the **major Asian cities** (2.55 hours)

Closely **linked** with the Northern Taiwan Metropolitan Area

Sea-air **dual port development** of the Taoyuan International Airport and Taipei Port





# Links Between Taipei and Munich



# Established Links With Germany

Taiwan and Germany enjoy frequent and close exchange in trade and investment, technology, culture, tourism and education

Established business and tourism market for **Lufthansa** to serve



Over **55,000 Germans** visited Taiwan in 2015  
Over **53,000 Taiwanese** visited Germany in 2015

Germany is Taiwan's **#1 European** trading partner;

Taiwan is **Germany's #5** trading partner in Asia;  
Two way trade reached **US\$14.6bn** in 2015

Taiwanese IT and IC manufacturing imports from Germany doubled in 2014 to **US\$983m** – making Germany **#7** largest market

**1,500** Taiwanese study in Germany;  
**250** German companies operating in Taiwan;  
**1,600** German citizens live in Taiwan;  
**177** German-Taiwanese university partnerships

Taiwan's investments in Germany grew **207%** in 2013 and reached **US\$77m** in 2015

Germany is Taiwan's **#2 foreign investor**; its investments grew **120%** (2013) and **340%** (2014)

# Public and Private Bodies Facilitate Bilateral Relations

Taiwan External Trade Development Council (TAITRA) is the main non-profit trade promotion organisation in Taiwan. Jointly sponsored by the government, industry associations and commercial organisations – with an active **Munich office**



German interests in Taipei are managed by the **German Institute Taipei**

Deutsches Institut  
Taipei  
德國在台協會

Other German institutions in Taiwan are **the Goethe Institute Taipei**, the **German Trade Office Taipei** run by the Association of German Chambers of Industry and Commerce (DIHT) and a **Germany Trade & Invest** office



German companies are active in **virtually all sectors in Taiwan**

Taiwan is highly interested in Germany's evolving **energy policy** and the accompanying development of **green technologies**

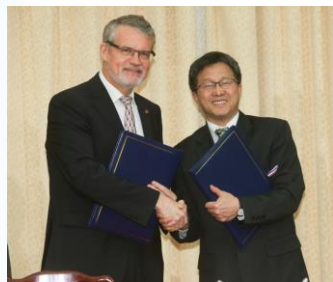
**5,400** secondary school students learning German in Taiwan, making German #4 foreign language taught after English, Japanese and French

**German courses** are offered at many universities and private language schools including the Goethe Institute Taipei

A **Taiwan-Germany working holiday program** was inaugurated in 2010 – promoting international exchange and developing Taiwan's tourism industry by granting **visas without the need for work permits**

# Taiwan is an Important Research Hub for German Firms

Taiwan is one of only three countries worldwide where **Manz Group** (Germany) is pursuing R&D activities;  
Manz acquired **Taiwan's Intech** in 2008 for **US\$55.8m**



December 2016 – a major **Taiwan-Germany agreement** was signed– **The Joint Declaration of Intent on Cooperation in the Field of Energy Transition** – focussing on renewable and green energy initiatives

The **world's largest supplier of automotive components**, Robert Bosch GmbH, currently has **four business operations in Taiwan**, including Robert Bosch Taiwan Co. Ltd., Bosch Rexroth Co. Ltd., Unipoint Electric MFG. Co. Ltd., and BSH Home Appliances Private Ltd

- Over **1,000** employees in Taiwan



In 2012, Germany's **Evonik Industries**, a global leader in specialty chemicals, opened its **first Advanced Project House "Light & Electronics"** at one of **Taiwan's leading research institutes** – the Industrial Technology and Research Institute in Hsinchu



German pharmaceutical and chemical company **Merck**, a leader in the field of performance materials with more than 2,500 patents, opened its **New Business R&D and Application Lab in Taiwan** in 2013



2016 - Germany's **Linde Group**, the world's largest industrial gas supplier by market share, invested more than **US\$5.5m** in a **new research facility located in Taiwan**

# Growing Cooperation Between Germany/Taiwan

**January 2017** – Germany government officials held industry talks in Taiwan

Discussed **bilateral green energy** and **industry 4.0 cooperation**, as well as various other related issues



ROC Deputy Minister of Economic Affairs received Dr. Eckhard Franz, director-general for Extended Economic Policy at the German Federal Ministry for Economic Affairs and Energy (12 January, 2017)

Taiwan has the **world's highest density cluster of machine tool industries** concentrated along the Dadu Plateau, christened the 'Golden Valley'

The region has over 1,000 precision machinery manufacturers and over 10,000 downstream suppliers

