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## **Airports and Low Cost carriers in the Era of Airline Deregulation: the Sicilian case**

*The whole paper has been jointly discussed and developed by the authors. Nevertheless, sections 2, 3 and 4 are by Fabio Carlucci, sections 1, 5 and 6 are by Andrea Cirà.*

## **IMPRESSUM**

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## **Abstract**

Over the last few years, the European liberalization and deregulation processes have involved all aspects of the air transport activity, producing significant change to the supply side of the air transport market. All the European air companies have tried to expand their market share, efficiency, and above all, they have tried to specialise their activity focusing on specific demand targets. As a consequence, even airports have had to change their management activity, increasingly modifying their strategy to attract new carriers and plan new goals, such as, for example, increasing accessibility.

The aim of this work is to analyze the Italian air transport market after the deregulation process, and its implications for airports, in particular in peripheral areas such as Sicily. This paper is set out as follows. After the introduction, the second section illustrates the consequences of airline liberalization on the Italian market. The third part describes the regulation of airports. In the fourth section, we examine the influence of the low-cost experience on airport competition. The study ends with a look at Sicilian airports. The conclusions provide indications useful to authorities who need to make decisions regarding the enhancement or construction of new regional airport infrastructures.

# 1. Introduction

Public intervention in the transport sector is a widely debated theme in the literature of economics. The frequent occurrence of competitive situations incompatible with the requirements of an efficient allocation process for economic resources caused by a high degree of concentration in the industrial market, the social relevance of the investments that need to be made, the widespread presence of externalities, the inefficiency of the market structure, which, in turn implies “low efficiency-oriented” industry, are the main causes contributing to greater public sector involvement in the transport sector.

Since the early days, the European air transport sector has always been subject to tight control from the economic and social points of view. In other words, for economic, political and social reasons, European air transport has developed within a monopolistic and heavily regulated system, with the national companies enjoying a high degree of government protection.

Only in the late 80’s did Europe see a process of gradual liberalization<sup>1</sup> which began to allow the operation of competitive mechanisms in terms of the contestable market, according to the theoretical approach developed by Baumol, Panzar and Willig (1982) and on which the deregulation of U.S. air transport has been based.

In Europe, the will to benefit from the great potential of the free market has led, on one hand, to a trend towards a progressive reduction of “red tape”, thus favouring the free interplay of economic forces, while on the other hand, there is greater involvement of venture capital in activities predominantly carried out by public companies.

The deregulation of the aviation market is a process that involves the area of travel itself, mainly the carriers, the area concerning slot allocations<sup>2</sup> and airport charges<sup>3</sup>, as well as the ground handling market<sup>4</sup>. Indeed the “regulatory asymmetry” between infrastructure activity and flight activity in the strict

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1 The “deregulation packages” were released by the European Commission in 1987, 1990, and 1992.

2 In the European Union this area is disciplined by Regulation EC No 793/2004 of the European Parliament and of the Council of 21 April 2004 amending Council and Regulation (EEC) No 95/93 on common rules for the allocation of slots at Community airports, OJ L 138, 30.04.2004, p. 50-60.

3 In the EU this area is disciplined by Directive 2009/12/EC of the European Parliament and of the Council of 11 March 2009, OJ L 70, 14.03.2009, p. 11-16.

4 In EU this area is disciplined by Council Directive 96/67/CE, O J L 272, 25.10.1996, p. 36-45.

sense, may jeopardize the achievement of the main aim of deregulation, which entailed developments in air transport and a higher degree of economic efficiency. For this reason, airport facilities in Europe have also been affected by processes of deregulation and privatization with different degrees of dependence on local situations.

In summary, the deregulation of air transport has increased airline competition and placed airports in a competitive environment (Barros, Dieke, 2007). Here, we aim to analyze the case of the Sicilian airport system.

## **2. The air transport liberalization process and management of airports in Italy**

In the air transport sector, travel activities can be regulated according to three principles, based on differing interpretations of the relationship between air space and the national territory. In fact, international air traffic can be regulated by multilateral national agreements, bilateral national agreements and bilateral agreements at regional level.

Multilateralism is based on the “open skies” principle whereby the legal status of the skies can be equated to that of international waters (Turco Bulgherini, 1984), in which shipping is free.

“National Bilateralism” is the practice whereby the negotiation concerning air transport should take place between pairs of States, where the principle of full sovereignty of the State prevails over the airspace above its territory.

