Available online at www.sciencedirect.com

ScienceDirect

Transportation Research Procedia 75 (2023) 240–249

Transportation Research Procedia

www.elsevier.com/locate/procedia

12th International Conference on Air Transport – INAIR 2023, The Future of Aviation – is the Sky the Limit?

Expert insights into the impact of aeropolitics on regional air market integration in ASEAN

Haris Zuan[a,]*, Darren Ellis[a] & Romano Pagliari[a]

[a]*Centre for Air Transport Management, Cranfield University, College Road, Cranfield MK43 0AL, United Kingdom*

Abstract

By 2015 the Association of Southeast Asian Nations (ASEAN) planned to achieve regional air transport liberalisation through the ASEAN Single Aviation Market (ASAM) to enhance connectivity, economic development and regional integration. However, progress on ASAM has not met initial expectations. To explore the factors influencing air market integration in ASEAN this paper focuses on the concept of aeropolitics, as the literature suggests it plays a significant role in shaping regional integration. A survey (n=50), supported by semi-structured in-depth interviews (n=15), were conducted amongst experts in Southeast Asia to examine the impact of key aeropolitical factors on regional air market integration in ASEAN. Respondents agreed on the importance of factors such as national interest, the influence of political elites with vested interests, regional identity and the involvement of superpowers. By examining experts' perceptions, this paper uncovers complexities and challenges related to the aeropolitical dynamics in ASEAN. Results unearthed a range of key insights and provide the basis for further research and policy development. Centrally, ASEAN is not following the European model with its supranational top-down approach, but rather is incrementally standardising and harmonising air transport across the region based on consensus and mutual interest under the umbrella of the 'ASEAN way'. Progress for ASAM to date has been more than critics admit, yet less than supporters would like. Within these mixed results lies a story of regional integration that may hold important insights for other regions of the world.

© 2023 The Authors. Published by ELSEVIER B.V.
This is an open access article under the CC BY-NC-ND license (https://creativecommons.org/licenses/by-nc-nd/4.0)
Peer-review under responsibility of the scientific committee of the 12th International Conference on Air Transport – INAIR 2023, The Future of Aviation – is the Sky the Limit?

Keywords: ASEAN; aeropolitics; regional intergration; ASEAN way

* Corresponding author. *E-mail address:* hariszuan@cranfield.ac.uk

2352-1465 © 2023 The Authors. Published by ELSEVIER B.V.
This is an open access article under the CC BY-NC-ND license (https://creativecommons.org/licenses/by-nc-nd/4.0)
Peer-review under responsibility of the scientific committee of the 12th International Conference on Air Transport – INAIR 2023, The Future of Aviation – is the Sky the Limit?
10.1016/j.trpro.2023.12.027

1. Introduction

This paper aims to build on an earlier conceptual publication by the authors (Zuan, Ellis & Pagliari, 2021) which detailed the planned doctoral research on the aeropolitics of the ASEAN singe air market (ASAM), principally exploring and examining the key aeropolitical barriers and opportunities to advance regional air market integration amongst ASEAN member states. The paper here focuses mostly on the first phase of data collection for this research; an online expert survey conducted from August to November 2022 which received 50 usable responses (n=50). The subsequent second phase of data collection involved expert semi-structured in-depth interviews (n=15) conducted from September 2022 to January 2023; these are currently being thematically analysed, and their key insights assessed. Preliminary interview data results are employed in this paper to support and compliment the survey data, insights and findings.

In 2004, ASEAN adopted an Action Plan for ASEAN Air Transport Integration and Liberalisation 2005-2015 (ASEAN, 2004). Subsequently, in 2007, to increase economic connectivity and create an integrated market under the ASEAN Economic Community (AEC), ASEAN agreed to establish the ASEAN Single Aviation Market (ASAM) by 2015 (Forsyth, King and Rodolfo, 2006). ASAM is an open skies policy that aims to liberalise the ASEAN air market up to seventh freedom traffic rights and enable the introduction of an ASEAN Community Carrier designation by relaxing airline ownership and control. Yet, based on a Master Plan for ASEAN Connectivity 2025, there were only two out of nine initiatives completed by the end of 2016 (ASEAN, 2016). The implementation framework has now been brought forward to 2025 under the ASEAN Transport Strategic Plan 2016-2025 (ASEAN, 2015).

The current body of literature identifies several significant obstacles that hinder the attainment of greater air market liberalisation within the ASEAN region. Among these hurdles, a notable one is the absence of a supranational regional institution (Lee, 2015, 2019; Tan, 2006, 2013, 2014), coupled with strong nationalistic tendencies (Jane Fox and Ismail, 2017), and inadequate airport infrastructure (Gootiiz and Mattoo, 2015; Tan, 2009). These all reflect the systematic imbalances that are imbedded within the socio-historical fabric of the region. While existing research acknowledges the impact of aeropolitics, mostly underpinned by a focus on geopolitics and political economy (Alan Tan, 2010b; Lee, 2019; Permana, Hoen and Holzhacker, 2020; Saraswati and Hanaoka, 2013; Tan, 2006, 2013), these factors tend to receive limited attention on the whole, meaning there is little in the way of a comprehensive exploration of their effects on the ASEAN air transport sector.

The prevailing literature has primarily focused on regulatory and economic standpoints when dissecting the market imbalances in the region. Nevertheless, a crucial opportunity exists to expand the range of perspectives on the subject, and thereby enhance our understanding of the intricate facets which surround airline market liberalisation in the region.

2. Methodology

Data collection was designed around two phases, with Phase 1 being an online survey followed by Phase 2 the in-depth interviews. Both phases were intended for expert respondents and interviewees respectively. The survey aimed to gather a deeper understanding of aeropolitical challenges for the ASEAN air transport integration process from subject matter experts. For this study, an expert refers to an individual who has specialised knowledge and/or experience, not just in the field of ASEAN air transport but also in other related fields such as trade, investment, and international relations. This study also tapped into the expertise of public intellectuals such as journalists and academics who also engage with the subject area. The survey used self-rating to define the level of knowledge and experience of each respondent, while interviewees were contacted and engaged based on their professional expertise and profile.

Data obtained from this study primarily aimed to generate key expert insights. The survey was developed in Qualtrics and adopted purposive sampling (judgment sampling) and employed two survey dissemination modes to reach experts. A pilot survey was conducted in July 2022 which involved ten respondents (n=10) providing the opportunity to improve the main survey prior to its release between August to November 2022. In total, 66 responses were received to the main survey, of which 16 had to be removed due to either: (i) not meeting the expert criteria (n=6), or (ii) failure to complete the survey in full (n=10), which resulted in a final sample size of 50 responses (n=50). Preliminary interview data and analysis from Phase 2 of the research, to support and compliment the survey data and

analysis, is also employed in this paper. Though this interview data is currently being thematically analysed, a range of pertinent direct interviewee quotes and paraphrased key ideas are provided in this paper.

3. Findings and discussions

3.1. Respondents' background, expertise focus and knowledge of ASEAN

University academics made up 28% (n=14) of the expert cohort, while a further 26% (n=13) identified as researchers. The remaining 46% (n=23) represented various professional backgrounds, including consultants 18% (n=9), journalists 10% (n=5), government officials 8% (n=4), airline managers 6% (n=3), and lastly airport managers 4% (n=2). To further explore the expertise of respondents within the ASEAN member states, 44 respondents provided answers to this aspect of the research. It is important to note that respondents could choose multiple answers, allowing for a comprehensive understanding of their areas of specialisation. Moreover, it is noteworthy that all ASEAN member states were represented among the respondents. However, there may be variations in the extent to which each member state was represented in the sample.

Concerning knowledge of ASEAN, the respondents tended to rate their understanding higher than the average, as indicated by their self-assessment scores on a 10-point Likert scale having a mean score of 7 out of 10. In Q4a, respondents were explicitly queried about their stance on ASEAN integration. A significant majority (94%) expressed support for the ASEAN regionalism project. This question helps to establish that, in the context of this study, the respondents generally supported the ASEAN regionalism model that promotes the elimination of tariffs, including duties and surcharges, as well as nontariff barriers like licensing rules and quotas (ASEAN, 2022; Hsieh and Mercurio, 2019; Siew Yean, 2019).

4. The most influential factors contributing to regional air transport integration within ASEAN

Before delving into the specifics of the most salient aeropolitical factors, the objective of the survey was to initially offer an outline of four primary factors that are derived from well-established strategic frameworks in air transport, notably the PEST framework along with the PEG framework (Ellis, 2020). Combined, they encompass political, economic, social, technological and geographical location categorisations. This approach aimed to ascertain the relative significance of each factor in relation to the advancement of the ASAM project. The results indicate that most respondents agreed on the significance of politics (4.70 out of 5) and economics (4.50) as the most critical factors in ASEAN air transport market liberalisation. However, there was no clear consensus among respondents regarding the extent to which technological (3.42) and geographical location (3.88) factors contribute to integration.

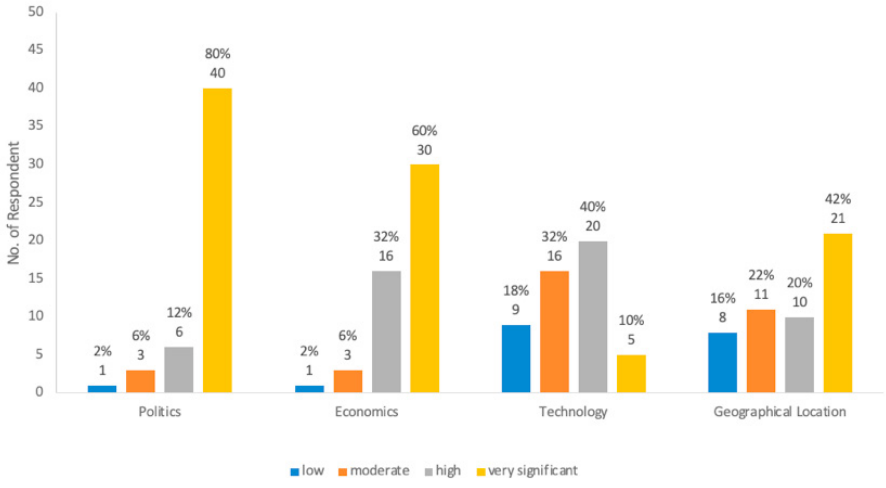


Fig. 1. Factors contributing to regional air transport integration within ASEAN. Source: Author compiled using survey data from 2022

