



# STATE AID SCHEMES IN AVIATION SECTOR IN TIMES OF THE CRISIS CAUSED BY COVID-19 AS A TOOL TO REVITALIZE THE SECTOR

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## Abstract

*This article is focused on state aid schemes as a tool to revitalize the sector in times of crisis COVID-19. The aim of the article is a comprehensive analysis of state aid in air transport and the subsequent proposal of measures to revive the sector and a proposal for changes in the air transport market after the coronacrisis. Article defines the various stages of state aid in air transport in the past as well as during the crisis caused by the spread of COVID-19. There are analyzed approaches to dealing with state aid to airlines and airports before and during the crisis. At the same time, the article also focuses on the impact of the coronacrisis on air navigation service providers. In the end are identified key components to revitalize air transport and the proposal of changes in the air transport sector caused by the coronacrisis*

## Keywords

*Coronacrisis, Airlines, Airports, Air navigation service providers, State aid, COVID-19*

## 1. INTRODUCTION

The COVID-19 pandemic began in late 2019 in China. It gradually spread around the world. The onset of the COVID-19 viral disease is also linked to the crisis that has hit economies around the world. The coronary crisis has also hit the air transport industry hard. The effects of the crisis were felt at the outset. Flights have been phasing out all over the world and strict measures have been put in place to prevent the spread of the disease.

The total volume of transport fell by more than 80%. In air transport, state aid was provided to individual entities even before the crisis, which arose due to the spread of COVID-19. The work deals with the analysis of the rules of state aid before the coronary crisis and its individual stages, which were linked to the development of the air transport market and the entities that operate on it. It focuses on the analysis of specific cases of state aid to selected airlines and airports. The examples illustrate the basic principles and point to the European Commission's response to individual state aid, as well as the argument as to whether state aid complied with the established rules and whether or not it was justified. The onset of the coronary crisis was an unexpected blow to air travel. Even though the industry has already gone through many crises, the coronary crisis is the biggest crisis that has hit the aviation industry and has not been prepared for it. In response, temporary frameworks were adopted to assist Member States of the European Union in providing state aid.

## 2. STATE AID IN THE AIR TRANSPORT SECTOR

### 2.1. First stage

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### 2.2. Second stage

The second stage was subject to the rules based on the 2005 legal framework. In the Community Guidelines on airport financing and start-up aid for airlines departing from regional airports 2005 / C 312/01, it classifies airports into four categories according to passenger numbers. The Guidelines also define the categories of airport activities for which State aid may be granted under certain conditions:

- construction of infrastructure and airport facilities,
- infrastructure operation,
- supply of airport services related to air transport,
- public funding of services of general economic interest [1].

### 2.3. Third stage

The third is defined by the emergence of new state aid rules in 2014. The EC has issued rules that have simplified access to state aid while allowing for better prioritization of state aid enforcement activities. The rules also supported the improvement of the efficiency of drawing public resources. The rules define:

- investment aid,
- operating aid,
- start-up aid for airlines,
- state aid in the form of public service compensation, social help [2].

## 2.4. Fourth stage

The 2014 EC Communication set out the legal framework under which state aid was provided to airports and airlines. Air transport has evolved, faced new situations and the EC has gained new experience. Therefore, in 2017, it revised part of the state aid rules. Practical experience has prompted the EC to adjust the rules for providing investment and operating aid so that:

- investment aid to airports with less than 3 million passengers per year does not distort competition (under certain circumstances),
- operating aid to airports with less than 200 000 passengers does not distort competition per year (under certain circumstances).
- To be adequate, investment aid should meet two conditions:
- the aid intensity should not exceed the allowable aid intensity given by category of airport,
- the amount of aid should not exceed the difference between the eligible costs and the operating profit of the investment [3].