With the development of new economic areas and supranational policies it is now possible to draw up agreements not only between individual countries, but also at a broader level. In Italy, the process of liberalization of air transport has followed the same route as Europe’s, but even if domestic legislation has substantially acknowledged the provisions of the European Union, the growth of a competitive market has been slowed down due to the paucity of private capital in the airline industry.

In January 2009 the privatization process of the main national carrier, Alitalia, was completed. It should be noted that in the field of airports, full privatization is not easily achievable, and particular problems concerning airport management and plant capacity allocation mechanisms come to light in the field of air transport infrastructures.

At the moment, the Italian legal framework envisages different management patterns for the airport sector. These are the “total management” pattern where, upon payment of a fee, the aerodrome and air terminal, in other words

the total airport infrastructure, are entrusted to a dealer for a period of time not exceeding forty years. In this case, the concessionaire is responsible for ground handling, the construction of new infrastructures and the ordinary and extraordinary maintenance of the existing ones. The second kind of airport infrastructure management pattern, known as “partial management”, makes the public administration responsible for the management of the infrastructure, while the air station and the land side services are entrusted to a concessionaire.

Finally, in “direct management” the air carrier deals with the ground handling directly, while the public administration handles all the activities concerning new buildings and the maintenance of airport facilities.<sup>5</sup>

Of course, the total management contract is the most attractive for the airport handler; for this reason, in view of a more open market; we can assume that at national level other forms of management will gradually disappear.

Traditionally, Italy’s airport infrastructures have been considered as public interest goods, and have therefore been entrusted to companies whose capital is largely owned by the State or local authorities, with heavy consequences on financial and operational performance.

### **3. The regulation and deregulation of airport infrastructure**

Transport infrastructures needs to be regulated not only to avoid market failures, but also taking into account political and social considerations.

Sometimes, the State may act in response to requests for protection coming from groups with an interest (such as enterprises, consumers, etc.) which push the Government to adopt specific measures.

From a regulatory point of view, the notion of essential facility falls within the scope of article 82 EC Treaty, which generally pre-empts the possibility of abuse of a dominant position in all situations where you can “limit production, or market opportunities, damaging the consumers”.

In Italy, the aviation authorities identify four types of players that interact in the aviation sector and which may be subject to a system of privatization and liberalization: the airport concessionaire, the air carrier, also when it performs ground-handling services, and finally, air traffic control and supervision (ENAC). Flight navigation control is not included in this list, because it is considered that this activity must remain under the direct public control of a na-

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5 Law 537 of 24 December 1993, concerning „Integrations to Public Finance“; Ministerial Decree 521 (Minister for Transport and Navigation) of 12/11/1997 , implementing law of 24/12/1993 no. 537; Directive of Minister for Transport of 12/9/2007.



tional body (ENAV) for safety reasons.

For the regulation of air transport terminals, different solutions have been identified, ranging from direct management and administration to private management that can be carried according to specific taxation and administrative regulations ordered by the public authority.

In Italy, direct management is the formula used for most airports. After an initial phase when management was entrusted to the Ministry of Transport, it was preferred to transfer these competencies over time to specially created public companies which were later transformed into joint stock companies, the majority of whose capital is wholly, or partly, controlled by the State or local authorities.

Although airport privatization is now common in Europe, very few airports in Europe's peripheral areas are private (Halpern, Pagliari, 2007).

Nevertheless, the air transport sector deregulation process could lead to an improvement in the use of public and private resources if certain basic conditions are met.

Firstly, we must outline that the objectives of the deregulation of business travel are different from those pursued by the recovery of the market economy in the airport sector, particularly in the field of infrastructure investments. In this context, indeed, the processes of deregulation must create the necessary conditions so that private companies can be persuaded to invest their capital in the implementation and management of airports.

Besides the presence of a current or potential demand, the construction or enlargement of an airport also requires a real prospect of investment recovery comparable in terms of timing and risks to the alternatives offered by the financial market. To this end, the system of rules imposed by the State constitutes a basic element on which the profitability of investments may depend, and therefore acts as a catalyst for new capital needed by the infrastructure supporting aviation activities.

Therefore, since air transport requires a huge amount of capital to construct the infrastructure, upgrading the market economy through deregulation can only be achieved by attracting private capital for projects to develop new airports or the expansion of those already in operation.

