Four shades of Open Skies: European Union and four main external partners

Abstract:
The Open Skies agreements are in the centre of the European Union's external aviation policy. They form the basis of liberalization of aviation between the EU and the rest of the world, opening up markets and promoting fair competition. The progress made since the original road map in 2005 depended both on the priorities of the European side and the individual strategy of each external partner. This paper discusses the status of the EU's aviation relations with four important partners: USA, Russia, Morocco and Turkey. Market opening is at a different stage of maturity in the four examples. The evolution of traffic over time can give an insight into the impact that gradual liberalization had in each case: total traffic grows faster when restrictions are lifted, but new demand is not spread equally across airports on either side. The impact on concentration, measured with the Herfindahl-Hirschman Index (HHI) at airport level, varies significantly between the various markets. Political, geographic, demographic and economic factors influence the airline network dynamics and lead to distinct patterns of expansion. Special emphasis is given to the analysis of the role of airline alliances, ownership limitations and specific obstacles such as the visa limitations and the Siberian overflight royalties.

URI:  

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Publication Year:  
2015  
Science Areas:  
Energy and transport  

Keywords:  
competitiveness  
impact assessment  
transport  

Publisher:  
ELSEVIER SCI LTD  
ISSN:  
0966-6923  
DOI: