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Aviation Alliances in the Global Competitive Model of the XXIst century

INTRODUCTION

Rapid changes in global economy nowadays influence actually all sectors of national economy causing national producers to integrate to the leading multinational alliances. The latter, on the one side, foster the growth of international competitiveness of companies by way of creating the possibility to cooperate with the analogous entities, as well as contribute to the growing economic security within such formations, on the other side, aggravate the risks in case of failure of such integrative formations, as the interdependencies among the partners become many times deeper. These changes are carried out very quickly. So, a recently successful company, whose reliability was doubtless, can go bankrupt very easily, questioning not only its own business reputation, but also the one of its partners', pulling them along into the abyss. This trend was especially characteristic for the aviation transport, whose rapid conglomeration in the mid-1990s caused ex-competitors to form large groups oriented towards route structure optimization and docking of flights. Nevertheless, business risks not only ceased to decrease, but on several occasions even grew substantially.

Unfortunately, the research of “conglutination” effect in the modern international economic relations, as well as in the sector of aviation transport, has not been duly organized. The case may be described as follows: the science has been lagging behind the practice of international business, although it should not have. At the same time, several modern researches, mostly by western authors, have made a detailed methodological analysis of these issues. Among them are the works by C. Castles¹ (2000), P. Forsyth² (1998),

¹ Castles C. Development of Airport Slot Allocation Regulation of the European Community / Privatization and deregulation of transport / Ed. by B. Bradshaw and H. Lawton Smith. – Basingstoke: Macmillan, 2000. – P. 335–351.

² Forsyth P. The gains from the liberalisation of air transport// Journal of Air Transport Policy. – 1998. – N3. – P. 73–92.

H. Johnson³ (2003), E. Pels⁴ (2001), D. Starkie⁵ (2000) and others.

For the time being there is a lack of clear forecasts of aviation alliances development, assessment of their competitive level, as well as the identification of directions of further co-integration of global transporters. That is why, the identification of the peculiarities of globalization in the aviation transport and the formation of competing global alliances constitute the main focus of the present article. The main objectives are: to identify the essence of the aviation alliances, to detect the directions of their integrative development, to spot the tendencies of harmonization of their interests. It is also essential to consider the fact, that the current process of aviation companies' consolidation may reflect the future model of global economy, conducive for concluding monopolistic and oligopolistic deals between the main actors.

INTEGRATION ESSENCE OF AVIATION ALLIANCES

Integration processes of the late 1980-s through the early 1990-s influenced considerably the formation of certain coalitions in the aviation transport. Companies existing at that time required a clear positioning, as well as cooperation in the sphere of organization of passengers and cargoes transportation, establishing joint logistic systems, harmonizing interaction with the airports, and optimizing internal and external routes. These tasks appeared to be impossible to complete without establishing partnership relations with the former competitors. Moreover, annual passenger traffic growth of 6–9% resulting (according to ICAO data) into 16.72 million persons in 2000⁶ proved the necessity of forming sector aviation alliances. Another precondition for establishing alliances was the activity of airports, which gradually turned into giant hubs (basic or central airports of certain aviation companies with a great quantity of docking routes, developed infrastructure, affiliated companies etc.). This caused considerable changes in the structure of activities of the major air harbors of the world (mainly due to the supernormal growth of passenger traffic). EU policies may serve as the most representative example of these tendencies, especially after introduction of the “open sky” model (table 1).

³ Johnson P. *Air Transport / Industries in Europe. Competition, Trends and Policy Issues* / Ed. by Peter Johnson. – Cheltenham: Edward Elgar, 2003. – P. 260–286.

⁴ Pels E. A note on airline alliances // *Journal of Air Transport Management*. – 2001. – N 7. – P. 3–7.

⁵ Starkie D. *Allocation Airport Slots: a Role for the Market? / Privatization and Deregulation of Transport* / Ed. by B. Bradshaw and H. Lawton Smith. – Basingstoke: Macmillan, 2000. – P. 352–363.

