

Industrial relations and social dialogue

Representativeness of the European social partner organisations: Civil aviation sector



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Introduction

The aim of this representativeness study is to identify the relevant national and supranational social partners – that is, the trade unions and employer organisations – in the civil aviation sector and to show how they relate to the sector’s European-level organisations representing employees and employers. The report is divided into three parts: an overview of the economic specificities of and the employment trends in the civil aviation sector; an analysis of the social partner organisations in the 27 EU Member States; and an analysis of the relevant European organisations, in particular their membership composition and capacity to negotiate.

This section presents the objectives of the study along with a brief introduction to the chosen methodology. The context of this study is the European sectoral social dialogue committee (ESSDC) for the civil aviation sector, which was established in 2000.

0.1. Objectives of the study

Representativeness studies are conducted for three reasons.

- The European Commission aims to confirm the representativeness of the social partner associations consulted under Article 154 of the Treaty on the Functioning of the European Union (TFEU).
- Representativeness is one eligibility criterion for setting up or participating in an ESSDC.
- Representativeness means also having the capacity to negotiate agreements that can lead to an implementation by Council decision, as provided by Article 155 TFEU.

Representativeness is defined by the European Commission Decision on the establishment of Sectoral Social Dialogue Committees promoting the Dialogue between the social partners at European level (98/500/EC) (European Commission, 1998). For an organisation to be recognised as a representative EU social partner organisation, it must:

- relate to specific sectors or categories and be organised at European level
- consist of organisations that are themselves an integral and recognised part of Member States’ social partner structures, that have the capacity to negotiate agreements and that are representative of several Member States
- have adequate structures to ensure its effective participation in the work of the ESSDCs

To accomplish its aims, this study first identifies the relevant national social partner organisations in the civil aviation sector before analysing the structure of the sector’s relevant European organisations, in particular their membership composition. This analysis involves clarifying the unit of analysis at both national and European levels. The study includes only those organisations with membership domains classified as ‘sector-related’.

Besides the objectives mentioned, this study offers opportunities for future capacity building, as it may identify groups of workers whose interests are not yet represented at national level, or national organisations that are significantly representative in the sector but are not yet represented in the European sectoral social dialogue. A final purpose of this report is to update the previous Eurofound representativeness study for the civil aviation sector (Eurofound, 2010).

0.2. History of European sectoral social dialogue in civil aviation

Over the 30 years that European social dialogue has taken place in the civil aviation sector, it has been practised by different combinations of European organisations and in a variety of structural settings. In its

current composition, there are three European trade union organisations and seven European employer organisations involved in the ESSDC. The trade unions are (1) the European Transport Workers’ Federation (ETF), which organises all types of workers in the sector and workers from other transport sectors, (2) the European Cockpit Association (ECA), representing the pilots, and (3) the Air Traffic Controllers European Unions Coordination (ATCEUC), which organises air traffic controllers and other employees working in air traffic management (ATM).

There are two European associations representing trade unions that are currently recognised by the European Commission as organisations to be consulted under Article 154 TFEU and that also participate in the civil aviation ESSDC. These are ETF and ECA. While ATCEUC participates in the ESSDC, based on a cooperation agreement with ETF from 18 June 2009, it is not included on the list of organisations to be consulted under Article 154 TFEU.

ECA and ATCEUC represent only trade unions and professional associations of one specific professional group of workers in the sector. ECA represents pilots, and ATCEUC represents air traffic control officers (ATCOs). ETF represents all types of workers, including pilots and ATCOs.

The seven European employer organisations involved in the ESSDC are (1) the European Network Airlines Association (ENAA), (2) Airlines for Dialogue (A4D), (3) Airlines International Representation in Europe (AIRE), (4) the European Regions Airline Association (ERA), (5) Airports Council International Europe (ACI Europe), (6) Airport Services Association (ASA) and (7) the Civil Air Navigation Services Organisation (CANSO). Included on the list of organisations to be consulted under Article 154 of TFEU are ERA, AIRE, ACI Europe, ASA Europe and CANSO.

Table 1: Organisations participating in the civil aviation ESSDC

Representing workers	Representing employers
European Transport Workers’ Federation (ETF)	European Network Airlines Association (ENAA) (previously called Airline Coordination Platform (ACP))
European Cockpit Association (ECA)	Airlines International Representation in Europe (AIRE)
Air Traffic Controllers European Unions Coordination (ATCEUC)	European Regions Airline Association (ERA)
	Airlines for Dialogue (A4D)
	Airports Council International Europe (ACI Europe)
	Airport Services Association (ASA)
	Civil Air Navigation Services Organisation (CANSO)

Notes: An assessment of these European social partner organisations will be made in Chapters 6 and 7. Organisations shaded in grey are included in the list of organisations to be consulted under Article 154 TFEU. The other organisations in white participate in the ESSDC, but are not included on that list.

Source: European Commission (undated)

The ESSDC for the civil aviation sector was established in 2000, although its origins lie in a joint committee that was formally established in 1990. Based on Commission Decision 90/449/EEC of 30 July 1990, a joint committee for the civil aviation sector was established by one European trade union organisation and five

European employer organisations.¹ The civil aviation ESSDC replaced the 1990 joint committee, according to Article 7 (1) (b) of Commission Decision 98/500/EC. In 2003, three subsector working groups were created for aircrew, for ATM and for ground handling activities, besides the ESSDC plenary meetings for the entire sector. This sector thus covers different types of civil aviation activities that are dealt with in the three working groups that are part of the civil aviation ESSDC.

The employer organisations ERA and ACI Europe² were in the original joint committee and are still in the ESSDC. The same is true of ETF, but it changed name in 1999, before the formal establishment of the civil aviation ESSDC in Commission Decision 98/500/EC. It was previously referred to as FST. Other organisations have changed name and/or membership domain over the years but have a link with one of the original organisations from 1990. In addition, there have been significant changes in the organisational landscape over 30 years of European social dialogue on civil aviation, with organisations representing specific interests concluding more sector-oriented joint texts. From 2001 to 2011, the three working groups produced joint opinions. The working group on ATM produced most of the texts, which was also the case in 2012–2016. The ground handling working group produced no opinions in the latter period. In the context of the impact of the COVID-19 pandemic on the entire aviation sector, the published opinions are again more concerned with the entire sector. Table 2 groups developments into periods. They are itemised in more detail in Table 121 in section 8.2.

Table 2: European organisations co-signing joint opinions and texts regarding civil aviation matters

Period	Aircrew	Air traffic management	Ground handling
1990–1994 (11 texts)	FST (FST became ETF in 1999) AEA, European Communities Independent Airlines Association, Air Chartered Carrier Association, ERA, ICAA		
1995–2000 (1 agreement)	ETF, ECA AEA, ERA, IACA		
2001–2011 (25 texts)	ETF, ECA AEA, ERA, IACA (6 texts)	ETF, ATCEUC (since 2009) CANSO (15 texts)	ETF ACI Europe, ERA, IACA, IAHA (4 texts)
2012–2016 (7 texts: 5 opinions, 1 set of guidelines, 1 toolbox)	ETF, ECA AEA, ERA, IACA (2 opinions) (AEA stopped existing in 2016) (IACA became AIRE in 2017)	ETF, ATCEUC CANSO (3 opinions, 1 toolbox, 1 set of guidelines)	No texts in this period (IAHA became ASA in 2011) (IACA became AIRE in 2017)
2017–2021 (12 texts)	ETF, ECA ENAA, A4D, ERA, AIRE (6 texts)	ETF, ATCEUC CANSO (3 texts)	ETF ACI Europe, ASA, AIRE, ENAA, A4D, ERA (3 texts) ³

Notes: IACA, International Air Carrier Association; IAHA, Independent Aviation Handlers Association. European trade union organisations are marked in red, and European employer organisations in blue.

Source: European Commission, Social dialogue texts database

¹ The European social partners mentioned in Commission Decision 90/449/EEC were the Committee of Transport Workers' Union of the European Community (FST), and five organisations representing the airlines and airport associations on the employers' side: the Association of European Airlines (AEA), the European Regional Airlines Organization (now ERA), the European Communities Independent Airlines Association (ACE), the Air Chartered Carrier Association (ACCA), and the International Civil Airports Association Europe (ICAA).

² International Civil Airports Association (ICAA) changed its name in 1992 into Airports Council International (ACI).

³ In February 2021, the Airline Catering Association (ACA) co-signed a joint opinion for the first time.

In the five-year period from 1990 to 1994, the participants of the joint committee collectively signed 11 joint opinions. The last one, from March 1994, recommended that all ground staff in the sector be subject to all provisions of the 1993 Working Time Directive. In the next period, from 1995 to 2000, only a single joint opinion was generated. During that time, several European works councils were established: for British Airways, KLM and Aer Lingus in 1996, for Air France in 1997, for Lufthansa in 1998 and for Alitalia in 2000.

Article 7 (1) (b) of Decision 98/500/EC stated that, as of January 1999, an ESSDC would replace the joint committee on civil aviation. The new ESSDC was in fact formally established one year later, in 2000. The reason for the delay was restructuring activity among trade unions in the sector, which resulted in the establishment of the ETF at a founding congress on 14–15 June 1999.

Also in 2000, an agreement was reached (on 22 March) on working hours of mobile staff in the civil aviation sector. This European social partner agreement was implemented through Council Directive 2000/79/EC of 27 November 2000. The March 2000 European social partner agreement was signed by two organisations representing pilots and other workers – ETF and ECA – and by three organisations representing employers. These were ERA; AEA, which folded in 2016; and the International Air Carrier Association (IACA), which became AIRE in 2017.

The following 11 years, 2001–2011, resulted in 25 joint opinions signed by different combinations of European organisations. This resulted from the ESSC's 2003 rules of procedures, which established three working groups: one for aircrew, one for ground handling and one for ATM. On the trade union side, ETF signed all texts, while eight of the 25 texts were signed by ECA. In 2009, a trade union-only cooperation agreement was adopted by ETF and ATCEUC. Following this, ATCEUC joined the ESSDC and co-signed two joint opinions in 2010 and one in 2011. Three new European employer organisations also joined the ESSDC in this period. CANSO, which is the European employer organisation for ATM activities, joined the ESSDC in 2001, and also co-signed 19 of the 25 joint opinions from 2001 to 2011, at least one every year. ACI Europe, representing European airports, also joined the ESSDC in 2001, and co-signed eight joint opinions – one or two every two years – in the period from 2001 to 2011. The Independent Aviation Handlers Association (IAHA) joined the ESSDC in 2003, co-signing the rules of procedure from that year, one joint opinion in 2009 and one joint opinion in 2011. IAHA focused on European airport and ground handling issues. In 2011, IAHA became ASA.

The European Low Fares Airline Association (ELFAA), established in 2004, organised a number of low-cost carriers (LCCs). The 2010 representativeness study for the civil aviation sector reported that ELFAA had member companies in nine Member States but had no capacity to negotiate on behalf of its members (Eurofound, 2010, Table 9). ELFAA never participated in the ESSDC. It ceased operations in 2016, although some of its members are currently represented by A4D.

In the five-year period from 2012 to 2016, six joint opinions were issued, of which five related to ATM. These five joint opinions were signed by the trade union associations ETF and ATCEUC and by the employer organisation CANSO. The sixth text from that period related to atypical employment among aircrew and was signed in February 2015 by ETF and ECA on behalf of the trade unions, and by AEA on behalf of employers. This was the last joint opinion signed by AEA, as it ceased operations in 2016.