#### **4. The impact of low cost airlines on the organization of the terminals**

Analyzing the territorial distribution of airports in Italy, we can see how the location of these infrastructures has been dictated by military requirements or the desire to provide an airport site for all urban centres.

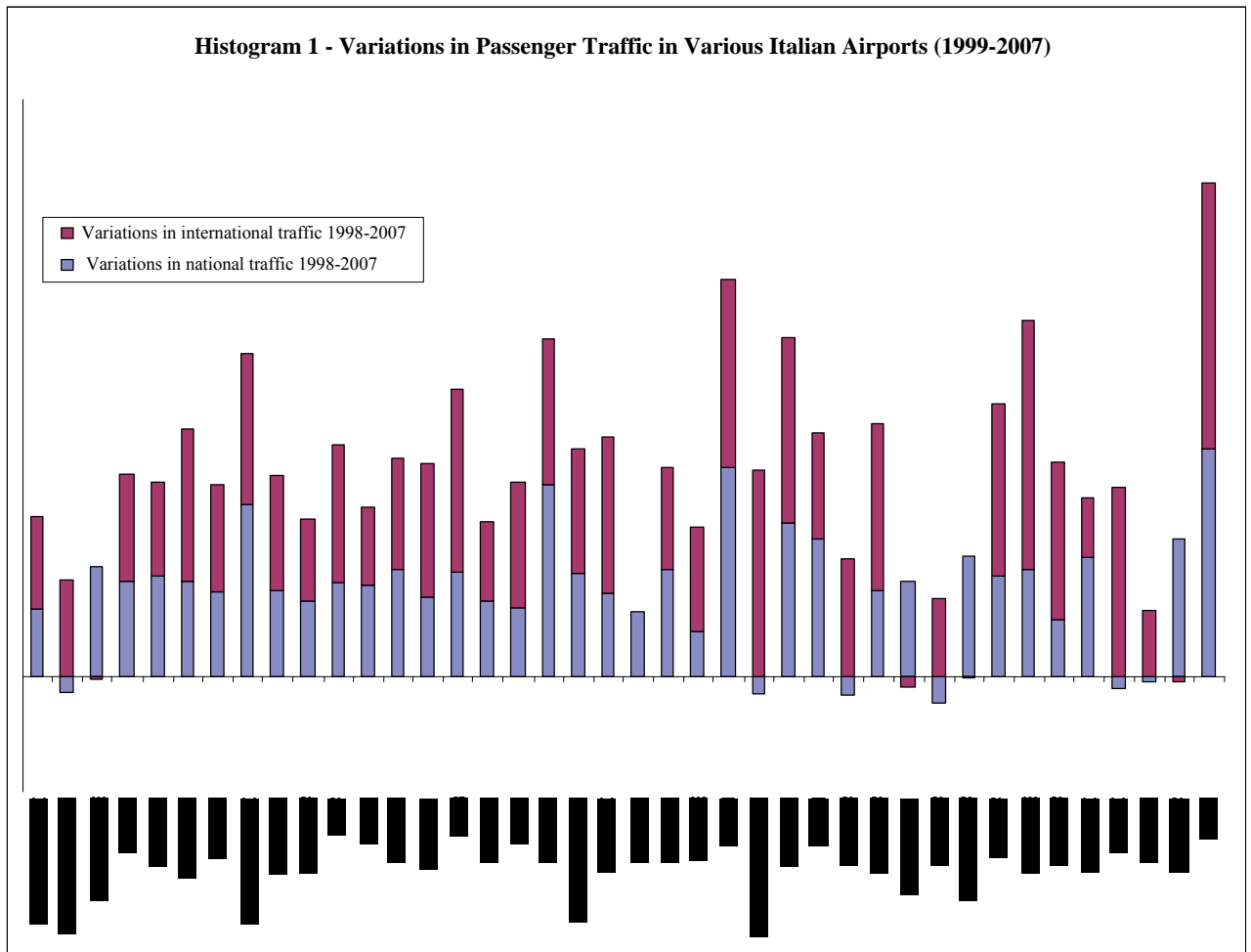
Transformation has occurred relatively recently in the air transport sector, from an economic, regulatory and environmental point of view, and has revealed new needs regarding both the territorial distribution of airports and infrastructure capacity. The qualitative and quantitative adjustment of airport capacity has only occasionally led to changes to the infrastructures with a view to creating new sites or to a substantial expansion of existing ones.

