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Consolidation in the air transport sector and antitrust enforcement in Europe

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Abstract

The paper aims at analysing the role for Antitrust intervention in the light of the consolidation trend of the airline industry in Europe. The almost full liberalization in the aviation sector (at least for intra-community routes) led to a situation where, at the same time, (i) new players have been entering the market with an increase in competition (actual and potential) on EU routes, and (ii) deep forms of co-operation (alliances and code sharing) and integration (mergers) have been exploited to better perform at national and international level. The paper highlights the economic analysis behind Antitrust assessment in the evaluation of mergers and cooperation agreements in the air transport sector. Consolidated standards for market definition, competitive assessment and feasible remedies are presented and discussed in the light of the relevant EU case law. Moreover, according to the radical changes occurring in the industry – i.e. the emergence of peculiar market forces such as low cost carriers and their interaction with traditional full service carriers – some preliminary considerations are introduced on the likely need for adjusting the assessment criteria for an effective Antitrust intervention.

Keywords: Airline Industry, Antitrust, Consolidation

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