⁶ All data mentioned in text were borrowed from the Annual Report of the ICAO http://www.icao.int/icaoet/dcs/9916/9916/9916_ru.pdf

Table 1. EU biggest airports, 2000

Name	Number of passengers, millions persons	Growth rate, 1996–2000 (average annual percentage change)
London, Heathrow	64,3	15,3
Frankfurt-am-Mein	49,0	28,8
Paris, CDG	47,8	52,1
Amsterdam	40,4	48,1
Madrid	32,6	53,1
London, Gatwick	31,9	32,6
Rome	25,9	14,0
Paris, Orly	25,4	-7,2
Munich	22,9	48,8
Brussels	21,5	61,1
TOTAL	361,6	30,7

Source: Johnson P. Air Transport / Industries in Europe. Competition, Trends and Policy Issues. – Cheltenham: Edward Elgar, 2003. – P. 276.

All the abovementioned arguments prove that variation of distribution of volumes of traffic among the EU-countries grew. During the five-year period (1996–2000) Brussels airport, Madrid airport and CDG airport (Paris) had the highest growth rates, whereas Orly airport (Paris) provided a quite representative counter-example. Being the main air harbor of the country in 1960s through 1970s it lost its position, and even its new status as a regional hub didn't save it from the significant decrease in passenger traffic. The thing is that air-travelers required one airport for route docking, and it was modern technologically advanced CDG (Paris) who took its place.

At the same time leading national carriers sewed up the biggest airports, capital as a rule. So, Heathrow (London) became central for "British Airways", CDG (Paris) for "Air France", Frankfurt-am-Mein for "Lufthansa", Haneda for the Japanese "Ana". "Delta Airlines" became the main carrier after the bankruptcy of "Pan American". It was founded on the "ruins" of the formerly biggest and most reliable air carrier in the past. From now on "Delta" chose Hartsfield (Atlanta) – the biggest airport in the world – to become its hub.

These and other conditions forced air companies to form alliances in late 1990s. Urgent measures facilitating future partnerships were the following:

- all-round harmonization of air flights time-table, establishing alliance-wide docking routes, which allowed to save some money for the passengers, on the one side, and keep regular customers for the long period, on the other side;
- launching "frequent flyer" programs, or, in other words, passenger loyalty programs, allowing to collect "sky miles" to obtain adequate benefits from alliances, including even free tickets;

- improvement of consumer relationship management;
- conclusion of the code-share agreements, stipulating common exploitation of air routes by two and more companies. One company served as an operator (actually fulfilled the flight), whereas others were its marketing partners, selling tickets to the operator's flight in their own names. This explained the dual code in the air flights time-tables.

The first alliance – “Star Alliance” – was created on the 14th of May 1997 by “Air Canada”, “Lufthansa”, “SAS”, “Thai Airways International” and “United Airlines”. The carriage covered almost the whole Northern hemisphere, as well as a considerable part of the Southern one.

In one year only, already in 1998, the following alliance – “Qualiflyer Group” – was created by the ambitious group of carriers headed by “Swissair” and Belgian “Sabena”. Other members of the alliance were TAP (Portugal), Turkish Airlines (Turkey), LOT (Poland) etc. The positions of the first two companies were doubtless. “Swissair” was called “the flying bank” at that time (because of its financial reliability), and “Sabena” had a good track record of reliable carrier, as it had been performing regular flights around Europe since 1923. However, the hopes for the permanence of this partnership failed, as it will be hereinafter demonstrated.

“American Airlines” and “British Airways” initiated on the 1st of February 1999 the creation of a new alliance – «One world». This alliance integrated the Finnish «Finnair», Spanish «Iberia», Japanese «Japan Airlines», as well as Mexican, Australian, Chinese and several other companies, bearing in mind establishing a globalized aviation space. The members of this alliance used centralized management system, conducted a supranational institutionalization of coordination process setting up universal principles as to the procedure and organization of joint activity, as well as R&D cooperation. In other words this grouping went much further in the process of horizontal integration, than any other aviation alliance existing at that time.

The forth global alliance “Sky Team” was created on the 22nd of June 2000. French “Air France” together with American “Delta Airlines” were the most influential founders of the alliance. Mexican “Aeromexico” and Korean “Korean Air” also joined the agreement. The alliance arrangement stipulated association and partnership types of membership.

So, the four major aviation alliances existed on the turn of the century. They were involved into a latent but very exhausting struggle for the involvement of new members and enticing the existing ones.

Terrorist attacks in the USA (2001) and an insufficient level of flights security (as it later turned out) decreased the number of passengers by 1.5% in 2001 and by another 0.1% in 2002. Aviation companies suffered much from these events. The “weakest link in the chain” was the “Qualiflyer Group”. The

Belgian “Sabena” declared itself bankrupt in November 2001. The reason was insufficient liquidity to cover its indebtedness. All attempts of the national government to help its sole national aviation carrier didn’t succeed, as they were qualified as the violation of the common competitive law. “Swissair’s” also couldn’t give a hand, as its financial situation needed rapid interference. In certain time “conditional assistance” was granted by “Lufthansa”, which bought an equity stake of the Swiss company, introduced its own management system, cut unproductive expenditures and canceled profitless routes, leaving however its famous brand intact. This is how the alliance ceased its existence, and the rest of the members joined other alliances. At that time there were only three of them⁷.

In 2003–2004 the aviation carriage, including cargo traffic, was on the quick up-take. According to ICAO the quantity of passengers grew in 2004 by 11%, including a 14.1% passenger traffic growth, and only 10.6% cargo traffic growth. In 2007, just before the world crisis went off, the quantity of passenger departures reached 2.281 billion persons, cargo traffic reached 41.8 million ton. Leading international airports worked with great exertion (table 2).

Table 2. The busiest airports in the world, 2007

№	Passenger departures, million persons		№	Cargoes shipped, million ton	
1	Atlanta, Hartsfield	89,4	1	Memphis, Intl.	3,84
2	Chicago, O’Hare	76,2	2	Hong Kong, Intl.	3,77
3	London, Heathrow	68,1	3	Anchorage, Intl.	2,83
4	Tokyo, Haneda	66,7	4	Seoul, Inchon	2,56
5	Los-Angeles	61,9	5	Shanghai, Pudong	2,49
6	Dallas, Ft World	59,8	6	Paris, Charles de Gaulle	2,30
7	Paris, Charles de Gaulle	59,9	7	Tokyo, Narita	2,25
8	Frankfurt-am-Mein	54,2	8	Frankfurt-am-Mein	2,17
9	Beijing, Capital	53,7	9	Louisville, Stanford	2,08
10	Madrid, Barajas	52,1	10	Miami, Intl.	1,92
11	Denver, Intl.	49,9	11	Singapore, Changi	1,92
12	New-York, JFK	47,8	12	Los-Angeles, Intl.	1,88

Source: Мир в цифрах 2009. [Пер. с англ. Н.Кононовой]. – М: ЗАО «Олимп-Бизнес, 2009. – С. 62.

Accounting for the fact that the possibility to delocalize aviation traffic (as it was once in the occasion of airports of New-York, Paris, Moscow and some other cities) was limited, hyper-concentration of this kind of services continued to grow. The USA retained the leading position in passenger traffic (table 3). The second position lagging far behind was occupied by China, followed by the UK (due to its insular position), Germany and France.

⁷ Not accounting for the minor formations and several conditional alliances (e.g. Arab countries).

Table 3. Countries leading in passenger traffic, 2007

Rank	Country	Passenger traffic, mln passenger-km	Rank	Country	Passenger traffic, mln passenger-km
1	USA	1271344	11	Netherlands	71771
2	China	228484	12	Hong Kong	70592
3	UK	218967	13	UAE	65491
4	Germany	144005	14	India	59269
5	France	123336	15	Thailand	55292
6	Singapore	90126	16	Russia	51884
7	Australia	77739	17	Italy	47465
8	Spain	77265	18	Malaysia	38956
9	South Korea	72823	19	Mexico	32813
10	Canada	72486	21	Saudi Arabia	29715

Source: Мир в цифрах 2009. [Пер. с англ. Н.Кононовой]. – М: ЗАО «Омимп-Бизнес, 2009. – С. 68.

The unlocking of aviation space, trans-Atlantic and European, first of all, fostered the development of air traffic and facilitated the expansion of “elite” aviation clubs. The “Star Alliance” membership grew rapidly, gaining as its members the “Swiss International Air Lines”, “South African Airways” (2006), “Air China”, “Shanghai Airlines” (2007), “Turkish Airlines”, “Egypt Air” (2008) etc.

Russian “Aeroflot” joined “Sky Team” in 2006. Hungarian “Malev”, Japanese “Japan Airlines”, Jordanian “Royal Jordanian” (2008) joined the “Oneworld” alliance. Also a number of cargo alliances were set up as well as some other informal groups. Nevertheless the trio of alliance leaders became really global in the end of 2009 accounting for more than 60% of world passenger traffic (table 4).

Table 4. Global alliances of air-carriers (2009)

Name of the alliance and the names of its members (aviation companies)		
STAR ALLIANCE Established May 14, 1997.	SKY TEAM Established June 22, 2000.	ONEWORLD Established February 1, 1999.
<i>1</i>	<i>2</i>	<i>3</i>
Adria (Slovenia)	AEROFLOT (Russia)	American Airlines (USA)
Air Canada (Canada)	Aeromexico (Mexico)	British Airways (UK)
Air China (China)	Air France / KLM (France, Netherlands)	Cathay Pacific (Hong Kong, China)
Air New Zealand (New Zealand)	Alitalia (Italy)	FINNAIR (Finland)
Ana (Japan)	China Southern Airlines (China)	Iberia (Spain)
Asian Airlines (South Korea)	Czech Airlines (Czech Republic)	Japan Airlines (Japan)
Austrian (Austria)	Delta Airlines (USA)	LAN (Chile)
Blue 1 (Finland)	Kenya Airways (Kenya)	Mexicana (Mexico)
BMI (UK)	Korean Air (South Korea)	Qantas (Australia)

<i>1</i>	<i>2</i>	<i>3</i>
Continental Airlines (USA) Croatia Airlines (Croatia) Egypt Air (Egypt) LOT (Poland) Lufthansa (Germany) SAS (Denmark – Norway– Sweden) Shanghai Airlines (China) Singapore Airlines (Singapore) South Africa Airways (South Africa) SPANAIR (Spain) Swiss (Switzerland) TAP (Portugal) Thai (Thailand) Turkish Airlines (Turkey) United (USA) US Airways (USA)	Northwest Airlines (USA) AirEuropa (Spain)	Royal Jordanian (Jordan)
25 companies representing 24 countries	11 companies representing 11 countries	10 companies representing 10 countries

“STAR ALLIANCE”: OPTIMAL OR CLUB MODEL?

The well-known English researcher Jan N. Pieterse (2008) in frequent polemics with other scientists concerning the further amplification of global processes determines, in our view, definitely enough, that the so-called hybridization (especially the structural one, defined as a social cooperation and rivalry) may turn into a core factor causing the restructuring of social spaces⁸. To our mind, the structural hybridization phenomenon should be expanded to economic sphere as a tool for explanation of modern trends. A good proof for it can be found in the sphere of aviation alliances, and especially in the case of the most powerful “Star Alliance” described hereinabove, which consists of 25 companies including two regional partners – “Adria” (Slovenia) and “Croatia Airlines” (Croatia). Alliance’s fleet consists of 3697 units, performing 19056 routes daily (2008) covering all inhabited continents. The passenger traffic peaked in 2008 with 1189.2 billion of passenger-kilometers or 27.7% of total traffic in the

⁸ Глобальні модерності / За ред. М.Фезерстоуна, С.Леша, Р.Робертсона. – К.: Ніка-Центр, 2008. – С. 99–100.

world. Almost half a million of executives (457 thousand) represented the personnel of the alliance's companies, facilitating the execution of flights to almost 900 airports in 160 countries.

Table 5. Basic indicators of “Star Alliance”, 2008

№	Name	Hub / hubs	Total income		Daily flights (number)	Number of destination countries/ airports	Passenger traffic		Number of passenger flights per year		Personnel		Fleet	
			bln USD	Share in alliance total, %			bln pas-km	Share in alliance total, %	Mln persons	Share in alliance total, %	Persons	Share in alliance total, %	Units	Share in alliance total, %
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
1.	Adria	Ljubljana	0,306	0,18	32	20/21	1,35	1,14	1,302	0,22	702	0,15	14	0,4
2.	Air Canada	Toronto Montreal Vancouver	10,3	6,08	1370	39/171	81,3	6,84	33,0	5,56	24700	5,4	335	9,1
3.	Air China	Beijing Shanghai Chendzhu	7,3	4,31	840	32/143	67,0	5,63	34,84	5,87	22211	4,4	243	6,6
4.	Air New Zealand	Oakland Los Angeles Hong Kong	3,0	1,77	560	16/53	27,1	2,28	12,4	2,09	10500	2,3	100	2,7
5.	Ana	Tokyo Osaka Nagaya	14,2	8,38	952	13/78	56,9	4,79	47,0	7,92	34410	7,53	214	5,7
6.	Asian Airlines	Seoul Inchon	4,26	2,51	302	20/81	22,7	1,91	13,13	2,21	8134	1,78	71	1,9
7.	Austrian	Vienna	3,67	2,17	450	66/120	18,9	1,59	10,7	1,8	7200	0,16	91	2,5
8.	Blue 1	Helsinki	0,272	0,16	80	10/22	1,4	0,12	1,62	0,27	450	0,1	12	0,3
9.	BMI	London	1,99	1,17	240	30/48	11,0	0,92	10,0	1,69	4598	1,0	54	1,5
10.	Continental Airlines	Houston New-York (Newark)	15,2	8,97	2423	50/262	133,3	11,28	67,0	11,29	42210	9,24	351	9,5
11.	Croatia Airlines	Zagreb	0,231	0,14	65	19/29	1,16	0,1	1,58	0,27	1022	0,22	11	0,3
12.	Egypt Air	Cairo	1,48	0,87	232	44/69	12,0	1,01	7,8	1,31	7300	1,6	50	1,4