## 2.5. Temporary framework for state aid to support the economy in the context of the Covid-19 pandemic

The EC has adopted a temporary framework that will allow Member States to benefit from the full flexibility provided by state aid rules, they could support the economy during the COVID-19 pandemic (hereinafter referred to as the "temporary framework"). The Temporary Framework, together with many other support measures that Member States may use under existing State aid rules, allows Member States to ensure that all companies have sufficient liquidity and maintain economic continuity during and after the COVID-19 pandemic [4].

## 3. EXAMPLES OF STATE AID

### 3.1. Examples of State Aid to Airports before Coronacrisis

State aid rules for airports have evolved gradually. As the rules evolved, states gradually began to notify state aid to airports. The EC gradually published the notified state aid. Between 2014 and 2018, only seven Member States notified investment aid to airports (France, Ireland, Germany, Italy, Lithuania, Estonia and Hungary). The Irish National State Aid Scheme for Airports was the first to be notified to the EC under the 2014 EC Guidelines.

While Ireland has applied the approach of the common bilateral state aid scheme for regional airports, which includes both operating and investment aid, France has notified three separate national state aid schemes for regional airports. State aid was in line with the structure of the guidelines. In addition, France notified investment aid to Tarbes Airport in an individual application in 2016. The airport is one of the smaller airports that carries around half a million passengers a year [5].

### 3.2. Examples of State Aid to Airlines before Coronacrisis

Alitalia is an Italian airline that provides domestic and international air transport, maintenance, ground handling and cargo services. The company has been at a loss since 2008. At the beginning of 2017, Alitalia needed funds, but due to the deteriorating financial situation, it did not have access to any credit. For Alitalia to continue in operation, Italy provided the company with two loans of EUR 600 million and EUR 300 million in May and October 2017. At the same time, Alitalia was placed in a special insolvency procedure under Italian insolvency law. A year later (2018), the EC launched an investigation to determine whether the two loans complied with EU state aid rules. The EC concluded that two € 900 million state loans granted by Italy to Alitalia in 2017 were illegal under EU state aid rules. Italy must therefore recover unlawful State aid plus interest from Alitalia. The investigation showed that when granting the two loans to the company, Italy did not proceed as it should. The State did not assess in advance the likelihood of repayment of the loans plus their interest. Following the investigation of the case, the EC stated that the State loans to the carrier distorted competition [6].

Another example, Cyprus Airways has received a lot of public money since 2007, but has failed to restructure and become viable without continued state support. Cyprus Airways therefore had to repay all state aid received, which is generally incompatible with the EU, which, according to the EC, amounts to more than € 65 million plus interest. In particular, the EC found that Cyprus Airways did not have a realistic prospect of becoming viable without continued state subsidies [7].

### 3.3. Impact of the Covid-19 pandemic on air transport

During 2020, Covid-19 developed into a pandemic that posed a global risk to our health and global economies. Across all sectors, the aviation sector is probably one of the sectors most affected by the coronary crisis. The unprecedented drop in passenger demand has led to the suspension of most airlines. Many companies had to close almost all of their activities and ground their entire fleets. Repatriation and cargo flights were performed. This initially had a strong impact on the number of international flights as well as the number of domestic flights. March 2020 can probably be considered the month with the lowest number of flights in modern aviation history [8]. Many airports closed their runways and they were subsequently used to park unused aircraft.

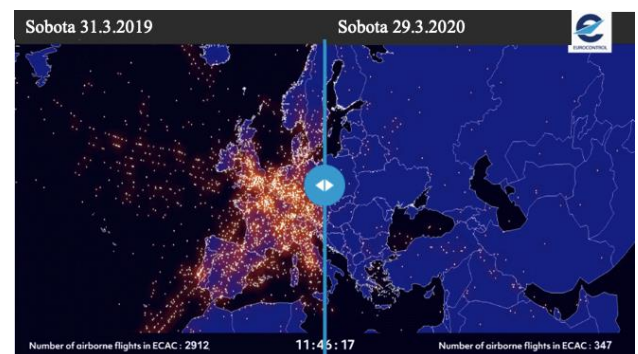


Figure 1 Comparison of airspace utilization in March 2019 and March 2020 [<https://www.eurocontrol.int/covid19>]