The latest five-year period, from 2017 to 2021, is one of newly intensified European social dialogue in the civil aviation sector, with 12 joint opinions reached. Since 2019, two new European employer associations representing airline companies (replacing AEA) have joined the ESSDC and became co-signatories of joint opinions. These are the Airline Coordination Platform (ACP, now ENAA) and Airlines 4 Dialogue (A4D). In 2022, ACP changed its name in European Network Airlines' Association (ENAA).

0.3. Definitions and methodology

The methodology applied is linked to the criteria identified in European Commission Decision 98/500/EC (European Commission, 1998): sector-relatedness, membership and organisational capacity. Each of these criteria will be defined successively in this section, starting with sector-relatedness – that is, the demarcation of the civil aviation sector in agreement with the social partners and the European Commission.

0.3.1. Sector-relatedness

In this study, the following Nomenclature of Economic Activities (NACE) codes are used to refer to the civil aviation sector: 51.10, 51.21 and 52.23 (Table 3).⁴

Table 3: Demarcation of the civil aviation sector based on NACE codes

NACE code	Corresponding economic activity
51.10	Passenger air transport, including: <ul style="list-style-type: none"> • transport of passengers by air over regular routes and on regular schedules • charter flights for passengers • scenic and sightseeing flights • renting of air transport equipment with operator for the purpose of passenger transportation • general aviation activities, such as transport of passengers by aero clubs for instruction or pleasure
51.21	Freight air transport, including: <ul style="list-style-type: none"> • transport of freight by air over regular routes and on regular schedules • non-scheduled transport of freight by air • renting of air transport equipment with operator for the purpose of freight transportation
52.23	Service activities incidental to air transportation, including: <ul style="list-style-type: none"> • operation of terminal facilities such as airway terminals etc. • airport and air traffic control activities • ground service activities on airfields etc. • firefighting and fire prevention services at airports

Source: NACE (Rev. 2)

Table 4 shows patterns of membership representation. Trade union and employer organisations can represent all demarcations of the sector (i.e. covering all activities in NACE codes 51.10, 51.21 and 52.23); this type of sector-relatedness is called ‘congruence’. If an organisation’s membership goes beyond the civil aviation sector as described here, it is categorised as ‘overlapping’. ‘Sectional’ is a type of sector-relatedness whereby an organisation covers a part of the sector and nothing else, whereas organisations that fall into the category of ‘sectional overlap’ cover part of the sector but also have members in other sectors.

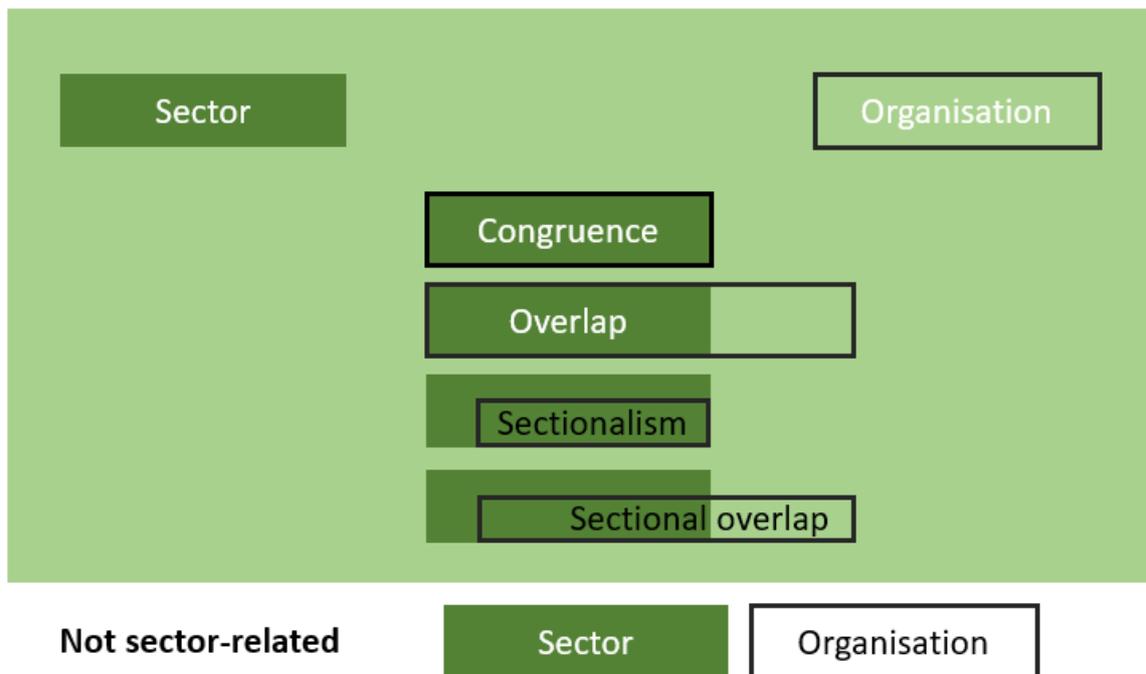
⁴ It is important to note that the distinction between business activities according to NACE (Rev. 2) is not always clear in practice. For instance, in several countries, freight/air cargo is partially or even entirely carried on passenger aircraft. Moreover, the boundaries between the civil aviation sector, as defined in term of NACE codes, and contiguous sectors are often blurred. In particular, in the area of ground service activities the correct demarcation of activities with regard to catering, security, fuelling, ITC services etc. may be difficult, all the more so since many such services have been outsourced and organisationally fragmented. For instance, in Germany, in the field of airport fire services a tendency to cooperating with the public local fire services or outsourcing part of the operations to them can be observed.

Table 4: Representation patterns of organisations

Domain pattern	Domain of organisation within the sector	Domain of organisation outside the sector
	Does the domain of the trade union/employer organisation cover potentially all employees/companies in the sector?	Does the trade union/employer organisation also potentially represent employees/companies outside the sector?
Congruence	Yes	No
Overlap		Yes
Sectionalism	No	No
Sectional overlap		Yes

Figure 1 presents the four types of sector-relatedness.