**3,00,000** jobs creating **\$3bn** revenue

Car components for several **German** manufacturers are made here

The Industrial Development Bureau (IDB) under the Ministry of Economic Affairs will establish a **long-term cooperation between Germany and Taiwan** to assist **Taiwanese companies embracing Productivity 4.0**

The **Taiwan-Germany Productivity/Industry 4.0 Forum** was held in NTUH International Convention Centre in 2016

Major German corporations were invited to collaborate with Taiwanese companies, **developing relationships between Germany and Taiwan's leading precision manufacturing industries**

**September 2015** – the ROC Ministry of Education and the Standing Conference of the Ministers of Education and Cultural Affairs of the Länder in the Federal Republic of Germany signed a **letter of intent on increasing cooperation in education**

**October 2015** – the ROC Food and Drug Administration signed a joint declaration with the German Federal Institute for Drugs and Medical Devices to **enhance bilateral cooperation involving drugs and medical equipment**

**March 2016** – Germany / Taiwan governments agreed to expand each side's annual quota for the **bilateral youth working holiday program** from 300 to 500 persons

**September 2016** – Germany / Taiwan governments signed a **letter of intent** enhancing **bilateral cooperation in high tech-related fields**

# Shared Interests – Munich and Taipei are Tech Cities

## Munich, Bavaria – A European Silicon Valley

**Bavaria** is home to hundreds of biotech, IT and environmental technology firms that have emerged in the past 20 years

For over two decades, **Munich** has had Germany's highest share of technology patents by population

**Munich** has circa 27,000 ICT and Media firms with €70B annual revenue

Bavaria is Germany's most prosperous state and has the lowest unemployment rate

Implementing and managing digitization has formed a cornerstone of German policy-making



# Munich, Bavaria – Biotech and Pharma Cluster



The European Metropolitan Region of Munich is home to the **most important Biotechnology location in Germany** – circa 270 companies from the biotech and pharma sector provide **~20,000 jobs**

Circa **350 Life Science companies**, including 118 small and medium sized enterprises

Location benefits in particular from close interaction between **academic research** and the **biotech industry** – **90.000 students** in Munich

**Two elite universities: Ludwig-Maximilians-Universität and Technische Universität München**  
**3 medicinal-biological Max Planck Institutes**  
**2 incubators (innovation and start-up centers) specialising in biotechnology**

**Campus Martinsried-Großhadern**

- 1** Innovations- und Gründerzentrum
- 2** Max-Planck-Institut für Biochemie
- 3** Max-Planck-Institut für Neurobiologie
- 4** Biozentrum der LMU
- 5** Universitätsklinikum Großhadern, LMU
- 6** Departments für Chemie und Pharmazie der LMU
- 7** ZNS-Forschungszentrum
- 8** Hämatologikum, Helmholtz Zentrum München
- 9** Institut für Neuropathologie
- 10** Genzentrum, LMU
- 11** Biomedizinisches Zentrum, geplant 2014
- 12** Forschungszentrum Demenz, geplant
- 13** Biotech-Unternehmen

Quelle: Innovations- und Gründerzentrum Martinsried GmbH

# Taiwan Tech – The Asian Silicon Valley

Globally recognised brands contribute to a **\$130bn tech sector**



## Tech sector

contributes over **20%** to Taiwan's GDP

Taiwan's National Development Fund and Ministry of Science and Technology are funding **\$120m venture capital for tech start-ups**