Most respondents (92%) firmly believed that politics has either *highly* (12%) or a *very significant* (80%) role in determining the success of air transport integration within ASEAN. This almost unanimous consensus agreement suggests that political factors play a crucial role in driving and facilitating air transport regional integration. Initial insights obtained from the expert in-depth interviews indicate unanimous agreement among interviewees that ASAM's implementation relies significantly on each individual country's political will, as the ASAM agreement is not legally binding – akin to other agreements in ASEAN (Tan, 2014). The political factors are further examined in the next section.

With respect to the economic factors, most respondents rated the economy as a *very significant* (60%) or *highly significant* (32%) factor driving regional air transport integration. Data from the in-depth interviews highlighted that middle-class growth and regional economic transformation act as main push factors. This is supported by OAG data analysis. Since the early 2000s, airline passenger numbers have positively grown as seat numbers gradually rose by 20%, from 126.8 million in 2005 to 152.2 million in 2009 and surged by 17% within 2010 alone. In 2018, seats soared by 68% to 397.1 million compared to 2005, even though a slight reduction occurred in 2019 due to the US-China trade war impacting Southeast Asia and Europe (IATA, 2019). Within two decades, Southeast Asia's seat offerings tripled, revealing it to be a dynamic emerging market, contributing 11% to the global air transport market in 2019 (Development Bank, 2023). As concluded by *Interviewee 4* (academia – trade and investment): "ASAM was introduced to capitalise and facilitate the economic growth of the region".

The respondents' perspectives on the third factor, namely technology, were somewhat divergent. Notably, a small portion of the respondents (18%) considered technology to have a *low significance* which suggests that it had a rather limited role in facilitating regional integration. The respondents exhibited a range of perspectives when considering geographical location as a factor influencing air transport integration within ASEAN. More than half of the respondents (64%) indicated that geographical location is a *highly* (20%) or *very significant* (42%) factor in the integration process. The survey responses here suggest that respondents recognise the influence of geographical factors, such as the extent to which states were landlocked, largely consist of island archipelagos, and/or were otherwise affected by territorial size and distance, in shaping integration efforts.

5. Political economy

This section sought to elicit respondents' perspectives on the interplay between key political economy themes and aeropolitics. This encompassed consideration of the following dimensions: national interest in air transport, the vested interest of political elites in air transport, regional identity in air transport integration, and finally, air transport as a tool of soft power. In general, the respondents in this section agreed that all these factors significantly influence the extent of air transport liberalisation within ASEAN. It is important to note that the purpose of this section was not to rank these factors, as they can coexist and interact in complex ways. However, the findings indicate clear links between political economy factors and air transport liberalisation, as perceived by the respondents.