### 3.4. State Aid to Airports during the Coronacrisis

Saarbrücken Airport is a small regional airport located in the German state of Saarland. It is operated by Flug-Hafen-Saarland. In 2017, the EC approved € 12 million state operating aid for Saarbrücken Airport valid until 2019. Germany announced its intention to provide additional operating aid to the airport by 2024. The EC assessed the case and found that while 2019 the airport saw an increase number of passengers, the airport has seen a drop in passenger numbers since the beginning of the coronary crisis. This was due to the gradual introduction of measures against the spread of the Covid-19 virus in Germany, but also in other countries. It took these exceptional circumstances into account in the assessment. The EC also concluded that the aid would help improve citizens' connectivity and facilitate regional development. At the same time, it will not distort competition in the single market. The EC approved state aid on 12 May 2020 [9].

### 3.5. State Aid to Airlines during the Coronacrisis

The EC has approved state aid of € 7 billion in line with EU state aid rules. The State aid consisted of a State loan guarantee and shareholder loans to Air France to provide urgent liquidity to the company. The EC explained the approval of the aid by saying that the aviation industry is important in terms of jobs and connectivity. Also, in connection with the spread of the Covid-19 virus in other countries, Air France played an important role in the repatriation of citizens and in the transport of medical supplies. In addition, France has announced so-called "green plans" in relation to Air France.

The aid therefore also covers certain environmental obligations of Air France, such as:

- reducing the number of domestic flights on routes of less than 2 hours 30 minutes if there is an alternative rail service (and limiting such flights to transfers to hub airports),
- 50% reduction in CO2 emissions from flights over mainland France by the end of 2024,
- 50% reduction in CO2 emissions per passenger per kilometre by 2030,
- implement 2% of sustainable alternative fuels by incorporating them into fuel tanks by 2025,
- future investments must be directed towards the development of medium and long-distance routes [10].

The EC approved state aid from Germany (June 25, 2020) to contribute € 6 billion to the recapitalization of Deutsche Lufthansa AG (DLH). The company is the parent company of the Lufthansa Group. The recapitalization measure is part of a larger package, which also includes a state guarantee for a loan of EUR 3 billion. Germany plans to grant the loan to DLH as individual aid. Lufthansa has committed to make slots and additional assets available at its main airports in Frankfurt and Munich. This gives competing carriers a chance to take advantage of these slots [11].

### 3.6. Impact of the Corona Crisis on Air Navigation Service Providers

Airlines lacked the necessary liquidity, and in response, the European ANSPs helped the airlines by agreeing to defer payments for the provision of air navigation services. The 41 Member States of Eurocontrol, which coordinates air traffic control operations across Europe, voted to postpone the payment of February fees to November 2020, with payments for March, April and May postponed to 2021. IATA thanked the Eurocontrol Member States and the European ANSP for solidarity.

In view of the coronary crisis, measures were also taken in the third reference period. Rules have been adopted governing the consequences of the late adoption of performance plans set out in the EU Implementing Regulation of 2020/1627. They have been adjusted to mitigate the adverse financial impact and to avoid high volatility in unit rates for liner and terminal services [12].

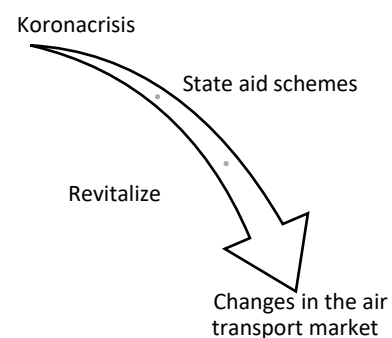
## 4. RESEARCH METHODOLOGY

Based on the available information provided on the website ec.europa.eu, performed analyzes and interpretation of the conclusions of the comparison of approaches, the aim of the thesis is to suggest possible approaches to the recovery of air transport in times of crisis caused by COVID-19, which may be mainly in the form of state aid.