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
13.	LOT	Warsaw	0,831	0,49	226	28/50	6,71	0,56	3,9	0,66	3720	0,8	49	1,3
14.	Lufthansa	Frankfurt-am-Mein Munich	33,86	19,97	2005	78/206	154,15	12,96	70,5	11,88	108123	23,67	534	14,4
15.	SAS	Copenhagen Oslo Stockholm	7,68	4,53	680	31/86	29,9	2,53	22	3,71	15000	3,28	210	5,7
16.	Shanghai Airlines	Shanghai	1,97	1,17	234	8/80	14,39	1,21	10,65	1,8	5680	1,24	60	1,6
17.	Singapore Airlines	Singapore	9,3	5,49	220	35/65	90,128	7,58	18,3	3,08	14142	3,1	109	2,9
18.	South Africa Airways	Johannesburg	3,67	2,17	178	27/35	21,94	1,85	6,9	1,16	8000	1,75	55	1,5
19.	Spanair	Madrid Barcelona	1,56	0,92	250	6/27	11,35	0,95	10,2	1,72	3036	0,66	45	1,2
20.	Swiss	Zurich Geneva Basel	4,89	2,88	370	42/76	25,1	2,11	13,5	2,28	7000	1,53	77	2,1
21.	TAP	Lisbon Porto	3,17	1,87	260	30/67	21,91	1,84	8,74	1,47	6900	1,51	71	1,9
22.	Thai	Bangkok Phuket	5,68	3,35	127	35/74	60,3	5,07	19,6	3,3	26897	5,89	88	2,4
23.	Turkish Airlines	Istanbul Ankara	3,09	1,82	460	75/159	29,2	2,46	22,5	3,79	12397	2,71	135	3,7
24.	United	Chicago Los Angeles Washington	20,2	11,91	3300	30/200	189,0	15,89	80,0	13,48	48000	10,51	362	9,8
25.	US Airways	Philadelphia, New-York Las Vegas	11,5	6,78	3200	32/206	101,0	8,49	66,1	11,14	36500	7,99	356	9,6
Total "Star Alliance"			169,544	100	19056	-	1189,2	100	593,3	100	456832	100	3697	100

Estimated by the author on the base of <http://www.staralliance.com/en/about/airlines>

The total income of the alliance amounted to 170 billion USD in 2008, and the largest hubs serving the aviation companies were the world's leading airports: Tokyo, Beijing, Seoul, London, New-York, Cairo, Shanghai, Singapore, Zurich, Bangkok, Istanbul and Chicago. The intended accession of "Air India" and some other companies to the alliance in 2009 may push the share of the alliance up to the $\frac{1}{3}$ of the global passenger traffic.

The abovementioned data definitely prove the stable positions of the alliance on the air transport market. At the same time, we need to consider separately the trends in internal structure and policies to support alliance competitiveness. Let us consider the data in table 5.

The five companies top the list of members of the alliance. They are "Lufthansa" (Germany), "United" (USA), "US Airways" (USA), "Continental Airlines" (USA), "Air Canada" (Canada). The Chinese "Air China", Japanese "Ana" and Scandinavian "SAS" are worth considering as prospective leaders. The abovementioned "five", however, is a sort of heart of the alliance, accounting for the 52.4% of the alliance fleet, 56.8% of personnel, 53.4% of passengers carried, 55.5% of passenger traffic, 64.5% of flights. The common income of this group amounts to 53.7 bln. USD (2008), and the influence on the internal policy-making is decisive.