## Hsinchu Science and Industrial Park

One of the oldest tech industry parks in Asia generates **\$31bn** per year

## Taoyuan Start-Up Hub

Helps start-ups with existing R&D and manufacturing capabilities





# MUC-TPE Market Background

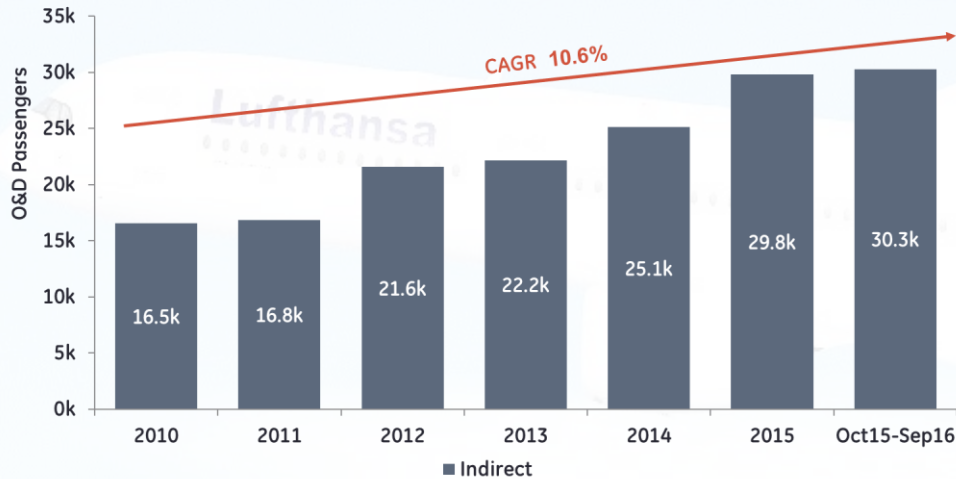


# Market Background

## Point to Point Traffic

Taipei - Munich Point to Point O&D Traffic 2010-2016

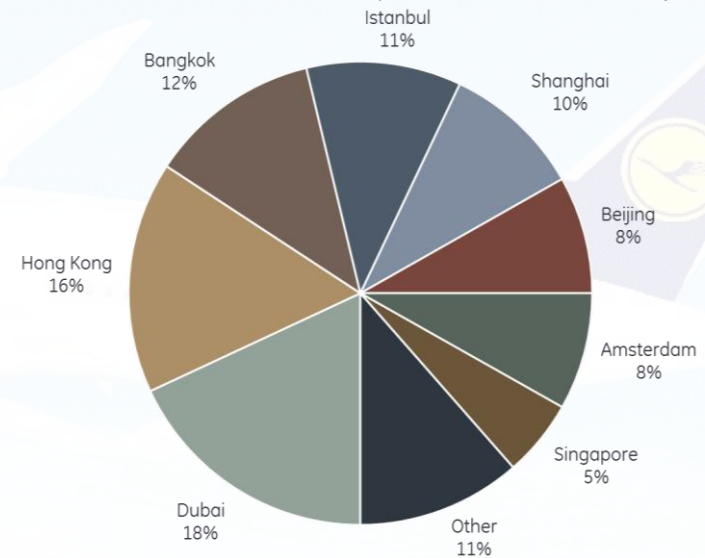
Source: Sabre MI 2010-2016, AviaSolutions analysis



Indirect traffic increased by **10.3% CAGR** 2010-2016  
**30.3k** passengers flew indirectly between Taipei and Munich (Sabre MI data year ending September 2016)

Major Connecting Points for Demand Between Munich and Taipei

Source: Sabre MI October 2015 - September 2016 & AviaSolutions analysis



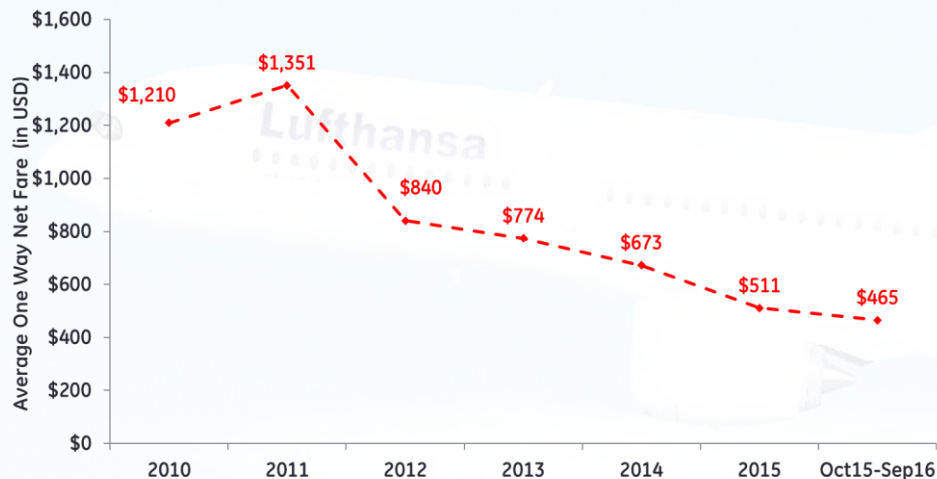
Several hubs share indirect traffic connecting Taipei and Munich  
 Dubai (**18%**) provided the most connections followed by Hong Kong (**16%**) and Bangkok (**12.0%**)

