

ICEX

**INVESTIN
SPAIN**



EMBAJADA DE ESPAÑA
OFICINA ECONÓMICA Y COMERCIAL DE CANTÓN
西班牙驻华大使馆广州经济商务处



西班牙航空工业——投资和商业合作的良机

THE SPANISH AVIATION INDUSTRY
OPPORTUNITIES FOR INVESTMENT AND BUSINESS COOPERATION



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THE SPANISH AVIATION INDUSTRY

OPPORTUNITIES FOR INVESTMENT AND BUSINESS COOPERATION

1. 西班牙经济概况 **THE ECONOMY OF SPAIN**

2. 西班牙航空工业 **THE SPANISH AVIATION INDUSTRY**

3. 主要商机 **THE KEY BUSINESS OPPORTUNITIES**

4. 双边合作 **THE BILATERAL COOPERATION**

5. 结论 **CONCLUSIONS**



西班牙主要政治经济指标

Main Political and Economic Indicators of Spain

西班牙自 1977 年起实行议会君主制，至今政治体制稳定。

Parliamentary monarchy since 1977. Spain enjoys political and institutional stability

西班牙是地方政府享有高度自治权的一个国家，全国共划分为 17 个自治区和 2 个自治市。

Highly decentralized state with 17 autonomous communities and 2 autonomous cities.

西班牙从 1986 年起成为欧盟成员国之一。

Member of the European Union since 1986.

西班牙总人口数达 4700 万，主要城市包括马德里（首都）、巴塞罗那、瓦伦西亚、塞维利亚、萨拉戈萨。

Population of 47 million inhabitants. Main cities: Madrid (capital), Barcelona, Valencia, Sevilla, Zaragoza.

西班牙是欧盟的第 4 大经济体，世界第 14 大经济体，GDP 达 1.4 万亿美元。

Spain is the 4th largest economy in the EU and 14th largest in the world with a USD 1.4 trillion GDP.

它还是世界第 11 大服务贸易出口国和第 17 大货物出口国。

11th largest exporter of commercial services and 17th exporter of goods.

第 13 大外商投资目标国和第 13 大外商投资来源国。

13th largest destination of foreign investment and 13th largest source of foreign investment

西班牙的主要产业包括汽车工业、医疗技术、化工、造船、旅游业和纺织工业。

Main industries: automotive, medical technology, chemicals, shipbuilding, tourism, and fashion.



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“西班牙是少数几个能够开发飞机整机的国家之一”

“Spain is one of few countries able to develop a whole aircraft”

美国贸易部认为西班牙是航空航天领域技术最先进的国家之一。西班牙航空业从概念、设计到制造、维护，涵盖了飞机的全价值链。

The Department of Trade of the USA considers Spain as one of the most highly advanced industries in aeronautics and aerospace. Spanish aeronautics cover the whole value chain of an aircraft, from concept and design to manufacturing and maintenance.

全球定位

航空工业在欧洲排名第5，全球排名第8

GLOBAL POSITION
#5 Aeronautic Industry in Europe and #8 worldwide

产值

116 亿欧元

REVENUE
EUR 11.6 billion

出口

47%收入来自国外市场

EXPORTS
47% of industry income comes from foreign markets

就业

直接创造
47600个岗位

EMPLOYMENT
47,600 direct jobs



西班牙公司成为全球龙头的行业

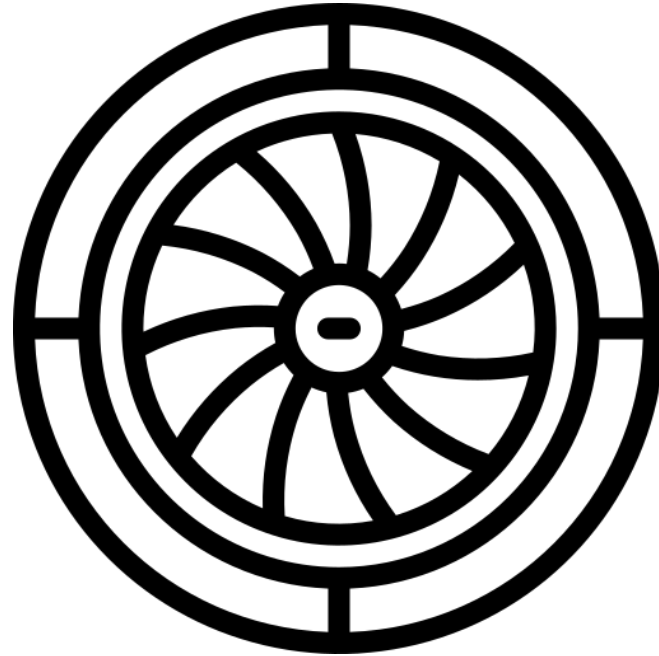
Sectors where Spanish companies are global leaders