The reduction of administrative burdens in the air transport market has shown itself to be an innovative element consisting of a strong interest by airport companies in meeting the needs of airline companies for services offered by the airports they manage. Recently, we have noticed that most intercontinental airport sites have adopted management strategies aimed at substantially matching the supply of services to the needs of the major international carriers, where regional airports tend to reinforce relationships with low cost carriers through commercial partnerships.

In this area we have to include the theme of the role of airport infrastructures in supporting local economies, and in particular in supporting the economic integration of peripheral areas. The traffic of goods and passengers is certainly a factor that acts positively on competitiveness and local development, improving economic, social and territorial cohesion.

The deregulation of air transport in the EU has enabled the birth of new carriers, some of which have developed their own networks concentrating on some airports which, even in comparison with the main currents of traffic, have the advantage of a good degree of capacity still available and an excellent potential in terms of catchment areas. In this regard, it should be outlined that the increase in traffic in the peripheral airports has not entailed the reduction of the flow of goods and passengers to and from the main airports. In other words, the strategies adopted by low cost carriers have shown, also in Italy, the potential of the air transport market, which is not exploited because of the lack of competitiveness in comparison with modes of surface transport.

The traffic data (Histogram 1) for the period from 1999, when the low-cost market was just starting out, to 2007, the year in which the phenomenon became well established, show that the smaller airports made the most significant increase.



*Data Source: ENAC (Ente Nazionale per l'Aviazione Civile)*

A further confirmation of the role played by the low cost supply in enhancing the secondary airport phenomenon comes from an analysis (table 1) of the percentage composition of the national airport traffic served prevalently by liner services.

Table 1 - Figures for the Air Traffic Composition for Various Italian Airports  
(Years 2004 and 2007)

AIRPORT	TOTAL PASSENGE RS 2004	LOW COST PASSENGERS 2004	LOW COST % 2004	TOTAL PASSENGERS 2007	LOW COST PASSENGE RS 2007	LOW COST % 2007	LOW COST $\Delta$ % 2004- 2007
ROME CIAMPINO	2,540,854	2,298,457	90.46	4,933,487	4,858,991	98.49	8.03
BERGAMO ORIO AL SERIO	3,312,550	2,172,702	65.59	5,226,340	4,431,414	84.79	19.20
ROME FIUMICINO	27,608,482	795,124	2.88	29,726,023	2,523,739	8.49	5.61
PISA	2,013,293	927,323	46.06	3,002,621	1,854,719	61.77	15.71
VENICE	5,838,008	601,899	10.31	6,268,649	1,542,715	24.61	14.30
TREVISO	884,268	808,133	91.39	1,328,318	1,292,985	97.34	5.95
CATANIA	5,075,433	709,038	13.97	5,370,411	1,692,754	31.52	17.55
MILAN LINATE	8,944,991	867,664	9.70	9,692,652	1,111,747	11.47	1.77
PALERMO	3,758,285	444,981	11.84	4,246,555	1,278,638	30.11	18.27
NAPLES	4,608,083	554,352	12.03	5,083,675	1,222,624	24.05	12.02
FORLI	808,031	517,705	64.07	621,228	588,551	94.74	30.67
ALGHERO	991,633	345,386	34.83	1,068,015	489,578	45.84	11.01
MILAN MALPENSA	18,421,598	152,899	0.83	21,619,797	1,965,240	9.09	8.26
BOLOGNA	2,867,315	125,302	4.37	3,954,544	463,077	11.71	7.34
OLBIA	1,532,717	125,223	8.17	1,761,888	387,792	22.01	13.84
BARI	1,722,523	222,033	12.89	1,951,936	507,503	26	13.11
TURIN	2,612,459	247,661	9.48	3,300,378	319,807	9.69	0.21
BRESCIA	339,034	175,009	51.62	225,470	148,697	65.95	14.33
BRINDISI	753,706	156,243	20.73	817,312	249,607	30.54	9.81
PESCARA	329,711	175,934	53.36	333,036	177,575	53.32	-0.04
GENOA	1,041,000	148,655	14.28	1,070,448	176,624	16.5	2.22
TRIESTE	638,529	111,040	17.39	665,426	123,037	18.49	1.10
ANCONA	497,306	105,329	21.18	469,700	112,446	23.94	2.76
CAGLIARI	2,271,829	0	0.00	2,464,084	156,223	6.34	6.34
VERONA	2,612,459	32,917	1.26	2,933,672	208,877	7.12	5.86
LAMEZIA TERME	1,265,153	0	0.00	1,341,936	226,921	16.91	16.91
FLORENCE	1,483,938	3,710	0.25	1,518,960	58,936	3.88	3.63
TRAPANI				313,798	32,321	10.3	10.30