# Market Background

## Point to Point Fares

### Taipei - Munich Point to Point Fares 2010-2016

Source: Sabre MI 2010-2016, AviaSolutions analysis

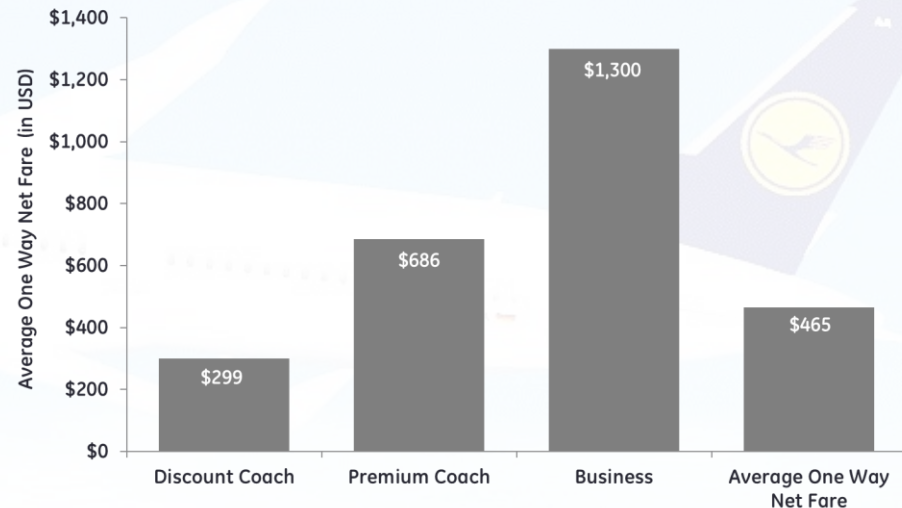


Average O&D one way net fares between Taipei and Munich declined from **\$1,351** in 2010 to **\$465** in 2016 (Sabre MI data year ending September 2016)

Increased competition over hubs with lower fares has led to increased demand

### Taipei - Munich Point to Point Fares by Class

Source: Sabre MI September 2015 - October 2016, AviaSolutions analysis



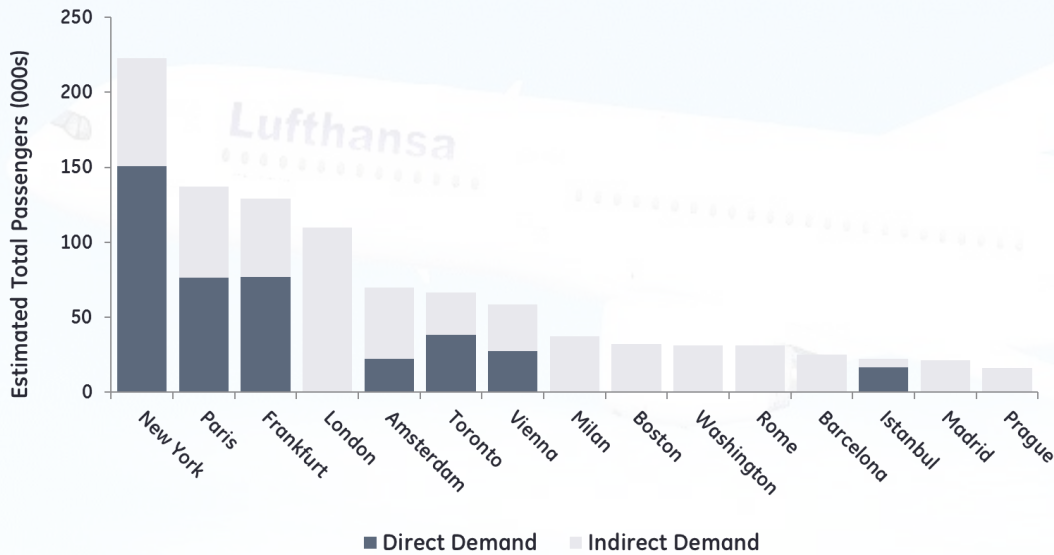
Average O&D one way net fares between Taipei and Munich show low fares in Coach (**\$299**) and high fares in Business (**\$1,300**)

# Market Background

## Connecting Traffic from Taipei beyond Munich

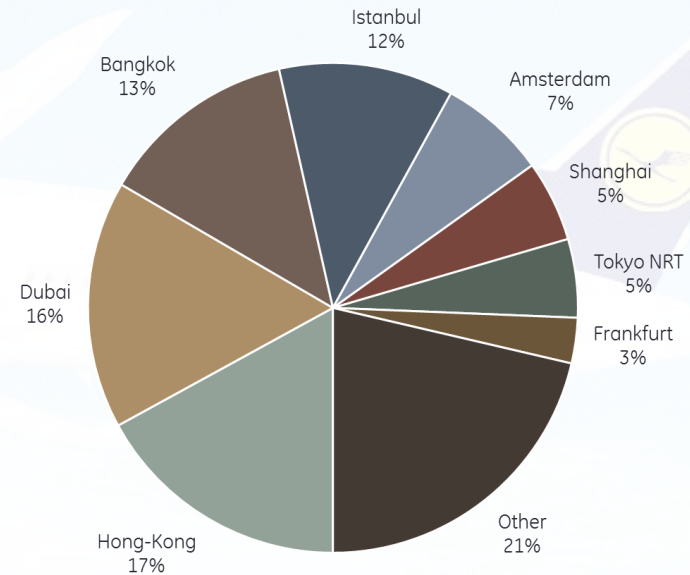
Top 15 City Pair Markets From Taipei Beyond Munich