行业构成

- ✓ 79% 飞机结构和系统
- ✓ 11% 飞机装备
- ✓ 10% 飞机引擎

INDUSTRY COMPOSITION

- ✓ 79% aerostructures and systems
- ✓ 11% equipment
- ✓ 10% motors



复合材料

Composite materials

低压涡轮发动机

Low pressure turbine engines

空中交通管理系统

Air traffic management systems

军用运输和特殊任务飞机

Military transport and special mission aircraft

保养、维修和运营

Maintenance, repair and operation activities



西班牙航空业的竞争优势

The competitive advantages of the Spanish aviation industry

M. Porter的钻石模型

各国可以利用自身可用的因素，而政府可以充当催化剂，以改善一个国家在全球竞争性经济环境中的地位。

M. Porter's Diamond Model

Nations can exploit factors available to them and governments act as catalysts to improve a country's position in a globally competitive economic environment.

企业战略
结构、竞争

Firm Strategy,
Structure and
Rivalry



企业战略：主要参与者

Firm Strategy: Main players in the Spanish aviation industry



企业战略：西班牙三个地区集中了业内75%的企业

Firm Strategy: 3 regions concentrate 75% of the industry



企业战略：全球行业领导者的垂青

Firm Strategy: The presence of global industry leaders

AIRBUS

- 西班牙与德国、法国一起成为空中客车的联合创始国。
Spain is one of the three founding nations jointly with Germany and France
- 空中客车在西班牙国内产值 46 亿欧元，拥有超过 12700 名员工，其中 7,700 名在民用项目工作。
EUR 4.6 billion in domestic revenue. More than 12,700 employees of which 7,700 work in civil programs.
- 空中客车在西班牙设有 3 个主要的民航中心（分别位于 Illescas、Getafe、Puerto Real），1 个复合材料的卓越中心。它们负责 A380、A350、A350 XWB、A330 和 A320 等机型关键部件的生产建造。
3 main civil aviation centers (Illescas, Getafe, Puerto Real). Excellence Center for Composite Materials. Key parts of the construction programs for aircrafts A380, A350, A350 XWB, A330 and A320.



- 波音公司在西班牙成立已超过 85 年。
Boeing has been established in Spain for more than 85 years.
- 波音公司在西班牙创造了 5,000 个工作岗位。
5,000 job positions generated by Boeing programs in Spain.
- 西班牙公司作为供应商参与波音公司的商业计划（9 家 1 级，22 家 2 级）。
Spanish companies participate as suppliers to Boeing's comercial programs (9 Tier 1, 22 Tier 2).
- 波音公司自 2002 年起在马德里设立了“欧洲研究与技术中心”。
European Research and Technology Center in Madrid since 2002.



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要素条件：政府支持

Factor conditions: Government support

航空航天复兴、转型和弹性计划——细分行业及对应的公共资助

Aerospace Recovery, Transformation and Resilience Plan – Actions and public funds



- 零排放飞机、无人机和航空系统 Zero-emissions aircraft, UAV and aeronautic systems
- 无人机实验飞行中心 Experimental Flight Centre for UAVs – CEUS
- 航空研究平台 Aerial Research Platform
- 促进单一欧洲天空发展的措施 Measures to facilitate the development of the Single European Sky
- 航空运输便利措施 Measures to facilitate the aerial transport