Data Source: Conto Nazionale delle Infrastrutture e dei Trasporti (Italian Transportation Account)

Furthermore table 2 shows that the low-cost phenomenon in Italy is better developed for international flights. This is for two reasons. Firstly, since the majority of low-cost carriers belong to other European countries, they plan their flights to provide a higher frequency of connection to their bases, and secondly, this type of offer is more inclined to meet the needs of tourist traffic which is price sensitive and whose destination is mainly abroad.

*Table 2 – Italian Market (Passengers 2006): Low Cost Carriers (%) vs. Full Services Carriers*

Services	National Passengers (Figure)	%	International Passengers (Figure)	%	Total Passengers (Figure)	%
Low-Cost	7,055,349	13.39	21,349,971	30.37	28,405,320	23.10
Full Services	45,622,940	86.61	48,942,052	69.63	94,564,992	76.90
Total	52,678,289	100.00	70,292,023	100.00	122,970,312	100.00

*Data Source: Conto Nazionale delle Infrastrutture e dei Trasporti (Italian Transportation Account) and ENAC (Ente Nazionale per l'Aviazione Civile)*

There are different reasons why low-cost carriers prefer smaller airport facilities. The main ones depend on the potential of the catchment area, on the absence of congestion phenomena, prices, and on the characteristics of the airport's management (Potter, Warnock-Smith, 2005).

Deregulation and the economics of low cost airlines have led to a market orientation of European airports.

It should be noted that for a short time most of the airport management companies focused their management efforts on non-flight-related activities in order to improve financial performance. In Europe, the share of commercial revenues (non-flight-related) of the total has grown in recent years, reaching a value close to 45% and in some cases, generally at the larger airports, even attaining a value close to 80%. This is due to the prevailing trend of managing commercial activity efficiently in order to achieve an increase in the profitability of management as a whole. Furthermore, the increased time spent by passengers in the airport, caused by more security checks after "11 September" has led to an increase in spending in the shops located in the terminals.

This trend has transformed the traditional airport management model, based on the relationship between the airline company and the airport, into a more complex model in which passengers and the operators of commercial activities play a primary role.

In this scenario it is necessary to reflect on the changes introduced in civil aviation by the development of the low cost phenomenon that resulted, at the same time, in a considerable development of the smaller airports as well as in a decrease in flight-related revenues. In fact this relatively new type of carrier has created a sort of competitive mechanism, not only in the field of business travel, but also in the terminal activities segment, which has resulted in a reduction in the cost of services provided by airport operators interested in attracting new traffic.

The low-cost phenomenon has contributed to the growth of smaller airports: for example Stansted and Luton airports have been chosen as bases, by Ryanair and easyJet respectively.

Low-cost carriers, in particular the larger ones, diversify their supply of services focusing their network on different secondary airports, which are the main source of traffic. This leads to a clear asymmetry between the two partners, that benefits the airline company in terms of bargaining power (Barbot, 2006). This situation, together with a low tendency to spend which characterizes this type of carrier, means that the increase in airport traffic volume resulting from the use of airports by low-cost airlines is not translated automatically into an increase in revenue, as shown by Francis and other Authors (Francis, Humphreys, Ison, 2004).

In addition to exercising considerable market pressure in order to ensure that the rights granted for landing, departure, parking and admission of the aircraft are included, unlike full service airlines companies, the low-cost ones don't require high value added services, such as reserved areas for business traffic, acceptance and service for high quality luggage or special equipment for embarking or disembarking passengers. In order to maximize the efficiency of resources, the low cost airlines use the airport space for a time which is lower than full service carriers. According to these considerations it is clear that low-cost traffic is translated in an increase in revenues for the company only in large airports, which means that marginal costs are limited. For these reasons, several airport companies have stipulated very beneficial agreements with carriers operating in the low cost segment. But it is crucial that the excess capacity characterises both the segment of aeronautical activities and non-aeronautical services, otherwise the marginal cost of the entire production process could be higher than its marginal revenue, with obvious negative consequences on the budget of the airport company.