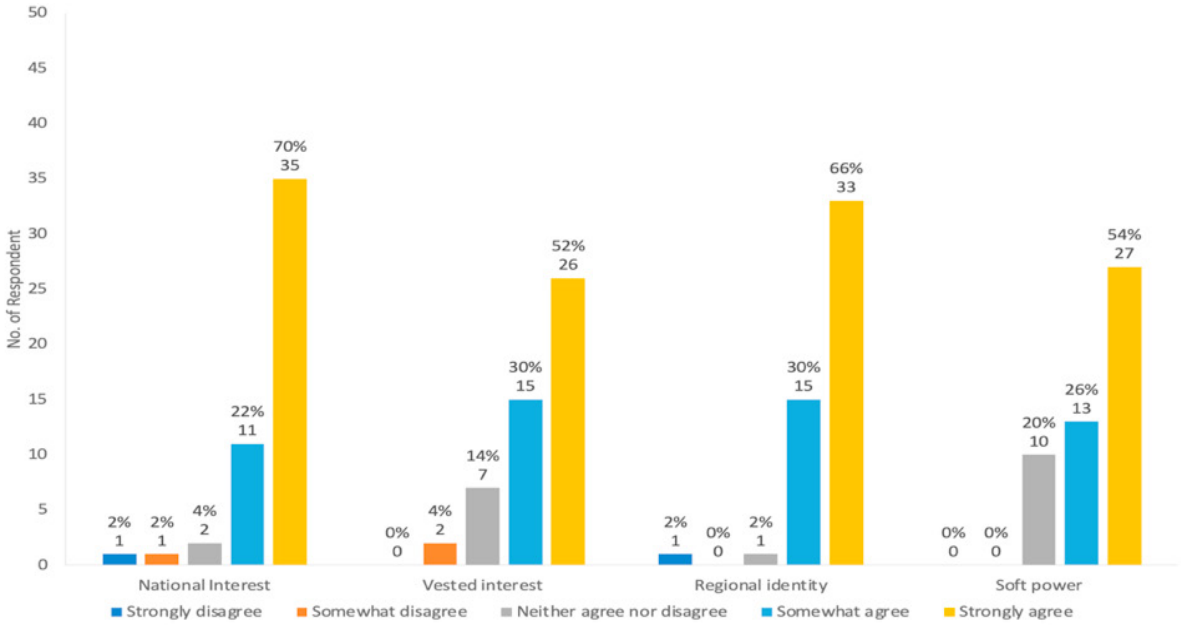


Fig. 2. Political Economic Factors influencing regional air transport integration within ASEAN. Source: Author compiled using survey data from 2022.

Respondents were asked to provide their perspective on airline ownership and control restrictions in ASEAN member states, primarily driven by the motive to protect national interests. The findings indicate a significant level of agreement among the respondents, with 70% expressing support for this statement. This viewpoint suggests that the respondents in agreement acknowledge how the Southeast Asian states see such restrictions as strategic control over the aviation sector. Insights from interviewees further reveal how apart from Southeast Asia nationalism, national carriers also serve as strategic assets. For instance, *Interviewee 3* (senior officer of national air transport regulatory body) explained: "Just like when we are having war with the Sulu people. They flew troops there and if you don't have your national carriers....you cannot count on other countries because the airlines are owned by other countries".

Furthermore, as a region mostly comprised of developing countries which rely heavily on air transportation to link island archipelagos and mountainous terrain, fulfilling public service obligations (PSO) is vital, especially on routes that are not profitable. As explained by *Interviewee 9* (aviation consultant): "AirAsia tried it to make it a commercial success. How many months did they last? Less than a year. PSO is one of the reasons also why the airlines must stay. Without these services, the people will be cut off from the outside world".

Regarding respondents' perceptions on the influence of political elites with vested interests in air markets, especially with respect to deregulation and liberalisation in ASEAN, the survey findings reveal a notable level of agreement among the respondents, with 75% strongly agreeing and another 22% somewhat agreeing that political elites with vested interests impede further progress on deregulation and liberalisation of the air transport market. This suggests that respondents believe political entities with personal, or group interests, might hinder integration progress. The perception of vested interests obstructing deregulation and liberalisation reveals concerns about the presence of monopolies and duopolies (CAPA, 2018; Trihermato, 2019), cronyism and rentier capitalism (Elder, 2015; MAVCOM, 2019) in the air transport sector in the region.

The significance of regional identity in facilitating the process of air transport integration within ASEAN was also gauged on the survey, with 66% of respondents agreeing that it is a significant factor (strongly agree), and a further 30% opting for somewhat agree. This viewpoint suggests that the respondents acknowledge the importance of fostering a sense of shared identity and common purpose among ASEAN member countries to achieve further integration. One of the key examples is ASEAN Lane - a dedicated passport control lane at airports across the bloc for citizens of ASEAN member states. In 2015, Malaysia emerged as the pioneer among ASEAN nations in effectively executing the ASEAN Lane to promote ASEAN identity. Subsequently, a handful of other airports also adopted this

initiative, although it is noteworthy that not all airports across the region have embraced it to date (Chongkittavorn, 2015; The Sun Daily, 2015).

Most respondents (54% agreed, and 26% somewhat agreed) that air transport is a vital soft power tool used by ASEAN member states. They likely perceive air connectivity as fostering closer ties and building positive relationships between ASEAN member countries and the wider international community. Singapore Airlines emerges as an exemplar in effectively leveraging branding rooted in a Southeast Asian identity with the iconic Singapore Girl in her *kebaya sarong*, the only commercial figure in the renowned Madame Tussaud's wax museum since June 1993 (Heracleous, Wirtz and Pangarkar, 2009). This same underlying motivation could account for AirAsia's strategic positioning as a representative of ASEAN. As the dominant low-cost airline in Southeast Asia, AirAsia unveiled the *Truly ASEAN* tagline in 2008, and introduced the *I Love ASEAN* slogan, accompanied by the ASEAN emblem, in 2017. These initiatives reflect their commitment to aligning with and promoting the shared identity and aspirations of the ASEAN region.