Figure 1: Four types of sector-relatedness



0.3.2. Membership

Membership constitutes another important aspect of representativeness. Two levels of membership are looked at here: first, the geographical coverage of EU-level organisations (the Member States where the EU-level trade union/employer organisation has affiliates), and, second, the membership strength concentration of the national affiliates. An important aspect to be assessed is whether EU-level players organise most of the national-level players, or at least the most significant ones (in relation to their number of members in the sector and their involvement in collective bargaining, as well as the level of representation).

Membership of a social partner organisation requires payment of membership fees. However, some organisations are reluctant to inform third parties about such payments. Taking into account limits of

transparency, this study does not always distinguish between different membership statuses. Where possible, indirect membership is taken into account.

0.3.3. Organisational capacity

The organisational capacity of the European social partners is analysed in terms of their ability to commit themselves on behalf of their members and to conclude binding agreements or actions that can be implemented or monitored EU-wide through the support of their affiliates. To assess their capacity to negotiate, the **actors** and their objectives and decision-making structures provided in their statutes are considered as well as the **outcome** in terms of joint opinions. The **processes** through which the organisations obtained mandates, support and approval from their member organisations in the negotiation process are also considered.

The involvement of social partners' members in **national-level collective bargaining** is also key, as it shows that they are able to obtain a mandate to negotiate on behalf of their members (at least at national level, which could then also translate to a mandate to negotiate at EU level). Such a mandate, whether implicit or explicit, allows negotiations to take place at European level, which could potentially result in binding agreements or the drafting of European autonomous agreements (requiring implementation by social partners at national level in line with their respective practices and traditions). The capacity to act autonomously in this way is an important contribution to the effectiveness of the ESSDC.

Involvement of national sector-related trade unions and employer organisations in collective bargaining is also a factor that distinguishes them from professional associations and business associations, which only defend their members' interests through unilateral lobbying activities and do not involve themselves in negotiations on working conditions through collective or social dialogue. Trade unions and employer organisations that do engage in collective bargaining on behalf of their members have a proven capacity to obtain a mandate from their members to negotiate and to make compromises and agreements with organisations representing different interests. In its analysis, this report aims to distinguish between these different types of organisations.

Finally, representativeness also depends upon the organisations' structures and resources and their capacity to mobilise the active participation of their members and aggregate the different interests of member organisations, as well as their potential to act autonomously at European level. **Effective participation in the ESSDC meetings** is assessed in terms of presence at the meetings in the two years before the year of publication of this report.

0.4. Data collection and quality control measures

Representativeness studies combine top-down and bottom-up approaches. The top-down approach aims to identify all sector-related affiliates of the European associations listed in Table 2. These are the European social partner organisations currently involved in the ESSDC for the civil aviation sector.

The bottom-up approach targets other organisations involved in collective bargaining related to the civil aviation sector and seeks to identify their membership of other European-level organisations.

Unless otherwise cited, this study draws on the country reports provided by the Network of Eurofound Correspondents. Where precise quantitative data could not be obtained, estimates are provided rather than leaving a question unanswered.

Most quantitative data stem from three sources:

- official statistics and representative surveys
- administrative data, such as membership figures provided by the organisations (e.g. to calculate the density rates)
- estimates, expert opinions and assessments made by the Network of Eurofound Correspondents or representatives of the organisations

Other sources include data and reports published by the European organisations listed above and their members, the social dialogue texts database, data from Eurostat (Structural Business Statistics and the EU Labour Force Survey), and sector studies commissioned by the European Commission and other organisations. A complete list of references can be found at the end of the report.

To ensure the quality of the information gathered, several verification procedures and feedback loops were included in the process of drawing up this study. A preparation meeting was held on 29 March 2019 with all EU social partner organisations from the civil aviation sector, at the premises of the European Commission.

First, combining the top-down with the bottom-up approach, information on the affiliates of the relevant EU-level social partners and other sector-related associations was collected from the national reports prepared by the Network of Eurofound Correspondents between September and December 2019. Subsequently, Eurofound research managers and the authors of this report checked the consistency of the national contributions and asked the national correspondents to revise these in March–April 2020. Moreover, in the light of the severe impact the COVID-19 pandemic has had on the civil aviation sector, an additional brief questionnaire was sent to the Network of Eurofound Correspondents in October 2020 in order to gain updated information for each Member State on key figures and developments in the sector at the end of 2020, since the outbreak of the pandemic.

After the first draft of the overview report for this study was compiled in the first half of 2021, it was decided to do some extra work in the second half of 2021 to obtain further information, in particular on the role of multinational companies in the industrial relations landscape in the sector. In November 2021, consultations took place with European social partner organisations on the specific sections of the report in which they are mentioned. Following their feedback, these sections were updated and completed in December 2021.

Parts of the report were shared in January 2022 with the European trade union organisations ETF, ECA and ATCEUC, and with the European employer organisations ENAA, AIRE, ERA, A4D, ACI Europe, ASA and CANSO, as well as with the European Commission. The European Cabin Crew Association (EurECCA) (organising trade unions) and Airline Catering Association (ACA) (organising employers) also received the draft report in the beginning of 2022. As European and national organisations were able to view the information reported by other organisations in the same country and, if necessary, comment on the credibility or accuracy of the information from other organisations representing a similar membership, this process involved an element of mutual control and recognition.

The final report, considering all comments provided, was formally evaluated and approved in June–July 2022. This involved a written procedure by the Eurofound Advisory Committee on Industrial Relations – which consists of representatives from industry, governments and the European Commission – in the presence of the European-level sectoral social partners identified in the report. To allow for discussion among the social partners, an online meeting was organised during the written evaluation procedure. Delegates from the sector’s European social partner organisations and the members of the Eurofound Advisory Committee on Industrial Relations were invited to this meeting. After the formal evaluation, the report was edited and prepared for publication in the second half of 2022.