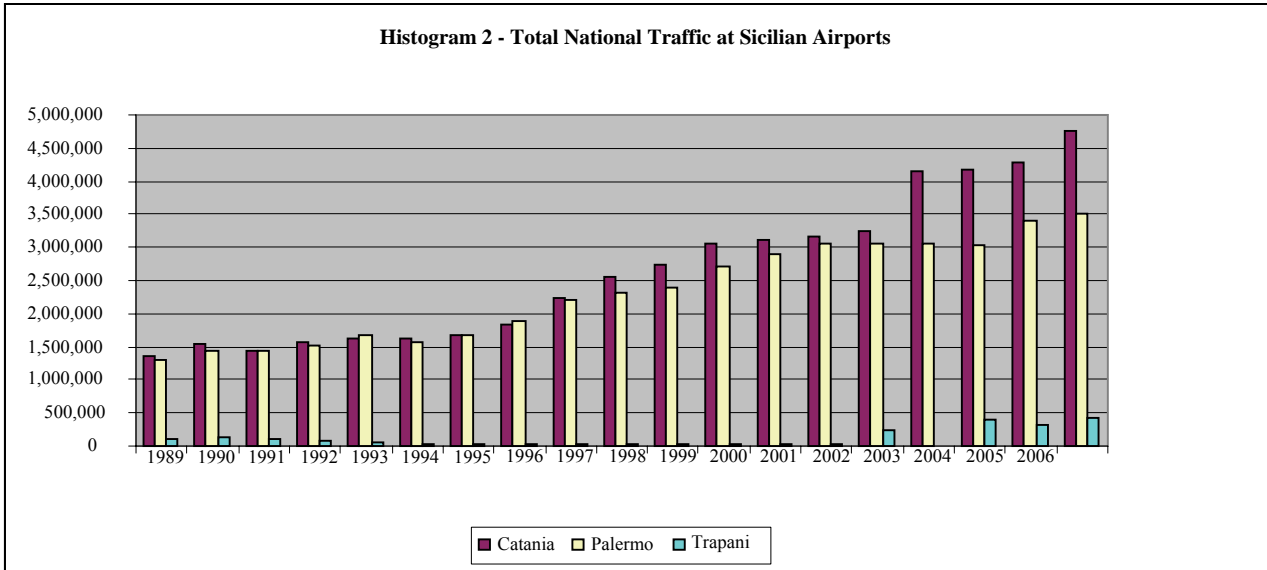
## **5. The liberalization effects in an Italian region: the Sicilian airport system**

In order to assess the effects of the liberalization of airport services, we have analyzed the cases of the three Sicilian airports: Catania, Palermo and Trapani.

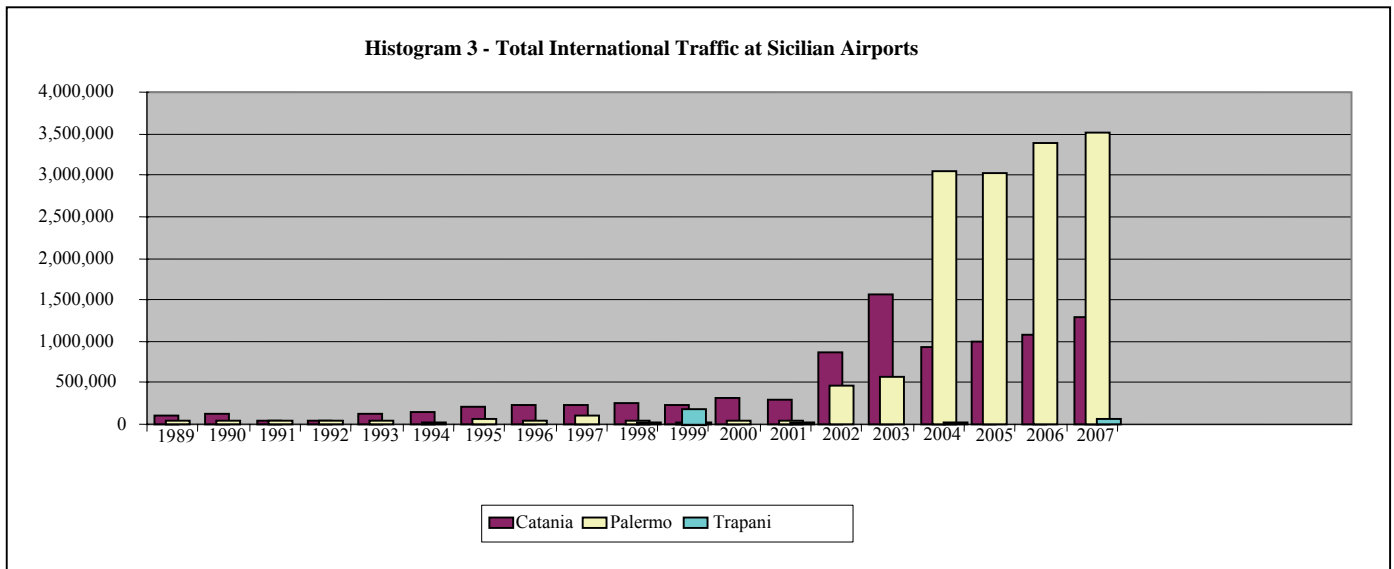
In the Sicilian airport system, 1995 saw the introduction of one component of deregulation: it was agreed to adopt a new formula for an administration closer to the private logic, even if the management's ownership has remained essentially public. As we can gather, from the data shown in Histograms 2 and 3, this transformation has not had much influence on the results achieved in