323 M€



- 小型卫星发射器 Small satellite launchers
- 用于量子通信的卫星系统 Satellite systems for quantic communications
- 西班牙用于安全和国防的地球观测系统 Spanish Earth observation system for security and defense
- 欧洲航天局中的西班牙份额 Spanish share for the European Space Agency
- 西班牙航天局 Spanish Space Agency

1.480 M€



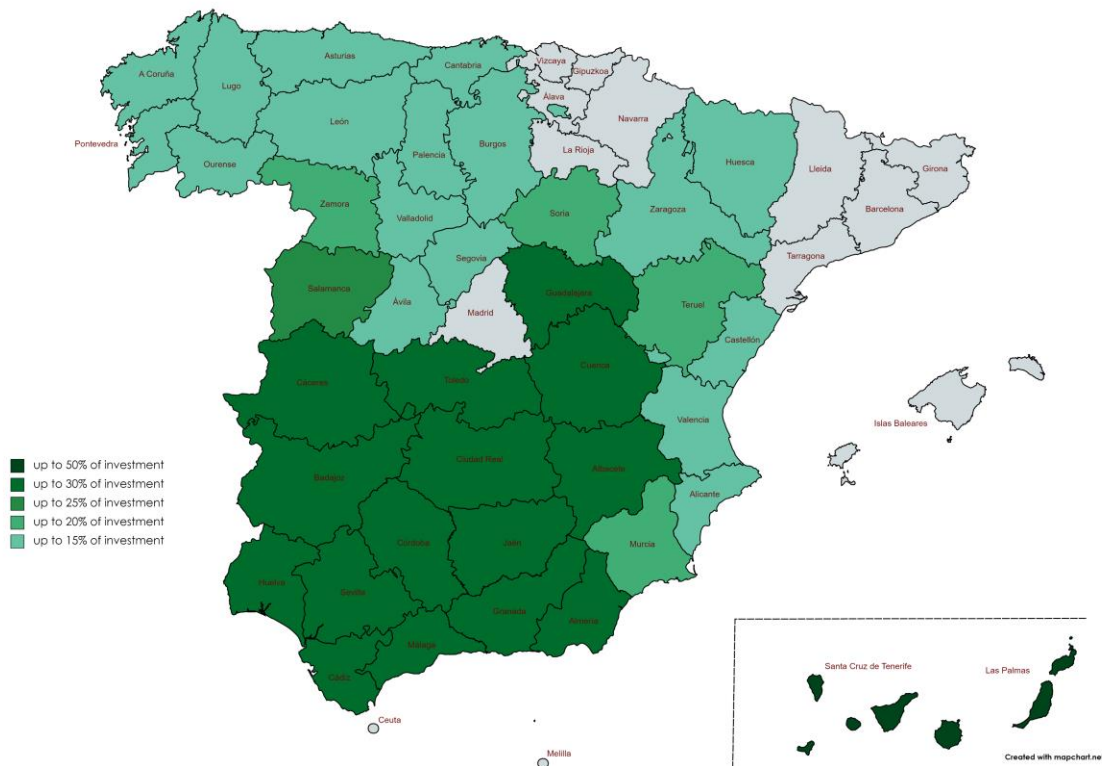
- 辅助研发计划（与西班牙地方政府一起） Complementary R&D&I Plans (together with the Spanish Regions)
- 训练 Training
- 工厂环境中的可持续性和数字化 Sustainability and digitalization in factory environments
- 西班牙国家工业技术发展署自下而上对航空航天领域的支持 Bottom-up support to the aerospace sector by CDTI
- 航空航天投资计划 Aerospace Innvierte programme
- 航天创新生态系统 Aerospace innovation ecosystem

390 M€



要素条件：区域投资激励措施

Factor conditions: Regional incentives to investment



- 西班牙政府补贴 15% 到 50% 的生产性投资。小型和中型投资者的投资补贴比例还相应地会有 20% 和 10% 增加。
The Government of Spain subsidizes from 15% to 50% of productive Investments. The percentage of investment subsidized is higher for small and médium sized investors (20% and 10% respectively).
- 补贴的力度大小取决于投资的地区，西班牙大部分地区都有资格获得补贴。
Thought the intensity of the aid depends on the location of the investment, most of the Spanish territory is eligible for subsidies.
- 在欧盟允许的范围內，投资补贴可以与其他补贴相结合，用于创造就业机会、工人培训、投资研发等。
Investment aid can be combined with other aid for job creation, worker training, investment in R&D, etc., up to the limits permitted by the European Union..