0.5. Structure of the report

The report consists of three main sections, beginning with a summary of the economic background and employment specificities of the civil aviation sector. The report then analyses the relevant social partner organisations in the 27 EU Member States. The third section considers the representative associations at European level.

Finally, it is important to note the difference between the research and political aspects of this study. While providing data on the representativeness of the organisations under consideration, the report does not conclude whether the representativeness of the European social partner organisations and their national affiliates is sufficient for participation in the European social dialogue. The information and analyses provided in this report are to provide the evidence base for further efforts and decisions by the social partners themselves and the European Commission.

1. Economic background and employment specificities of the sector

This chapter describes the economic background of the civil aviation sector in terms of employment and company structure. It aims to outline the scope of the workforce and companies in the sector that are represented by trade unions and employer organisations referred to in the following chapter.

In a first section, the report presents the numbers of employees per country. The proportion of the workforce for each type of activity compared with the total European civil aviation workforce is given, as well as upward or downward trends in numbers. In a second section, the focus will be on working conditions and the characteristics of collective interest representation. Figures related to how companies in the sector evolve over time are detailed in section 1.3.

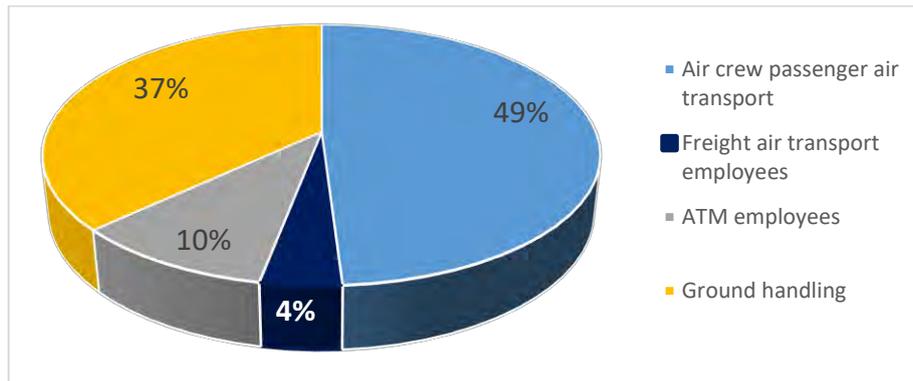
Trends and tendencies in civil aviation cannot be understood independently from the economic context of the sector and insight into the catalysts that trigger or drive certain developments (Jorens et al, 2015). Therefore, this specific economic context in the sector will be presented in section 1.4. How the ESSDC fits into this economic context in the EU is presented in section 1.5. Finally, there is the impact of the COVID-19 pandemic on the civil aviation sector. This will be evaluated in section 1.6, first for the aircrew employees and their employers, then for those in ground handling activities, and finally for the ATM employees and their employers.

1.1. European civil aviation sector workforce

The civil aviation sector in the EU27 employs some 558,000 people, which corresponds to 0.3% of the total EU workforce. Of this workforce, about half are active as aircrew in passenger transport, 4% work in freight air transport, about 10% work in ATM and 37% in ground handling activities (Figure 2). Among the aircrew employees, two-thirds are cabin crew and one-third are pilots. A similar breakdown is found among ATM employees, of whom one-third are ATCOs and two-thirds are air traffic safety electronics personnel (ATSEP) and other ATM employees (Figure 3).⁵ For employees in ground handling activities, only partial information is available in 10 of the Member States, which does not allow accurate calculations of average proportions for the entire European ground handling workforce. Proportions vary from country to country, and there is no precise breakdown available for the ground handling workforce in too many Member States. The variation in the middle of Figure 3 indicates the range of proportions recorded in the different Member States for which data were available, thus giving a rough estimate of the proportion of each group within the overall aviation ground services workforce.

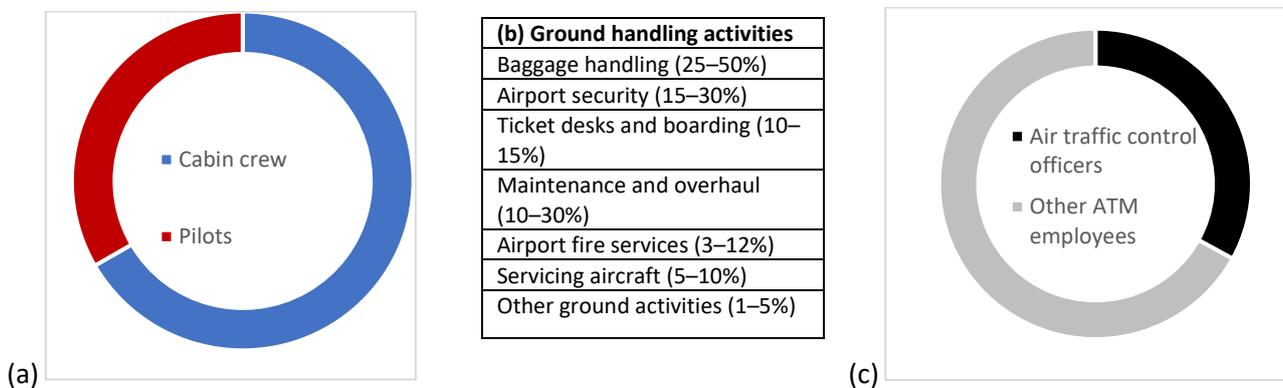
⁵ Other ATM employees are employees working in administration, management, accounting or other non-ATC activities within the air navigation service provider (ANSP).