6. Geopolitics

Respondents in this section of the survey were presented with three significant geopolitical issues related to major powers, focusing on China and the implications for ASEAN's air transport policy. By examining these issues, the survey aimed to capture the respondents' perspectives on the geopolitical dynamics of the region, and how they shape air transport policy within ASEAN. The topics explored three main issues: (i) the effects of China's Belt and Road Initiative (BRI) investments; (ii) ASEAN and EU air transport agreement and its connection to China's dominance over ASEAN; and (iii) consequences of maritime and territorial disputes in the South China in the context of their impact on ASEAN's regional air transport cooperation and integration. The findings in this section indicate the complex and multi-faceted nature of geopolitical issues in shaping ASEAN's air transport policy and regional integration efforts. While respondents acknowledged the potential benefits of China's investment, together with the ASEAN-EU agreement, differing perspectives emerged regarding the impact of maritime disputes. These findings underscore the importance of considering diverse viewpoints, while also understanding the implications of geopolitical dynamics for the sustainable development of air transport within ASEAN heading forward.

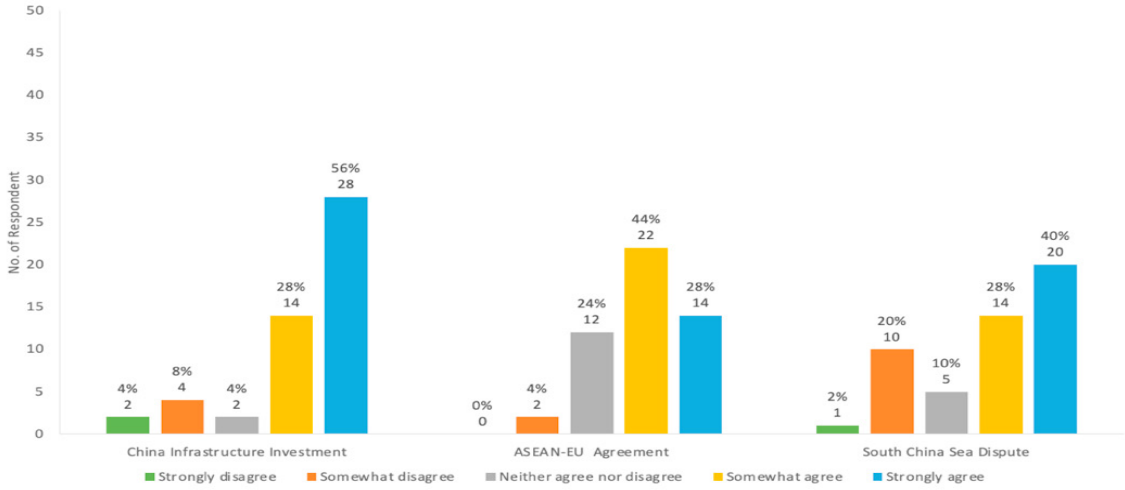


Fig. 3. Geopolitical Factors influencing regional air transport integration within ASEAN. Source: Author compiled using survey data from 2022.

The first question in this section (Q6a) explored respondents' perspectives on China's significant investment in air transport infrastructure in Southeast Asia as part of its Belt and Road Initiative (BRI). Most respondents (84%) agreed that China's substantial investment in air transport infrastructure through the BRI positively contributes to regional air transport cooperation and integration within ASEAN. This result indicates that the respondents perceive China's investments in infrastructure as an enabler of enhanced connectivity, improved transportation networks, and increased

opportunities for economic cooperation among ASEAN member states. On the other hand, 12% of respondents expressed disagreement with the statement. These dissenting views may stem from concerns related to the impact of China's investment on national sovereignty, and concerns related to economic dependency – especially in the case of Laos, where Laos holds a notably high public debt-to-GDP ratio in the region, with a significant portion owed bilaterally to China (The World Bank, 2020). These differing opinions underscore the complex dynamics surrounding China's investment in air transport infrastructure, and the need to assess potential benefits and drawbacks carefully.

Respondents were asked to provide perspectives on the 2022 air transport agreement between ASEAN and the EU. A majority (72%) agreed that the ASEAN-EU agreement could be interpreted as an attempt by the EU to challenge China's economic and political dominance in the region. Respondents perceived the agreement as a strategic move to strengthen ASEAN's position, and to promote a more balanced relationship with the major powers. However, 24% of respondents could not provide a definitive answer, indicating uncertainty or insufficient information to form an opinion. This suggests a need for further analysis or clarification regarding the motivations behind the ASEAN-EU air transport agreement, and its relationship with China's geopolitical ambitions. Notably, no respondents strongly disagreed with the statement.

Related to this was how respondents perceive the significance of South China Sea maritime disputes and their potential impact on the region's air transport development. Findings indicate a spectrum of views among the respondents. Most respondents (68%) agreed that these disputes have no material impact on ASEAN's regional air transport cooperation and integration. This is partly explained by the ASEAN practice of non-interference and the ASEAN Centrality policy wherein (1) at any air transport meeting, non-air transport issues are not discussed out of respect for member sovereignty; and (2) placing ASEAN at the centre of regional architecture "could make the Great Powers "comfortable" with the ASEAN-led institutions as "deliberative forums" within which to engage each other in confidence-building, and generate a shared understanding of regional security issues that might limit their rivalry and induce strategic restraint and counter-realpolitik behaviour in them" (Acharya, 2017, p.276). However, 22% of respondents disagreed, believing that the conflicts pose significant challenges or disruptions to infrastructure development or harmonisation efforts within ASEAN. According to multiple interviewees, Southeast Asia is becoming embroiled in the ongoing superpower rivalry between China and the United States. The US is actively criticising various transport infrastructure projects led by China in the region. An illustrative case is the development of Cambodia's Dara Sakor coastline, which incorporates a commercial international airport that has escalated tensions and strained diplomatic relations between the United States and Cambodia. Former United States Secretary of State Mike Pompeo argued in 2020: "The coastal development project at Dara Sakor could be used to host PRC military assets, and if so, would go against Cambodia's Constitution." (U.S Embassy in Cambodia, 2020, p.1).