要素条件：政府支持和适中税收

Factor conditions: Government support. Moderate Tax Burden

25%
企业所得税税率
Corporate Income Tax Rate

针对投资、创造就业和研发活动方面实行的激励性的税收减免政策，降低有效税率。

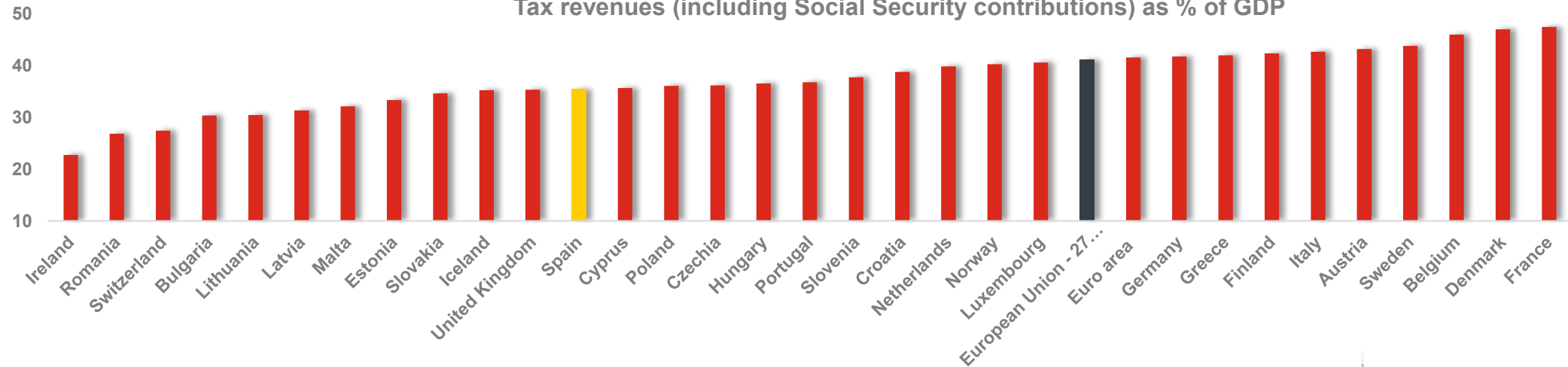
Lower effective rate based on taxes allowances on incentives reductions from investments, employment and R+D activities

国际分析表明，西班牙是一个税收收入（包括社会保障缴款）与国民生产总值之间的比例相对适中（占GDP 35.4%）的国家。

The International analysis shows that Spain is a country with relatively moderate ratio between Tax Revenues (Including Social Security Contributions) and GDP (35.4% GDP).