Figure 2: Breakdown of the entire civil aviation sector workforce



Source: Network of Eurofound Correspondents, 2019–2020

Figure 3: Breakdown of (a) aircrew workforce, (b) ground handling workforce and (c) ATM workforce



Source: (a) Network of Eurofound Correspondents, 2019–2020; (b) Network of Eurofound Correspondents, 2019-2020 (partial info); (c) Ecorys, 2007

Table 5 shows the number of employees in the civil aviation sector per country as well as the percentage of sector employees as a share of the entire national workforce and as a share of the EU aviation sector workforce.

Table 5: Employees in the civil aviation sector, 2018

Member State	Employees in NACE 51.10 (passenger)	Employees in NACE 51.21 (freight)	Employees in NACE 52.23 (services)	Employees in the whole civil aviation sector (NACE 51.10 + 51.21 + 52.23)	Share of total national employment (%)	Share of the total EU27 sector workforce (%)
DE	58,387	5,855	68,668	132,910	0.36	23.67
FR	64,077	0	24,402	88,479	0.37	15.76
ES	31,531	977	34,326	66,834	0.41	11.90
IT	19,615	580	28,338	48,533	2.75	8.64
NL	28,500		7,084	35,584	0.49	6.34
PT	11,105	75	7,878	19,058	0.48	3.39
AT	8,771	85	8,130	16,986	0.45	3.02
PL	3,762	431	11,736	15,929	0.12	2.84
DK	7,039	1,057	7,699	15,795	0.62	2.81
SE	6,328	266	7,576	14,170	0.32	2.52
IE	7,260	171	5,931	13,362	0.70	2.38
CZ		6,800	5,918	12,718	0.29	2.26

BE	4,350	1,273	5,508	11,131	0.27	1.98
FI	6,023	44	4,734	10,801	0.50	1.92
RO	4,329	286	5,811	10,426	0.16	1.86
EL	3,703	240	6,472	10,415	0.41	1.85
BG	1,863	376	5,801	8,040	0.30	1.43
LU	3,320	1,600	330	5,250	2.00	0.93
HU	1,232	138	3,649	5,019	0.13	0.89
LV	1,887	195	2,173	4,255	0.55	0.76
HR	1,089	0	2,946	4,035	0.28	0.72
CY	444	0	2,161	2,605	0.75	0.46
MT	1,518	7	987	2,512	1.21	0.45
LT	515	42	1,706	2,263	0.19	0.40
SK	541	45	1,541	2,127	0.10	0.38
EE	500	0	865	1,365	0.26	0.27
SI	0	0	817	817	0.10	0.15
EU27	284,489	13,743	263,187	561,419		
% of EU27	59	3	47	100	0.34	100.00

Notes: Ordered by number of people employed in the civil aviation sector. Data for Czechia, Estonia, Luxembourg, Malta and the Netherlands are only partially or not at all available. According to Eurofound's national correspondent in Slovenia, activities in NACE codes 51.10 and 51.21 ceased a few years ago. NACE 51.10 employee data refer to 2011 in Denmark, 2012 in France, 2013 in Ireland, 2014 in Lithuania, 2015 in Portugal and 2017 in Poland. NACE 51.21 employee data refer to 2011 in Denmark, 2013 in Ireland and Sweden, 2014 in Lithuania, 2015 in Portugal and 2017 in Poland. For Czechia and the Netherlands, data from the Labour Force Survey have been used for number of employees in NACE 51, as data from Structural Business Statistics were not available. Given that in the Labour Force Survey data are available at two-digit level, data for Czechia and the Netherlands include NACE 51.10 (passenger air transport), NACE 51.21 (freight air transport), NACE 51.12 (freight air transport and space transport) and NACE 51.22 (space transport). For Estonia, Luxembourg and Malta, data were estimated based on information from 2018 provided by the Network of Eurofound Correspondents. Data for Czechia, Estonia, Luxembourg, Malta and the Netherlands might thus be slightly overestimated.

Cells marked green indicate a proportion of employment in the civil aviation sector equal or higher than 0.50% of the entire national workforce (the EU average is 0.34%). These are the countries for which the civil aviation sector is most important in terms of employment.

Source: Eurostat, Structural Business Statistics

In absolute numbers, the sector is largest in Germany (132,910), France (at least 88,479), Spain (66,834) and Italy (48,533). Together, these four countries represented about 60% of the EU27's total civil aviation workforce in 2017–2018. Of the entire European civil aviation workforce, 24% are employed in Germany, 16% in France, 12% in Spain and 9% in Italy (see the right-hand column of Table 5).⁶

As a share of total employment, the civil aviation sector is largest in Italy (2.75%), Luxemburg (2%) and Malta (1.21%). In Denmark, Ireland, Finland, Latvia and Cyprus, there is between 0.5% and 1% of the national workforce, employed in the civil aviation sector. , These percentages are indicated in cells marked green in Table 5.