Source: Sabre MI October 2015 - September 2016 & AviaSolutions Analysis



Taipei Cities beyond Munich - Major Connecting Points

Source: Sabre MI October 2015 - September 2016 & AviaSolutions analysis



Largest markets from Taipei beyond Munich are **New York**, **Paris** and **Frankfurt**

Several hubs share indirect traffic connecting Taipei with destinations beyond Munich

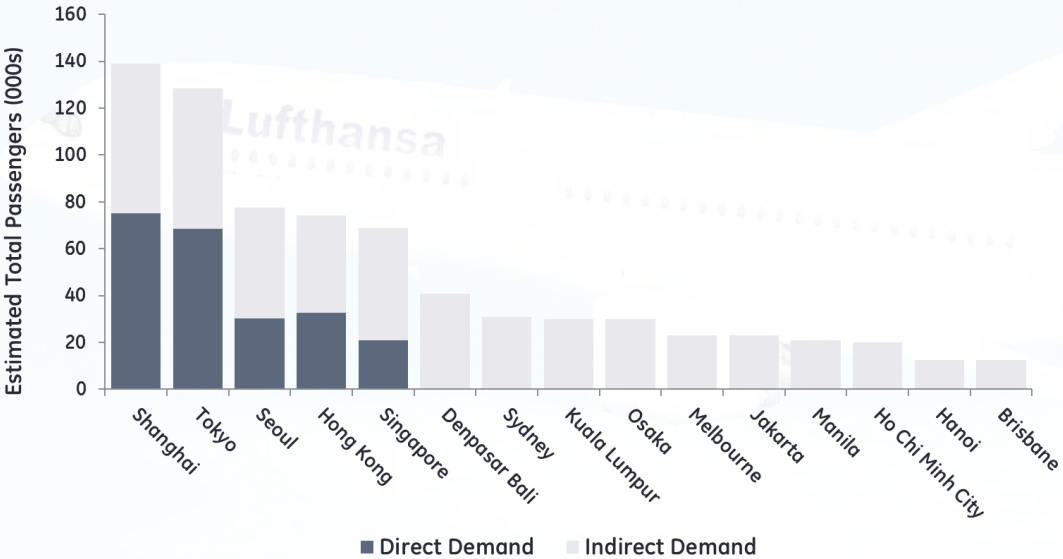
From Taipei to destinations beyond Munich, Hong Kong (**17%**) is the main connecting point followed by Dubai (**16%**) and Bangkok (**13%**)

# Market Background

## Connecting Traffic from Munich beyond Taipei

Top 15 City Pair Markets from Munich beyond Taipei

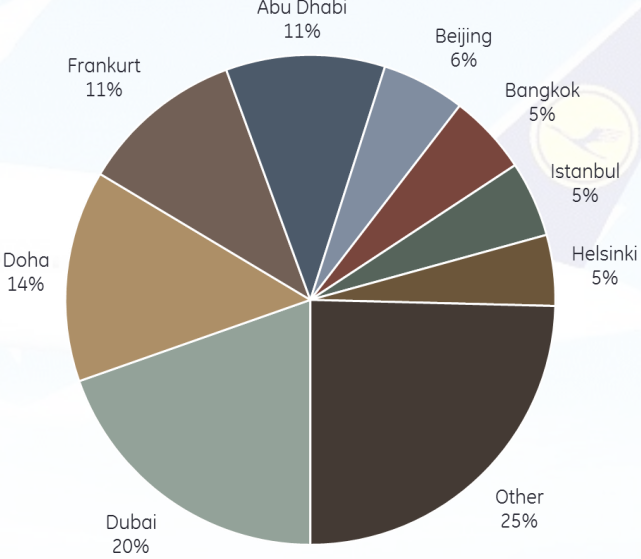
Source: Sabre MI October 2015 - September 2016 & AviaSolutions Analysis



Largest markets from Munich beyond Taipei are **Shanghai**, **Tokyo** and **Seoul**