欧洲地区税收收入（包括社会保障缴款）占 GDP 的百分比情况比较

Tax revenues (including Social Security contributions) as % of GDP



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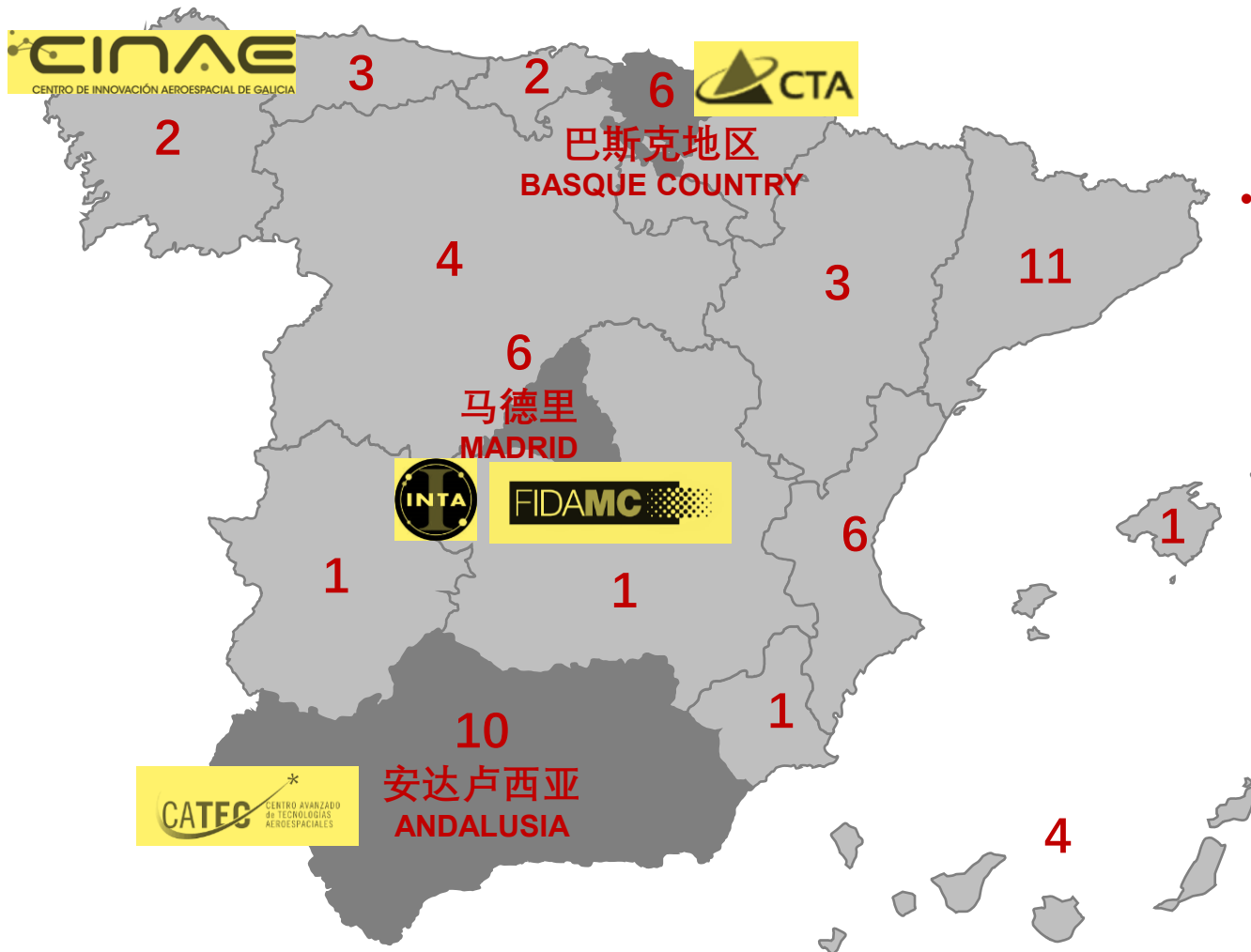
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配套产业：研发基础设施

Supporting and related industries: R&D infrastructure



- 西班牙总共有61个科技园区，当中共有约8000家企业。
Spain has 61 scientific and technological parks that host approximately 8,000 companies.

- 西班牙航空航天业每年在研发上投资 12 亿欧元（约占总收入的 10%）。
Spanish aerospace industry invests EUR 1.2 billion annually on R&D (10% revenue).

- 西班牙拥有下列专注于航空航天业的高品质研发中心：
Spain counts on a number of high-quality R&D centers focused on aerospace.

- ✓ CTA 航空技术中心
- ✓ CATEC 航天技术前沿中心
- ✓ CINAIE 加利西亚地区航天创新中心
- ✓ INTA 国家航天技术研究所
- ✓ FIDAMC 复合材料研究基金会

- ✓ CTA Centro de Tecnologías Aeronáuticas
- ✓ CATEC Centro Avanzado de Tecnologías Aeroespaciales
- ✓ CINAIE Centro de Innovación Aeroespacial de Galicia
- ✓ INTA Instituto Nacional de Técnica Aeroespacial
- ✓ FIDAMC Fundación Investigación Materiales Compuestos