## 5. PROPOSAL OF APPROACHES TO THE RECOVERY OF AIR TRANSPORT IN THE TIME OF CRISIS CAUSED BY COVID-19

Based on the complex analyses of the literature review, detailed analyzes of examples of state aid to airlines and airports before crises and during it were defined the results of the research. State aid schemes at the time of the coronary crisis brought:

- revival of air transport,
- changes in the air transport market.



Picture 1 – Influence of coronacrisis [Source:Authors]

### 5.1. Reviving Air Transport

After complex analyzes were defined the key components that help revitalize air traffic in times of corona crisis:

- time of granting state aid,
- amount of aid provided,
- conditions for providing assistance,

- interest in air transport services.

### 5.1.1. Time of State aid

Airlines and airports began to experience a sharp drop in demand at the outset of the crisis. At the time of the coronacrisis, the speed of state aid was crucial. The EC also pointed out this fact. Despite the fact that airports and airlines were losing the necessary liquidity at this time, there were cases where EU Member States notified aid late. In the case of airports, state aid was quickly granted in Belgium. In Slovakia, state aid was provided to airports faster than air carriers, but in both cases it can be stated that the aid came late.

A good example of a rapid response is France, which has helped mitigate the effects of the crisis on airlines by allowing French airlines to defer payments in March 2020. About a month later, it notified another state aid scheme. It provided 7 billion euros for Air France. On the other hand, Slovakia notified state aid to airlines only at the end of 2021. That is more than a year and a half later, since the first state aid to airlines was announced. Slovakia addressed the issue of state aid to airlines late. In the meantime (01.09.2020), the Slovak air carrier Go2Sky terminated its activities. The owner saw as the main reasons for the end of the company that since March 2020 the company was financed from its own resources and they could not agree with the owners of the leased aircraft on further cooperation. The company was able to agree only until the end of August 2020, they could no longer agree on the month of September. The same problem was in the Czech Republic. The Smartwings group was ignored by the Czech Republic when it asked for help. Finally, they received state aid [13].

### 5.1.2. Conditions for granting state aid

Some EU Member States have provided public support to stakeholders in the aviation sector. During the coronacrisis, there were cases where support was provided with well-defined conditional rules that created some form of conditions. State aid conditions increased the chances of the EC scheme being approved. Given the EU's goal of reducing emissions, the conditions that led to the reduction were welcome. France and Germany are examples of such state aid. Germany conditioned its aid on modernizing the fleet. France has embarked on tighter emission reductions. For flights of less than two and a half hours, rail transport will be preferred and the future direction of investment on longer routes will divert Air France from domestic flights over the mainland. This pushes carriers to greener and more efficient transport. Despite the positive shift towards reducing emissions, this leaves room for carriers from countries that are not constrained by similar conditions.

### 5.1.3. Interest in air transport

Not only airlines but also airports are dealing with the recovery of their activities during the coronacrisis. Airlines and airports need people to trust air traffic again and to be able to travel. According to the International Airports Council (ACI), interest in air travel is a key factor in reviving airports during the coronacrisis. During the crisis, when flights were canceled, some of the connections offered were reassessed.

The overall recovery will be driven mainly by domestic transport and international transport will experience a slower recovery

(worldwide, domestic transport accounted for 58% of total passenger transport in 2019).

## 5.2. **Changes in the Aviation Market**

Based on the results of research can be declared that the aviation industry will be partially changing. The coronary crisis helped to accelerate some of the trends that had emerged before the crisis. We think that the impact of the coronary crisis will also:

- "greener" transport,
- higher degree of digitization,
- departure from short-haul flights,
- modernization of air transport,
- a partial change in the business model of some airlines.