Munich to Cities beyond Taipei - Major Connecting Points

Source: Sabre MI October 2015 - September 2015 & AviaSolutions analysis



Several hubs share indirect traffic connecting Munich with destinations beyond Taipei

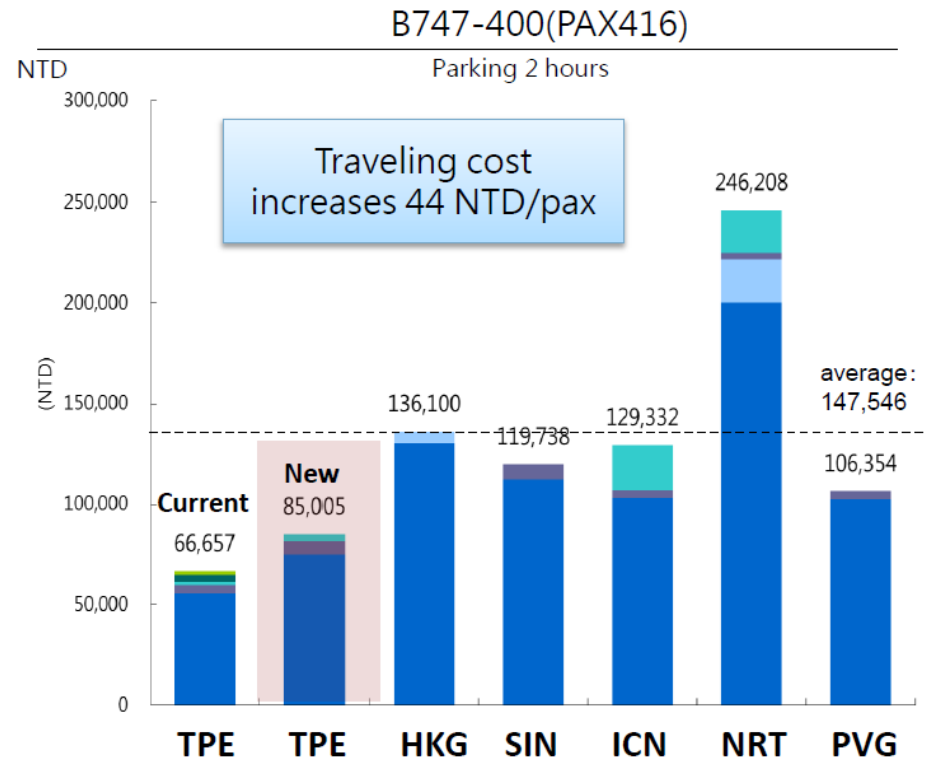
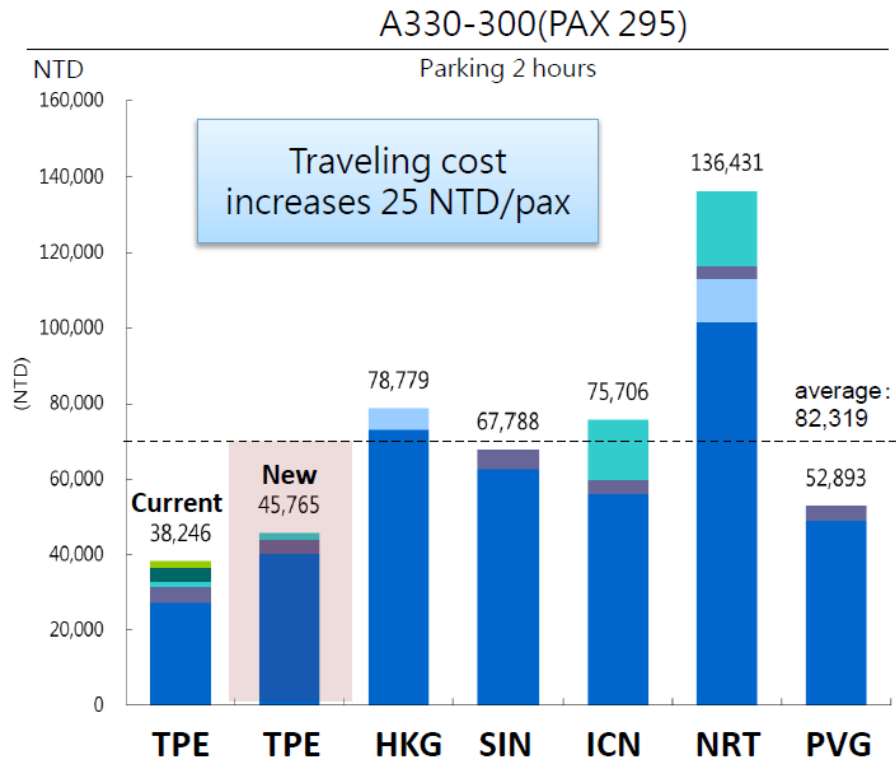
From Munich to destinations beyond Taipei, Dubai (**20%**) is the main connecting point followed by Doha (**14%**) and Frankfurt (**11%**)