配套产业：机场基础设施

Supporting and related industries: Airport infrastructure

- 西班牙有 47 个活跃的机场用于商业航班起降。
Spain has 47 active airports with comercial flights.
- 西班牙拥有欧洲 10 个最繁忙的机场中的 2 个。
马德里 - 巴拉哈斯机场和巴塞罗那机场每年的乘客接待量分别达到6100万和5200 万人次。
Spain has 2 of 10 busiest airports in Europe. Madrid-Barajas and Barcelona handle 61 and 52 million passengers every year.
- 西班牙公司也是机场管理领域的领导者。西班牙机场管理局（Aena）和西班牙法罗里奥集团（Ferrovial）是世界上大型的机场运营商，其中后者为英国伦敦希思罗机场的管理方。西班牙公司还在全球许多机场提供其他机场服务，例如货物装载和免税店。
Spanish companies are also leaders in airport management. Aena and Ferrovial (Heathrow) are among the largest aiport operator in the world. Spanish companies provide other airport services, such as handling and duty-free stores in many airports worldwide.



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需求条件：全球市场准入

Demand conditions: Global market access

欧盟内部市场：

- ✓ 世界上最大的经济体和消费市场
- ✓ 货物、服务、资本、劳动力的自由流动
- ✓ 成员国的关联协议

European Union internal market:

- ✓ Largest economy and Consumer market in the world
- ✓ Free movement of goods, services, capital, workers
- ✓ Association agreements with candidate countries

与拉丁美洲联系最紧密的经济体

- ✓ 与美国并列成为拉丁美洲地区第一大投资方
- ✓ 和区内国家保持最频繁的航班往来
- ✓ 和区内国家有10项投资保护协议
- ✓ 和区内国家有19项避免双重征税协议

Most connected economy to Latin America

- ✓ #1 Investor in Latin America jointly with USA
- ✓ #1 air connections to Latin America
- ✓ 10 Investment protection agreements
- ✓ 19 double taxation agreements

通往北非和中东的门户：

- ✓ 和区内国家有8项欧洲-地中海协会协议
- ✓ 和区内国家有18项投资保护协议
- ✓ 和区内国家有21项避免双重征税协议

Gateway to North Africa and Middle East:

- ✓ 8 Euro-Mediterranean Association Agreements
- ✓ 18 Investment protection agreements
- ✓ 21 double taxation agreements



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与中国企业的主要商机

Main Business Opportunities for Chinese Companies

1. 航空对经济复苏具有战略意义。2020年3月，西班牙政府宣布航空航天业为战略性行业，计划在2022-2025年动用45亿欧元支持其发展。

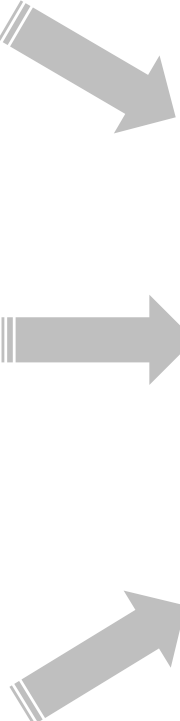
1. Aviation is strategic for economic recovery. The Government of Spain has declared the aerospace sector as strategic and plans to mobilize EUR 4.5 billion in support for 2022-2025.

2. 需要更省油的飞机。更换燃油效率较低的飞机的市场机会值得注意。市场对创新燃料技术、智能机翼、先进座舱等有需求。

2. Need for more fuel-efficient aircraft. Market opportunities to replace less fuel-efficient aircraft are noteworthy. There is demand for innovate fuel technologies, smart wings, cockpit advances, etc.

3. 军费增加。西班牙承诺到2024年将军事预算增加到GDP的1.53%，并承诺为最紧迫的需求提供108亿欧元。

3. Increase in military spending. Spain has committed to increase military budget to 1.53% GDP by 2024 and pledged EUR 10.8 billions for the most urgent needs.

