

## The 150 Seat Battle Commences

Now the 150-seat battle begins in earnest. The long haul, high capacity struggle has been resolved with the Airbus A380 at the top, Boeing 777 at the bottom and a new version of the old faithful 747 filling gaps. The middle market has been resolved into a struggle between the B787 and A350. Now for the next fight.

Somehow the 150 seat, single aisle airliners don't carry the charisma of the B787 Dreamliner or the A380 megaliner. They're smaller and cheaper. But there are thousands of them and they're the ones we all know. The A320 and B737 variants have made short haul air travel cheap for all of us. They're the tools of the Low Cost Carriers. Ryanair have 272 B737-800s and easyJet have a similar number of A320 variants.

Now the Malaysian LCC, Air Asia, has ordered 200 A320neos at the Paris Air Show in June. NEO stands for New Engine Option and is the crystallisation of months of argument between the manufacturers and airlines about how much new technology should be in the next generation. Of course, the media are alive with dramatic claims about how Boeing should have done the same and has missed the boat. Certainly Airbus has got off to a good start but the two majors are in different situations.

The Airbus A320 is a much more recent basic design, having first flown in 1987. The only major changes have been shortening and stretching for different markets in the form of the A318, A319 and A321. Consequently Airbus did not need a new design for the next generation. A substantial upgrade would suffice. That is the A320neo (which has other goodies as well as the new engines).

The B737 flew in 1967 (and has commonality with the 1954 vintage B707). Then the B737-100 and -200 were the last of the first generation short-haul jets (remember the BAC 1-11 and DC-9?). It survived because it was wide enough to stretch and it has been upgraded twice. The -300/400/500 introduced the CFM-56 engine and other features and widened its market spread. The -600/700/800 and 900 introduced winglets and other features and widened its market spread still further.

What next? Boeing and the airlines probably agree that the B737 has gone far enough and Boeing need a "clean sheet of paper" design. The debate seems to be whether Boeing should go straight to a new design or do a limited upgrade of the B737 and follow it to a later timescale with an even more advanced new design. I suspect Boeing would like to get the new 787 established in service before committing themselves to this "bet my company" risk.

Meanwhile the "upstarts" are lurking in the wings (no pun intended). The smaller aircraft firms would not have contemplated the bigger classes of aircraft but now they are eyeing this vast market enviously, and some of them have lower costs. Embraer of Brazil and Bombardier of Canada (the former Canadair and de Havilland Canada) are already in the 80-130 seat market. Bombardier is committed to its C-series. Ryanair has already signed an "acknowledgement of acceptability" of the C919 from China. Sukhoi, the great Soviet era fighter producer, is pushing its Superjet. And Mitsubishi has appeared.

On 20th July American Airlines moved this great question forward by ordering 460 "narrowbodies". However, since they divided their order not only between Boeing and Airbus but between current and new variants of both (i.e. 130 A320s, 130 A320neos, 100 current B737s and 100 new variant B737s) it raises more questions about American Airlines' strategy than anything else. At least now we can expect an interim B737 before any new model (although it has still to be authorised by the Boeing board). Watch this space.

**John Caton**  
**CTG committee member**