# Taoyuan International Airport

# TPE Airport Charges

New rate setting will not surpass average charges of main East Asian airports



- Landing charge
- Parking charge
- Boarding Bridge
- Automatic Baggage Handling System Fee
- Terminal Building Service Charge
- Ground Handling Area and Facilities Charge
- GPU charge
- A.C (air conditioner)

# TPE Marketing Support Program

## TTIA New Airlines and Routes Promotion Incentive Programs

Program aims to invite new air carriers to operate and develop new routes at TTIA

Candidates categories:

**Category 1** - New air carrier entrant, operating regular flights from TTIA

**Category 2** - Newly opened regular direct route to TTIA

**Category 1** should be air carriers that have not operated on any route at TPE.

**Category 2** routes should not have been opened for the last two years before application.

Qualified candidates have marketing opportunities in TTIA's official social media, internet media and print media.

TTIA New Airlines and Routes - Promotion Incentives Program



Media	Content	Times	Comments
TPE Social Media	Facebook post	Chinese and English content + pictures	Airlines should provide TIAC with marketing content 14 days before inauguration flight. TIAC reserves the right to edit any submission.
	Instagram post	English content + pictures	
	Twitter post	English content (less than 140 words)	
Internet Media	Major portals, news websites, social forums	Chinese message less than 1000 words	1. No specified position or date should be appointed. 2. Marketing content should be submitted to TIAC no later than 45 days before publication. 3. TIAC reserve the right to revise the submission that is to be published.
Print Newspapers	Major newspapers	Chinese message less than 200 words	
Print Magazines	Financial and travel magazines	Full page advert	Twice 1. Airline logo and city image of the new route should be submitted to TIAC in A1 format. TIAC will complete the artwork production and arrange the media exposures which airlines select 2 media candidates from the media list. 2. TIAC reserve the right to revise the submission that is to be published.

# TPE Marketing Support Program

## Application Procedure



**Lufthansa Route Certificate** (issued by CAA, MOTC)  
**Promotion Materials**

*Submission*



Taoyuan Airport  
Taiwan

**Business Planning and Marketing Department of TIAC**  
amanda0603@mail.taoyuan-airport.com

*Marketing evidence  
one month after  
promotion materials  
release*



Program expires on **31 December 2017**.

TIAC will revise the budget execution and effectiveness to extend program.

Program takes effect after official announcement.