- 
1. 飞机系统和发动机的电气化
 2. 新型混合动力和电力推进器的影响研究
 3. 先进飞机制造
 4. 先进的复合材料
 5. 有数字和模拟技术参与的先进制造和设计
 6. 多功能结构用于提高维护效率、导电性和抗冲击性
 7. 物联网和智能汽车
 8. 无人驾驶汽车
 9. 高效、静音和可持续的发动机
 10. 空气动力学优化
 11. 使用数字化和大数据的新服务支持系统
 12. 开发空中交通管理系统以优化时间和飞行安全
 13. 非推进能量优化

1. Electrification of aircraft systems and engine
2. Research on the impact of new hybrid and electrical propulsion
3. Advanced manufacturing aircraft
4. Advanced composite materials
5. Advanced manufacturing and designing with digital and simulation techniques
6. Multifunctional structures to improve maintenance, conductivity and impact resistance
7. Connected and intelligent vehicles
8. Unmanned autonomous vehicles
9. Efficient, silent and sustainable engines
10. Aerodynamic optimization
11. New service support systems using digitalization and big data
12. Development of ATM systems to optimize time and flight safety
13. Optimization of non propulsion energy



与中国企业的主要商机

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西班牙航空公司非常愿意与外国供应商合作，但这个过程需要耐心、财务准备、创新方法和有竞争力的价格。

建议通过投资直接进入西班牙。

最好的融入策略是与现有的当地公司建立合作伙伴关系。

Spanish aviation companies are very open to cooperate with foreign suppliers, but this process requires patience, financial effort, innovative approach, and competitive pricing. A direct presence in Spain through investment is recommended to support this approach. The best entry strategy is to enter into a partnership with an existing local company.



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通过在西班牙投资开展合作

Cooperation through investment in Spain

西班牙投资促进局提供全面的帮助，涵盖投资者的所有需求，包括法律、财务、劳工、运营和市场调查

INVEST IN SPAIN offers integral assistance covering all the needs of investors, including legal, financial, labour, operations and market research

提供全程支持与服务
从项目选址到招聘

Door-to-door support services from
location advice to recruitment

与国家及地方政府部门沟通的单一窗口

Single window to communicate with
national, regional and local
administrations

给投资者提供投后服务

Continuous support to longstanding
investors through aftercare services



通过在西班牙投资开展合作

Cooperation through business partnerships

西班牙驻华大使馆广州经济商务处致力于推广西班牙作为投资目的地国家，向中国企业及投资者在西营商
与投资提供服务

The Economic & Commercial Office of Spain in Guangzhou promotes Spain as a business destination and follows up on the needs of Chinese investors doing business in Spain

商务与投资专业团队

Team of specialized trade and investment experts

为中国企业在西班牙设立提供支持

Provide support to Chinese companies established in Spain

推广西班牙产品、技术、服务

Promote Spanish products and technologies and business cooperation



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结论

Conclusions

1. 西班牙是少数几个能够从概念、设计到制造、维护开发飞机整机的国家之一。
Spain is one of few countries able to develop a whole aircraft, from concept and design to manufacturing and maintenance.
2. 西班牙公司在复合材料、低压涡轮发动机、空中交通管理系统、军用运输机和维护保养服务方面处于领先地位。
Spanish companies are leaders in composite materials, low pressure turbine engines, air traffic management systems, military transport aircraft, and maintenance activities.
3. 西班牙航空业的成功是许多国内因素的结果，这些因素提高了在西班牙制造的国内外公司的竞争力。
The success of the Spanish aviation industry is the result of many domestic factors, that boost the competitiveness of domestic and foreign companies that manufacture in Spain.
4. 西班牙为中国的航空从业者提供了很多机会，但进入市场需要耐心和努力。非常推荐通过投资直接进入西班牙。
Spain offers many opportunities to Chinese aviation companies, but entering the market requires patience and effort. A direct presence in Spain through investment is very recommended.
5. 西班牙投资促进局（**INVEST IN SPAIN**）可以提供全面的协助，满足投资者的所有需求。西班牙驻华大使馆广州经济商务处是中国企业通过投资或商业合作方式走进西班牙的第一个联络点。
INVEST IN SPAIN offers integral assistance covering all the needs of investors. The Economic and Commercial Office of Spain in Guangzhou is the first contact point for Chinese companies to establish in Spain through investment or business partnerships.



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THANK YOU FOR YOUR ATTENTION

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