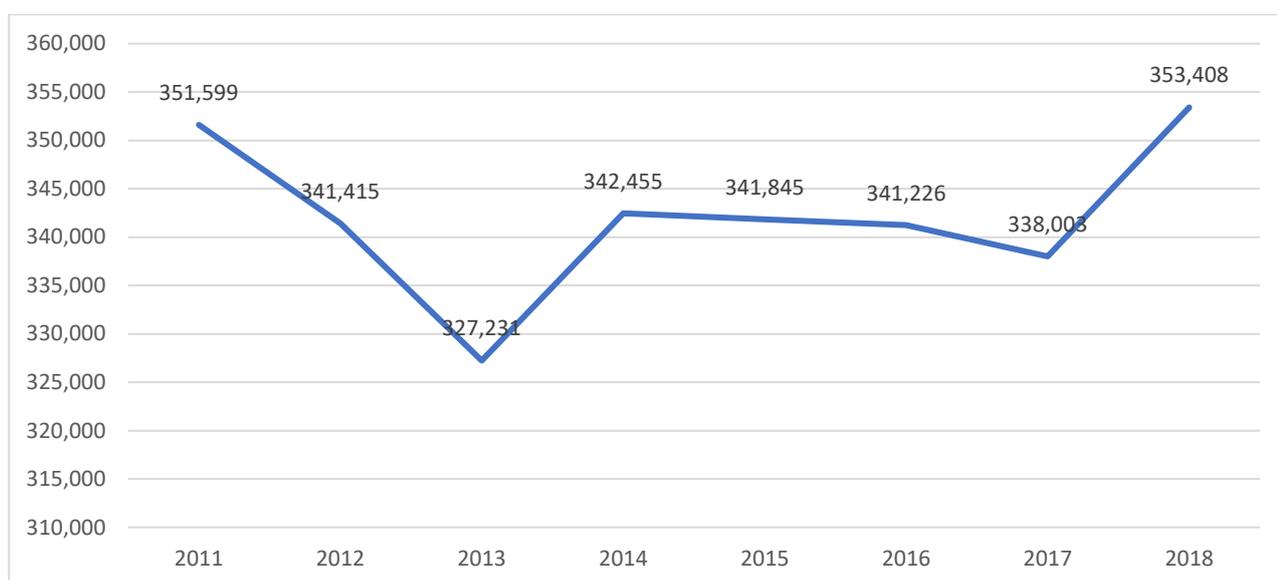
In terms of employment volume, freight air transport (NACE 51.21) carries little weight throughout the EU27 (with the exception of Germany, with 5,855 employees in this subsector). The other two subsectors –

⁶ Developments in the aviation sector in 2020–2021 may have changed these proportions, but the numbers and percentages here refer to the situation in the period before the COVID-19 crisis impacted on the sector.

passenger air transport (NACE 51.10) and service activities incidental to air transportation (NACE 52.23) – are largely equal in size, with passenger air transport slightly outweighing the ground service activities. However, a look at individual countries reveals a high level of variation in the proportions of the two subsectors. While overall in the EU27 aircrews numerically outweigh ground staff, there are several countries where a higher proportion of sector-related workers is engaged in ground handling and airport-related activities than in air transport activities. For example, in Belgium, Bulgaria, Croatia, Denmark, Germany, Greece, Hungary, Italy, Latvia, Lithuania, Poland, Romania, Slovakia, Slovenia, Spain and Sweden, activities falling within the purview of NACE 52.23 are more significant in the sector in terms of employment.

Employment in passenger air transport has remained relatively stable if one looks only at 2011 and 2018. In between, however, there was a temporary slump around 2013, as shown in Figure 4. By contrast, the number of employees in ground handling activities in NACE 52.23 steadily increased from 2012 to 2018, by some 65,000 workers (26%) (see Figure 5).

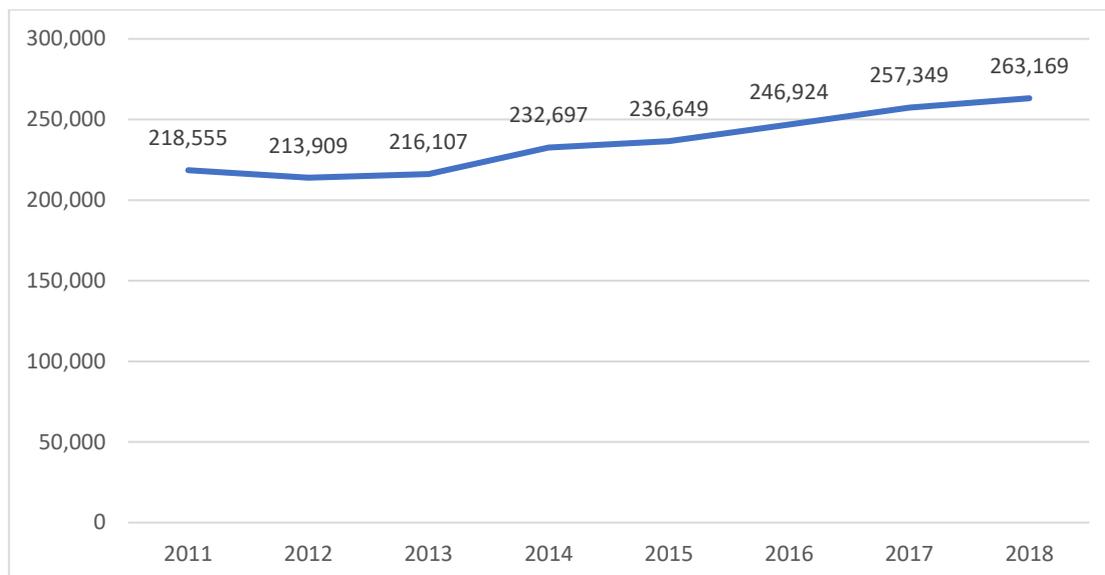
Figure 4: Number of employees in the passenger air transport sector (NACE 51.10) in the EU28, 2011–2018



Note: As the EU27 data are only available for 2017 and 2018, we have opted to keep info on the EU28 in this table to allow for comparability over time. If there were EU28 data for 2011–2016 and EU27 data for 2017–2018, the data would not be comparable.