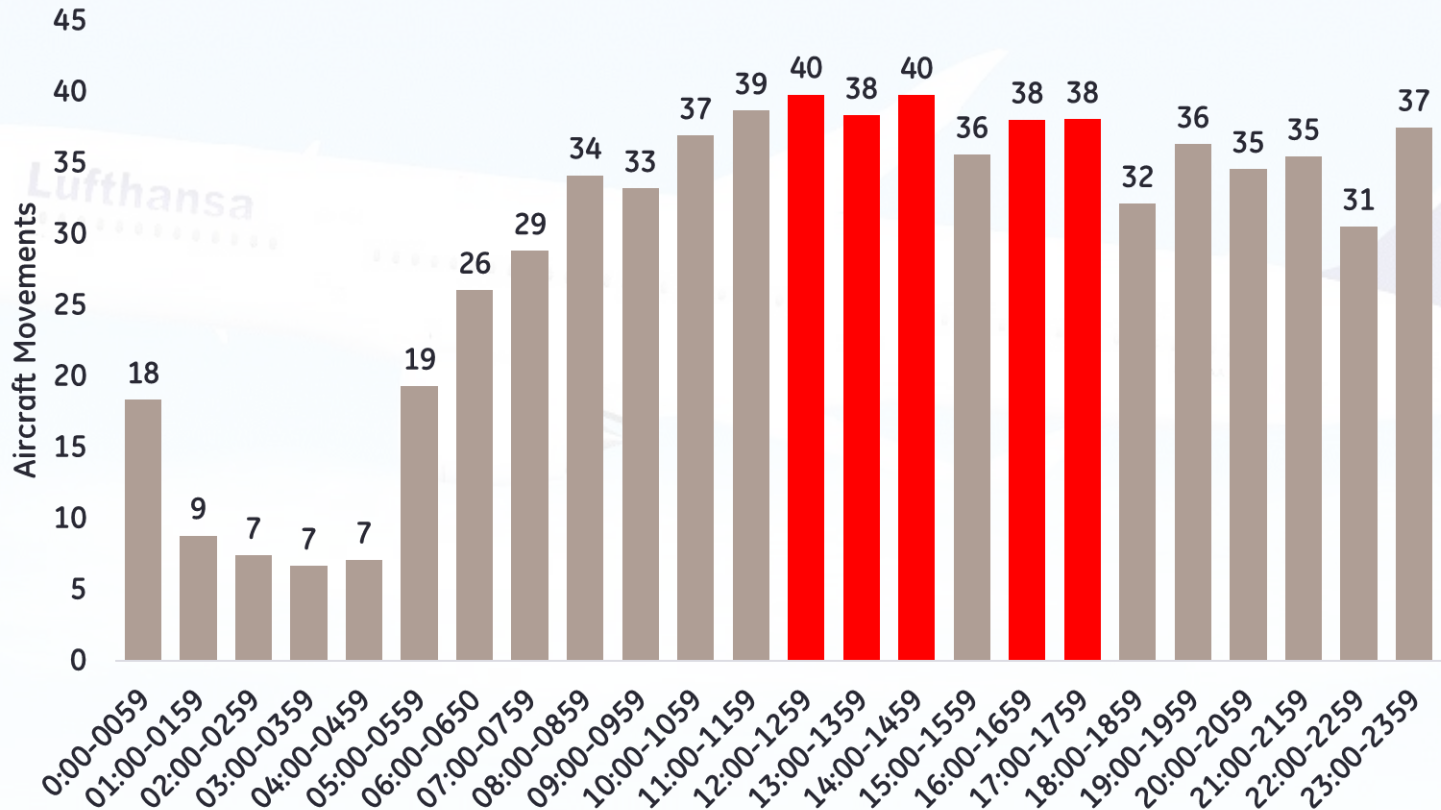
TIAC has the right to extend, revise program.



# TPE Slot Availability

## TPE Aircraft Movements - Daily Average

Source: Taoyuan International Airport, February 2017



Peak hour **12:00 – 15:00** and **16:00 – 18:00**

Capacity of **50** movements per hour and **90** movements in **2** consecutive hours

# New TPE Terminal 3 under Construction

A world class hub for East Asia

State of the art world-class  
T3 facility opening 2020

45mppa initial capacity with  
26 boarding gates



# Steps to Commence Operations at Taipei

**Decision to**  
start operations



Taoyuan Airport  
Taiwan

*Contact CAA for  
official  
permission to  
operate at TPE*

**Application for**  **Lufthansa**

- Air Route Certificate
- Application for Station Manager Office, if applicable

*Discuss  
operations  
with TIAC*

**Confirmation on**

- Terminal choice
- Check-in counter arrangement
- Boarding gate arrangement
- IT & communication system
- Office rent agreement
- Other administration issues

**Contact Person**

Ms. Annie Lee

TEL: +886-3-273-5370

FAX: +886-3-273-5322

Email: [anniepalee@mail.taoyuan-airport.com](mailto:anniepalee@mail.taoyuan-airport.com)





**Choose TPE**

# Unique Opportunity to be the first German Carrier in Taiwan

## TPE would be delighted to discuss this opportunity further with Lufthansa in Taipei

- TPE is ideally located as a **transfer hub for Lufthansa** - Munich service
  - to SE/NE Asia
- Substantial demand from Taipei beyond Munich – to **Europe 672,000**
- Substantial demand from Munich beyond Taipei – to **SE/NE Asia 404,800**
- Over **55,000 Germans** visit Taiwan annually and over **53,000 Taiwanese** visit Germany
- Established and strong **Munich-Taiwan links**
  - trade & investment, technology, research & development, tourism and education
- Germany is Taiwan's **#1** European trading partner and **#2** foreign investor
- **250 German companies** have activities in Taiwan
- Both Munich and Taipei are major **Tech Cities**
- **TPE Award winning airport** customer service and range of facilities
- **High volume** and **premium market** between Taipei and Europe



Thank You



Lufthansa



## Contact

**Mr Tim Yuan-Hung Ting**

Senior Manager Business Planning & Marketing Development

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Taoyuan City 33758, Taiwan R.O.C

Tel: +886 3 2735555

Email: [yhting@mail.Taoyuan-airport.com](mailto:yhting@mail.Taoyuan-airport.com)

The Lufthansa logo, featuring the word "Lufthansa" in a bold, sans-serif font, with a stylized crane in flight above it. The logo is positioned on the side of a white airplane fuselage.

Lufthansa