7. Non-state actors

After analysing the role of states in the previous sections, the survey shifted focus to the influence of non-state actors; that is, airlines, airports, aerospace companies, regional organisations, international air transport associations, and passengers/consumers groups on the air market liberalisation and deregulation process in ASEAN. Respondents were asked to rate the extent to which selected non-state actors affect the process using a 10-point Likert-type item.



Fig. 4. Non-state actor influence in ASEAN air transport integration. Source: Author compiled using survey data from 2022

Airlines, consumers and regional organisations were identified as the most influential non-state actors with airlines perceived as being the most critical, with an average rating of 8.3. The influence of airlines is likely attributed to their economic importance, market power and ability to drive changes in industry practices – specifically, the role of low-cost airlines in the region.

Passengers and consumers were regarded as possessing a notably substantial level of influence, as indicated by an average rating of 7.2. The significance of consumers' impact becomes even more pronounced due to the rising middle class with more substantial purchasing power within the ASEAN region. It is essential to note that their opinions and preferences can indirectly shape the industry through market demands and consumer advocacy. However, in ASEAN member states, aviation consumer protection primarily operates within national-level consumer protection frameworks. Generally, there are no additional sector-specific regulatory measures besides implementing the Montreal Convention (1999), except for Malaysia and the Philippines. Malaysia has the Malaysian Aviation Consumer Protection Code 2016, overseen by The Malaysian Aviation Commission (MAVCOM), while in the Philippines has civil aviation consumer protections which are supervised by the Civil Aeronautics Board (ASEAN, 2018; ICAO, 2022). In order to formally recognised passenger rights in the region, according to *Interviewee 5* (academia - air transport), consumer NGOs in ASEAN could utilise the 2022 ASEAN-EU Comprehensive Air Transport Agreement which aims to achieve a high level of consumer protection, while also recognising the importance of cooperation in this aspect.

Regional organisations were also regarded as influential non-state actors, with an average rating of 7.0. This signifies that respondents recognise the importance of ASEAN in fostering cooperation, setting standards, and facilitating policy coordination among its member states. ASEAN contributes to harmonising regulations and promoting shared goals in air transport integration. Airports received an average rating of 6.2, reflecting their role as crucial infrastructure providers and facilitators of air connectivity. The influence of airports may stem from their ability to attract airlines and passengers, and their involvement in regulatory processes and development plans. International air transport associations and aerospace industries were rated as having lower levels of influence, with average ratings of 5.5 and 4.9, respectively.

The open-ended section of the survey received 32 additional comments which were thematically analysed and grouped into two main categories. Twenty-one comments suggested that 'tourism-related industries' should be considered a crucial non-state actor driving air market liberalisation and integration in ASEAN. These comments highlight the multifaceted relationship between tourism and air travel, as both industries are profoundly interconnected and mutually influential (Law et al., 2022; Spasojevic, Lohmann and Scott, 2018). The remaining 11 comments highlighted the significant role of ‘businesses' and emphasised how companies and multinational corporations play a crucial part in shaping the aviation sector. A notable illustration is Cambodia, which achieved a milestone by surpassing the 10-million inbound air passenger mark in 2018. This achievement can be attributed to robust investments made across diverse sectors within the country.

8. Policy implications

The policy implications for governments, institutions and organisations – both within the ASEAN bloc and outside it – of ongoing efforts to more closely integrate air transport across the region are many and varied. What does seem clear is that politics will continue to play an outsized role in shaping the future prospects for closer air transport integration for ASEAN. While national interests and air market protectionism remain strong in the region, it is also true that mutual interests and market growth are also powerful motivators for ASEAN member states. Individual member states, along with aviation-related companies and regulatory bodies, would be well counselled to prepare for a progressively more open and integrated regional future, even if this proves patchy and uneven across the bloc. Slower progress than planned is not the same as little to no advancement, and ASEAN single air market ambitions have proved to be stubbornly resilient in the face of a multitude of barriers and sceptical assessments.

One pivotal area where ASEAN member states could strengthen efforts toward more comprehensive air market integration is via empowering consumers to then apply increased pressure on governments to further liberalise the air transport sector. A rising ASEAN middle class, and a growing propensity to fly, are not yet mirrored in more robust consumer protections and safeguards for most countries in the region. It is in this regard that the European model (and

a lesser extent the US), provide a sense of how member states in ASEAN could embolden consumer advocacy, and in consequence, create momentum for change. In fact, ASEAN need look no closer to home than Malaysia and the Philippines to see how this can be achieved and implemented.

