

Airport structure, governance and strategy: effects on performance

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Abstract

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This paper analyses the performance of the airport industry of the last two decades in terms of the structure, conduct and performance. While initially the structure has been largely determined by public planning, natural and locational monopoly characteristics, privatization and increasing downstream competition has slowly changed the nature of the industry. Conduct has changed as has the production spectrum in terms of vertical integration. Ground handling has become increasingly outsourced. The role of commercial activities is now increasingly important. Airport capacity has become increasingly scarce, but only at some airports. Excess demand is managed by the slot system in most countries with the notable exception of the US which rations by delays. Investment has been delayed in many cases and has not reduced the scarcity at some airports. Performance has been affected by privatization, regulation, competition and different management strategies. While some of the factors have improved airport performance others, such as partial privatization have not. Airport competition has intensified, but in most countries a certain number of airports still have persistent market power. Airport regulation has changed in many countries. Incentive regulation has been increasingly used in some EU countries and light handed regulation in Australia.

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