### 5.2.1. Airlines

National carriers were the first to receive state aid. Lufthansa and AirFrance are examples of receiving state aid when they need it. The conditions for the provision of aid, which were approved by the EC, were set so that after the aid was granted, the carriers were "greener" and greener. This trend was evident even before the coronacrisis. Airlines have started to make more use of the potential of new trends. They modernized their fleets, went through digitization, and all this led to more efficient and "greener" operations. The coronacrisis will accelerate this trend. In order for airlines to qualify for state aid and in the meantime decommission less efficient aircraft.

Also, we think that the business model of traditional air carriers will partially change under the conditions that existed in the provision of state aid at the time of the coronacrisis. The modernization of the fleets will lead to their unity. This should mean a reduction in maintenance costs, and at the same time new aircraft models are also characterized by more efficient, "greener" operation. Air France's state aid is an example of the abandonment of short-haul flights. The EU is pushing for greener and more sustainable transport. The coronacrisis has helped airlines become greener and partially change their business model. At the time the measures were the toughest, the airlines did not serve food on board. This did not affect them and later they resumed serving food on board.

### 5.2.2. Airports

In the past, the International Airports Council (ACI) has developed rules for determining the quality coefficient of airports and the services they provide (SQ1-SQ12). The coronacrisis has fundamentally influenced and emphasized the importance of some of the selected rules, which has led to greater emphasis on some of them, namely:

- the number of days in a calendar year that passengers in an open terminal must stand in line for more than 30 minutes before passing the security check (QS1),
- the number of quarters in the calendar year in which the airport violated the ACI rule, which says "terminal cleanliness" (QS6),

- the number of quarters in the calendar year in which the airport violated the ACI rule, which says "toilet cleanliness" (QS7),
- the number of quarters in the calendar year in which the airport violated the ACI rule, which states "airport facilities in the field of communications, electronic communications and business communications support" (QS12).

### 5.2.3. ANSP

The provision of air navigation services has been liberalized in only a few countries and has not affected the sector as a whole. However, the commercialization of individual ANSPs has become more frequent, especially in the last ten years [14]. This is a radical departure from the old way of thinking of air navigation service providers. The commercialization of ANSP is described as a process that includes new ways of financing and managing organizational and ownership structures. This is one way of modernizing the provision of air navigation services. In general, the EC has often spoken of competition and modernization in the provision of state aid. ANSPs will look for ways to increase revenue. At the same time, however, they will face competitive challenges due to gradually increasing commercial trends. Therefore, we think that the commercialization of ANSP will be one of the tools to revive the market. However, there are many perspectives on the commercialization of ANSP. IATA understands commercialization not only as a change in organizational and ownership structures, but also as the orientation of ANSP services to commercial revenue. However, IATA recommends that commercialization should never lead to a conflict between public and commercial interests.

### 5.3. Overview of Changes as well as Proposals for Changes

In the following section, is offered an overview of the changes and proposed changes caused by the coronary crisis. The provided proposals will help air transport to be stronger and more resilient during and after the crisis. At the same time, the proposals offer the possibility of further direction of air transport market and defined the changes in the position of individual entities (airlines, airports, ANSP).

TABLE 1: TABLE I. PROPOSALS FOR APPROACHES TO THE REVIVAL OF AIR TRANSPORT DURING THE CORONARY CRISIS [SOURCE:AUTHORS]

	Before coronacrisis	Change
<b>A fleet of traditional carriers</b>	Inconsistent	Higher degree of uniformity
<b>Airline Alliance</b>	Uncertain attitude in some companies	Guarantee of higher security from membership, which can be an incentive to join the alliance
<b>Low-cost carriers</b>	Growth in the number of virtual carriers	Transformation to a virtual carrier model

<b>Carrier fleets</b>	Focused on the possibility of transporting a large number of passengers	Airlines' focus on more efficient and environmentally friendly aircraft
<b>Security check</b>	The traditional way	Gradual introduction of "contactless" security control
<b>Digitization</b>	Waiting in line	Greater use of smart technologies such as smartphone
<b>ANSP</b>	Services of general interest	Commercialization of ANSP