The abovementioned data allow making a conclusion concerning the characteristic features of the structural policy in "Star Alliance". They are the following, as we believe:

- implementation of the expansion strategy, in a quite careful way, however, as it requires selecting the reliable candidates which are not likely to be tempted by the advantages of other groupings and transfer to some other alliance⁹, high level of flight security, economic efficiency, service quality, reliability of fleet;
- cooperation with partners on domestic flight markets, which allows quick optimization of cargo and passenger traffic, relied upon the resources of local partner-companies;
- cross-investment, or a purchase by a partner company of an equity stake (frequently a controlling interest) of the other member-company;
- launching common passenger loyalty programs, as well as mutual recognition of the number of miles accumulated;
- passenger service standardization;
- common alliance-wide advertising strategy;
- mutual assistance in case of flights cancellation¹⁰;

⁹ On December 31, 2007 Brazilian "Varig" withdrew from the alliance.

¹⁰ The author of these lines had a possibility to fly once from Rzeszow through Warsaw to Kyiv. The flight to Warsaw was canceled, and the passengers were conveyed by bus, causing the

- common measures promoting flights security;
- common passenger “black lists” (lists of persons violating the flight rules).

CONCLUSIONS

1. The creation and selection of powerful alliances in today’s world is a natural reaction of aviation companies to the challenges of economic globalization, reflecting their wish to protect corporate interests in the framework of ever-growing competition intensity, embracing the globe in the XXI century.

2. The main feature of creation and successful operation of aviation alliances is the consolidation of companies around a conditional core, represented by 3–5 leading member-companies. They suggest the integration model of a new grouping, which stipulates, as a rule, cooperation with partners, passenger and cargo traffic optimization, launching passenger loyalty programs, code-sharing agreements conclusion etc. The highest level of horizontal integration is characteristic for the “Oneworld” aviation alliance.

3. The major direction of activities of the newly established alliances is connected with the implementation of their expansion strategy oriented not only (and in many cases no so much) to the growth of membership, but more towards the scrupulous candidates selection on the basis of quality, targets, competitive advantages and other criteria.

4. High indebtedness of aviation companies, existence of profitless routes, high non-production expenditures may result into a bankruptcy not only of a single company, but of the entire alliance. These are the main factors shedding light on the low quotations of shares of the leading aviation companies in the world.

5. The world’s largest alliance is the “Star Alliance” incorporating 25 companies from 24 different countries in 2009. It accounts for 28% of the world’s passenger traffic. At the same time the leading “five” within the grouping – “Lufthansa”, “United”, “US Airways”, “Continental” and “Air

tardiness to the flight to Kyiv. Polish “LOT”, the member of “Star Alliance”, proposed to fly to the capital of Ukraine with a transfer in Munich (aboard the “Lufthansa’s” aircraft). The other proposal was to make a transfer in Vienne (aboard the “Austrian’s” aircraft), but the destination would be reached only the following day. The first option (to fly to Kyiv in the opposite direction), absurd from the point of view of formal logic, was chosen after some reflections, the alliance, however, perceiving no weirdness in the situation.

Canada” – define quite clearly the structural policy of the alliance, as well as the prospective directions of expansion to the global markets.

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Summary

The article is devoted to the identification of the peculiarities of globalization in the aviation transport and the formation of competing global alliances. The main objectives are: to identify the essence of the aviation alliances, to detect the directions of their integrative development, to spot the tendencies of harmonization of their interests. Authors also argue that the current process of aviation companies' consolidation may reflect the future model of global economy, conducive for concluding monopolistic and oligopolistic deals between the main business-actors.

Alianse lotnicze w modelu konkurencji globalnej XXI wieku

Streszczenie

Artykuł został poświęcony identyfikacji specyficznych cech globalizacji transportu lotniczego i tworzenia konkurencyjnych aliansów globalnych. Główne cele opracowania to: identyfikacja istoty aliansów lotniczych, określenie kierunków ich integracji oraz wskazanie tendencji do wzajemnej harmonizacji ich interesów. Autorzy argumentują, że obecne procesy konsolidacji przedsiębiorstw lotniczych mogą odzwierciedlać przyszły model globalnej gospodarki, sprzyjającej zawieraniu monopolistycznych i oligopolistycznych porozumień pomiędzy głównymi graczami.