9. Conclusion

ASEAN demonstrates the central role that aeropolitics plays in the global air transport industry, especially with respect to regional air market integration aspirations and efforts. While this study has shown the power and influence of politics in the region and across the industry, it has also helped to reveal that national interests, protectionism and vested interests are all counterbalanced by a genuine desire in ASEAN for meaningful and substantive liberalisation of air markets. The industry may not be witnessing a European-style single aviation market model unfolding in Asia; however, it is evident that regional divisions and obstacles are being eroded over time – the ASEAN way is not inertia in disguise, but rather progress in a different form. Similar developments are observable in other regional air markets, particularly in developing economies like the Middle East, Africa, and Latin America. This raises the question of how aeropolitics can provide insights into the nature of these regional air markets, and how this understanding can contribute to their advancement? ASEAN is at the vanguard in addressing these questions in future.

References

Acharya, A., 2017. 'The myth of ASEAN centrality?', Contemporary Southeast Asia, 39(2), pp. 273–279.

ASEAN, 2016. Master Plan on ASEAN Connectivity 2025. Jakarta. Available at: www.asean.org (Accessed: 6 August 2023).

ASEAN, 2018. Handbook on ASEAN Consumer Protection Laws and Regulations. Jakarta. Available at: www.asean.org (Accessed: 25 July 2023).

ASEAN, 2019. ASEAN Integration Report 2019. ASEAN Secretariat Jakarta. Available at: www.asean.org (Accessed: 22 May 2022).

ASEAN, 2022. Plan of Action to Implement the ASEAN-United States Strategic Partnership (2021-2025)., ASEAN Available at: https://asean.org/asean2020/wp-content/uploads/2021/03/15.-ASEAN-US-Plan-of-Action-2021-2025-Final.pdf (Accessed: 2 May 2023).

ASEAN, 2015. Kuala Lumpur Transport Strategic Plan (ASEAN Transport Strategic Plan) 2016-2025. Jakarta. Available at: https://www.asean.org/storage/2016/01/11/publication/kuala_lumpur_transport_strategic_plan.pdf (Accessed: 29 June 2021).

CAPA, 2018. Garuda-Sriwijaya tie up: an Indonesian domestic aviation duopoly? Centreforaviation.com., CAPA Available at: https://centreforaviation.com/analysis/reports/garuda-sriwijaya-tie-up-an-indonesian-domestic-aviation-duopoly-448786 (Accessed: 4 June 2023).

Chongkittavorn, K., 2015. ASEAN Lane Shows ASEAN Spirit – and Lack of It., Reporting ASEAN Available at: https://www.reportingasean.net/asean-lane-shows-asean-spirit-lack/ (Accessed: 8 August 2023).

Elder, L., 2015. 'Malaysian Airlines, Neoliberalism and Business as Usual in Malaysia', Asian Journal of Social Science, 43(1–2) Brill, pp. 23–49. (Accessed: 2 June 2023).

Forsyth, P., King, J. and Rodolfo, C. L., 2006. 'Open skies in ASEAN', Journal of Air Transport Management, 12(3), pp. 143–152.

Gootiiz, B. and Mattoo, A., 2015. Regionalism in Services A Study of ASEAN. Available at: http://econ.worldbank.org. (Accessed: 1 May 2021).

Heracleous, L., Wirtz, J. and Pangarkar, N., 2009. Flying High in A Competitive Industry: Secrets of the World's Leading Airline. Singapore: McGraw-Hill Education

ICAO, 2022. Overview of Regulatory and Industry Developments in International Air Transport. Montreal. Available at: https://www.icao.int/Meetings/a41/Documents/Overview_of_Regulatory_and_ Industry_Developments_in_ International_Air_Transport.pdf (Accessed: 8 April 2023).

Jane Fox, S. and Ismail, R., 2017. 'The skies the limit! Collaborating to open the skies with China - Challenges and opportunities', European Journal of Comparative Law and Governance, 4(4) Brill Nijhoff, pp. 387–422.

Jusoh, S. and Haris, Z., 2021. 'Integrating ASEAN through Liberalisation of Investment in the Aviation Sector', in Lee, J. W. (ed.) In Aviation Law and Policy in Asia: Smart Regulation in Liberalized Markets. Leiden: Brill Nijhoff, pp. 269–284.

Law, C.C.H., Zhang, Y., Gow, J. and Vu, X.B., 2022. 'Dynamic relationship between air transport, economic growth and inbound tourism in Cambodia, Laos, Myanmar and Vietnam', Journal of Air Transport Management, 98 Pergamon, p. 102-161. (Accessed: 9 August 2023).