The EU's goals of creating a sustainable market economy with high competitiveness and protecting the environment as well as improving its quality are also reflected in the provision of state aid. The state aid provided to individual air carriers during the coronary crisis pushed for air transport to be "greener" and more modern. We think that making state aid conditional on fleet modernization is the right step to revitalize the sector and "start" changes in a certain part of the sector, which will then lead to its partial restructuring. Such modernization will bring new types of aircraft that are more economical and modern. At the same time, it will help to suppress the possible replacement of air transport by another mode of transport that is considered "greener". At the same time, the results of our research have shown that membership in the airline alliance has demonstrably increased a certain degree of certainty for airlines, which could lead to a change in the attitudes that airlines had before the coronary crisis.

Defined as well as proposed changes may also affect the business model of airlines. Based on the above, it is possible to accept a possible assumption of the need to change the business model of airlines, especially towards an even more significant hybridization of the traditional model of the air carrier.

Measures at the time of the coronary crisis pushed for the use of contactless means, which put pressure on the development of devices that would allow contactless security control in several forms. In combination with applications in the smartphone, it is possible to achieve shorter time spent in lines as well as shorten the total time that passengers must spend at the airport before departure.

In the case of ANSP, the approach to their activities does not change in any fundamental way, but precisely the need to reduce costs, resp. increasing revenue at a time when this is not possible by increasing the number of aircraft in the airspace leads to the only possible alternative that could help ANSPs, namely commercialization, which is a way to modernize ANSPs, but it is not easy and the recommendations need to be followed IATA.

### CONCLUSION

COVID-19 disease began to spread in China in December 2019. It didn't take long for the virus to cross the border and spread

around the world. The COVID-19 pandemic was not only a health crisis but also an economic crisis. It has affected every sector of the economy. Air transport and tourism were the most affected sectors. Strict measures, border closures and cancellations have caused one of the biggest crises in air transport.

The aim of the article is to propose approaches and changes that lead to the revival of air transport during the coronary crisis. It defines the forms of state aid that can be one of the tools to revitalize air transport and affected economies. In order to be able to define the attributes that have a major impact on the recovery of the industry as well as the changes that have occurred in the industry, respectively. To define changes that could be permanent and not only temporary, an analysis of state aid before and during the coronary crisis was needed. The first chapter describes how state aid in air transport has developed. The state aid recorded four stages and gradually responded to the development of air transport. In response to the coronary crisis, the European Commission adopted a temporary framework to assist Member States in providing state aid. Selected state aid before and during the coronary crisis was further analysed. On this basis, can be explained basic principles and point to the European Commission's response to individual state aid. The European Commission's argument has helped us to identify the key attributes in the provision of state aid. A positive example is the state aid granted to Air France. They provided their help quickly and are committed to making the carrier greener. It is an example that has defined the direction of the industry. State aid to Air France was granted more quickly than in other cases and its conditions indicate the future direction of the sector, resp. changes in air transport.

We have come to key components in providing a proposal to revitalize air traffic during the coronation crisis. The key is time, volume, conditions of assistance and interest in air transport services. At the same time, based on the results of the research was concluded that this crisis will accelerate some of the trends that existed before the crisis. We also anticipate the changes that will occur. Hybrid airline business models will emerge more in the market. Aviation will feel the European Union's pressure to reduce emissions. We anticipate a shift away from flights to shorter routes of traditional carriers and the modernization of fleets. The new fleets of air carriers will be more environmentally friendly, and we also expect greater fleet uniformity. Airports felt pressure for cleanliness and were motivated to digitize their services more to ensure the highest possible level of contact lessness. Digitization and the use of smart devices have helped speed up check-in, and this is another positive step forward.

A detailed analysis and comparison of individual cases of state aid helped us to show that state aid as a tool to revive the sector and the coronary crisis led to the acceleration of trends, resp. led to changes.

The provision of state aid is a complex problem. A comparison of cases has shown an imbalance in the provision of state aid by Member States. We therefore propose that the European Union set up a group of experts to address this issue. This could provide more prompt and targeted assistance.

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