terms of traffic; the increase is in line with the national figure. The change in the legal form of airport management has not resulted in the adoption of more aggressive strategic decisions to acquire new traffic, because management continues to adopt local government policies.

From the perspective of the breakdown of the different traffic flows, as is the case for all airports (with the exception of Rome Fiumicino and Milan Malpensa), including the airports of Catania and Palermo, about 80% of the total passenger traffic is determined by movement at national level.



Data Source: Conto Nazionale delle Infrastrutture e dei Trasporti (Italian Transportation Account)



Data Source: Conto Nazionale delle Infrastrutture e dei Trasporti (Italian Transportation Account)

The clear dominance of international traffic, although attributable to the low socio-economic integration of Sicily within the European Union Area, is another consequence of operational decisions, scarcely attentive to the recovery of competitiveness of airports. In addition, the deployment of hub and spoke networks catalyses passengers on the international flights of the major airlines to hub airports, which are not found in Sicily.

Relatively recently, the development of the low cost segment has allowed us to capture new flows of traffic between airports in Sicilian and some European capitals.

Fig. 3 shows clearly that, by 2002 traffic on international routes had increased in scale. It should be noted that this increase relates to real increases in the volume of demand and is not a simple shift between domestic and international flights.

Another relevant fact that must be properly interpreted relates to the difference in the volume of traffic handled in the three airports. Catania has a higher traffic volume than Palermo, because its catchment area includes the population present in six of the nine provinces of Sicily. In addition, the province of Catania is characterized by commercial and industrial development which is more florid than in the province of Palermo. This airport is more attractive for airlines, particularly because of the highly profitable type of traffic.

This factor, exogenous to managerial skills, has enabled the airport management company of Catania to obtain better terms in its relationship with the airlines which are willing to pay higher charges. Finally the characteristics of the catchment area have allowed Catania airport to obtain the largest share of public funds intended for the regional development of Sicilian airport infrastructures.

## **6. Policy implication and conclusion**

The analysis of low-cost carrier choices and airport choice factors show that an important element is the performance of non-aeronautical activities (Potter, Warnock-Smith, 2005). Firstly, the low-cost segment, whose philosophy is based on the total absence of ancillary services, is essential for good catering and shopping centres inside the airport. In addition, where there is good non-flight-related revenue, the airport management companies have low aeronautical charges.

The special features that currently characterize the market for airport services, for the management company interested in making agreements with low-cost companies, require a detailed knowledge of costs and revenues from busi-



ness activities, with particular attention to non-aeronautical ones.

Indeed, such agreements can lead to an increase in airport profits if the airport fees can be settled so as to ensure a cash-flow adequate to recover all the costs supported to adapt the whole infrastructure, the handling services and the air navigation services to the rise of commercial traffic.

These considerations must be taken into account when we plan investments in the airport sector, as in the economic analysis undertaken to evaluate the implementation of a new airport in the peripheral area of Agrigento in Sicily. The strong tourism in the area may not be sufficient to generate a volume of traffic that can financially sustain the massive investment needed for the realization of the structures.

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