Lee, D., 2015. The European and Southeast Asian Single Aviation Markets. Background Brief No. 15 European Union Centre in Singapore. Singapore. Available at: http://aei.pitt.edu/67356/1/BB15-EU-and-ASEAN-aviation.pdf (Accessed: 3 May 2021). pp. 2-16

Lee, J.W., 2019. 'ASEAN air transport integration and liberalization: A slow but practical model', in ASEAN Law in the New Regional Economic Order: Global Trends and Shifting Paradigms. Cambridge University Press, pp. 186–206.

MAVCOM, 2019. Position Paper Malaysia's Airports Industry Structure. MAVCOM. Available at: https://www.mavcom.my/wp-content/uploads/2019/12/191204-Position-Paper-Malaysias-Airports-Industry-Stucture.pdf (Accessed: 25 January 2023).

Hsieh, P. L., and Mercurio, B., 2019. 'ASEAN Law in the New Regional Economic Order: an Introductory Roadmap to the ASEAN Economic Community', in Pasha L. Hsieh and Bryan Mercurio (eds.) ASEAN Law in the New Regional Economic Order: Global Trends and Shifting Paradigms. Cambridge University Press. pp 3-21

Permana, P., Hoen, H.W. and Holzhacker, R.L. (2020) 'Political Economy of ASEAN Open Skies Policy: Business Preferences, Competition and Commitment to Economic Integration', Journal of Asian Economic Integration, 2(1) SAGE Publications, pp. 44–61.

Siew Yean, T., 2019. 'ASEAN Trade in Services Agreement (ATISA): Advancing Services Liberalization for ASEAN?' ISEAS Perspective. ISEAS. Singapore. Available at: https://www.iseas.edu.sg/images/pdf/ISEAS_Perspective_2019_54.pdf (Accessed: 1 February 2022).

Saraswati, B. and Hanaoka, S., 2013. 'Aviation policy in Indonesia and its relation to ASEAN Single Aviation Market', Journal of the Eastern Asia Society for Transportation Studies, Vol. 10, pp. 2161–2176.

Spasojevic, B., Lohmann, G. and Scott, N., 2018. 'Air transport and tourism–a systematic literature review (2000–2014)', Current Issues in Tourism, 21(9) Routledge, pp. 975–997. Available at: 10.1080/13683500.2017.1334762 (Accessed: 9 August 2023).

Tan, A.K.-J., 2006. 'Prospects For A Single Aviation Market In Southeast Asia', Annals of Air and Space Law, Vol. 34. pp 253-284

Tan, A.K.-J., 2014. The ASEAN Single Aviation Market: Liberalizing the Airline Industry. ERIA Policy Brief. Jakarta. pp 1-8

Tan, A.K.-J., 2013. Toward a Single Aviation Market in ASEAN: Regulatory Reform and Industry Challenges. ERIA Policy Brief. Jakarta. (Accessed: 28 April 2021).

Tan, A.K.-J., 2009. Challenges and Strategies for Liberalising Vietnam's Airline Industry., Australian Journal of Asian Law. Vol 11. Pp 218–246 (Accessed: 3 May 2021).

The Sun Daily, 2015. ASEAN Lane creates ASEAN identity, notes Philippine envoy, Thesundaily.com, 4 May. Available at: https://www.thesundaily.my/archive/1407408-FSARCH307743 (Accessed: 8 August 2023).

The World Bank, 2020. From Landlocked to Land-Linked: Unlocking the Potential of Lao-China Rail Connectivity. Washington.

Trihermato, F., 2019.,Indonesia's domestic flight industry: an unstoppable duopoly? | Australia-Indonesia Centre., he Australia–Indonesia Centre Available at: https://australiaindonesiacentre.org/trade/indonesias-domestic-flight-industry-an-unstoppable-duopoly/ (Accessed: 4 June 2023).

U.S Embassy in Cambodia, 2020. The United States Sanctions Chinese State-Owned Entity for its Role in Corruption in Cambodia - U.S. Embassy in Cambodia., U.S Embassy in Cambodia Available at: https://kh.usembassy.gov/the-united-states-sanctions-chinese-state-owned-entity-for-its-role-in-corruption-in-cambodia/ (Accessed: 10 May 2023).

Zuan, H., Ellis, D. and Pagliari, R., 2021. 'Geopolitics and the ASEAN single aviation market: Aspirations versus realities', Transportation Research Procedia, 59 Elsevier, pp. 95–104. Available at: 10.1016/J.TRPRO.2021.11.101 (Accessed: 16 February 2022).



https://dspace.org/

Expert insights into the impact of aeropolitics on regional air market integration in ASEAN

Zuan, Haris; Ellis, Darren; Pagliari, Romano

2023-12-28
Elsevier
https://doi.org/10.1016/j.trpro.2023.12.027
Zuan H, Ellis D, Pagliari R. (2023) Expert insights into the impact of aeropolitics on regional air market integration in ASEAN. Transportation Research Procedia. Volume 75, December 2023, pp. 240-249

Downloaded from a DSpace repository. https://dspace.org/