Source: Eurostat, Structural Business Statistics

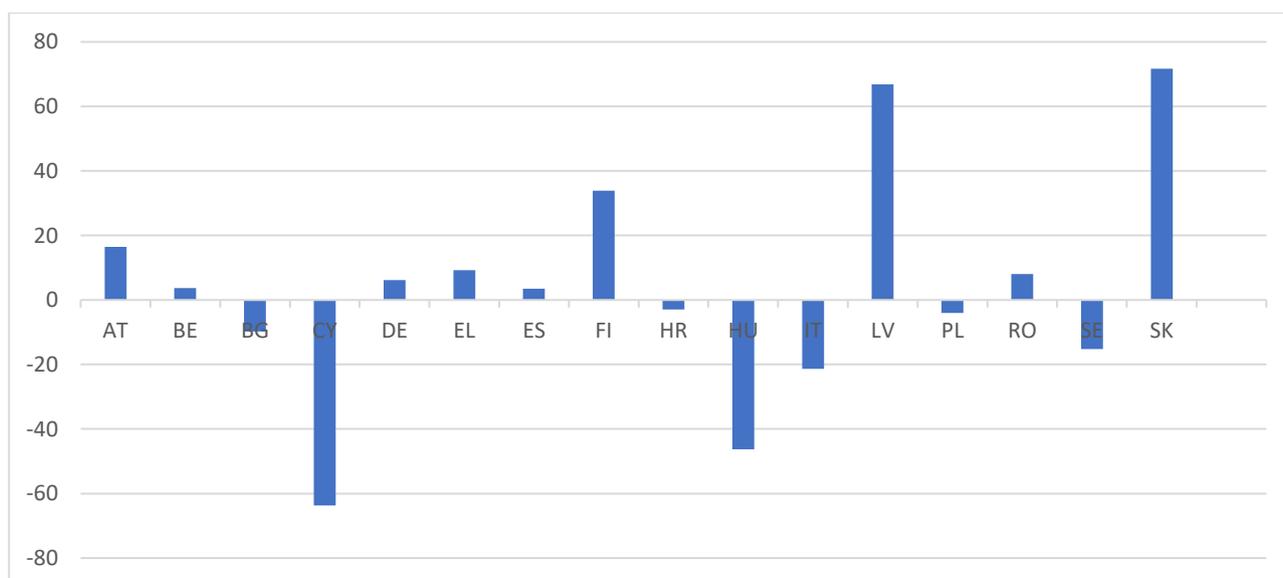
Figure 5: Number of employees in service activities incidental to the air transportation sector (NACE 52.23) in the EU27, 2011–2018



Source: Eurostat, Structural Business Statistics

Figure 6 shows the relative changes in employment in the air passenger transport subsector from 2011 to 2018, disaggregated by country. In relative terms, the increase was highest in Slovakia and Latvia. As the sector is very small in these countries, a fairly small increase in absolute figures generates a very high relative change. By contrast, in Cyprus and Hungary, the number of air transport sector employees shrank by about 64% and 46%, respectively, during this period. In the case of Cyprus, this can be ascribed to the closure of the state-owned national carrier Cyprus Airways in 2015 due to bankruptcy. In Hungary, the reason for the sharp decline in employment probably relates to the bankruptcy of its flag carrier, Malev, in 2012.

Figure 6: Relative change (%) in the number of employees in the passenger air transport sector (NACE 51.10), 2011–2018

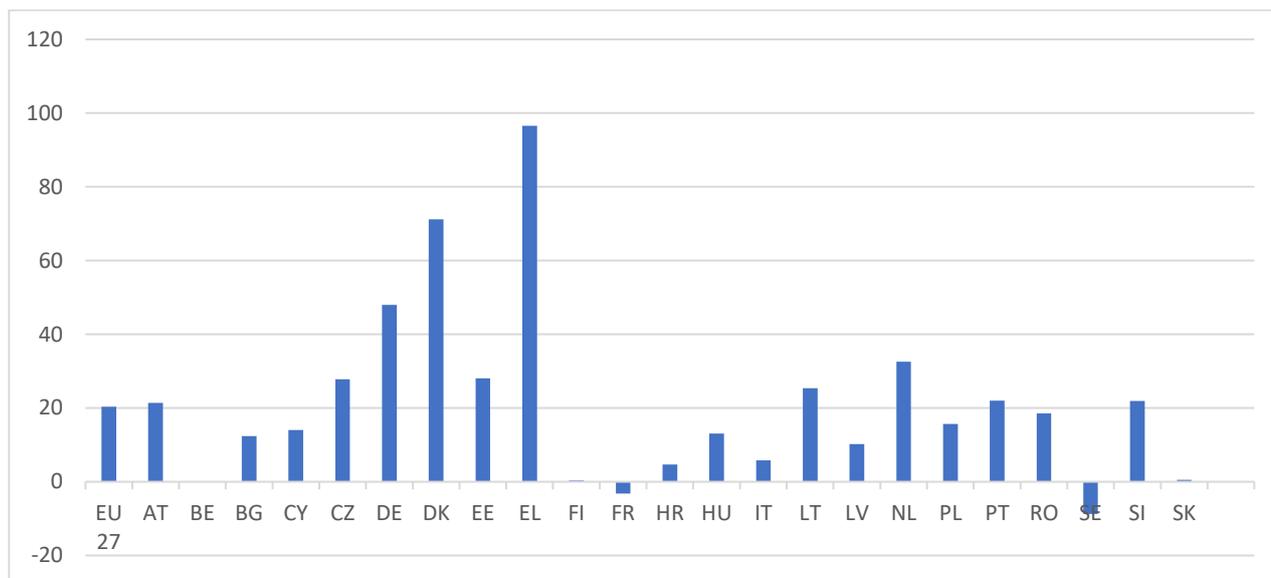


Note: Data are from 2012 for Sweden, 2014 for Belgium and Finland, and 2015 for Croatia instead of 2011. Data are from 2017 for Poland rather than 2018. There are no (comparable) data for Czechia, Denmark, Estonia, France, Ireland, Lithuania, Luxembourg, Malta, the Netherlands and Portugal. In Slovenia, sectoral activities ceased to exist in 2011.

Source: Eurostat, Structural Business Statistics

Figure 7 indicates that, from 2011 to 2018, employment in civil aviation ground-based activities increased to a greater or lesser extent in almost all Member States for which data is available. The relative growth in the number of employees in this subsector was highest in Greece (at almost 100%), Denmark (more than 70%) and Germany (almost 50%). This reflects the dynamic development of the civil aviation industry in these countries during the past decade.

Figure 7: Relative change (%) in the number of employees in service activities incidental to air transportation (NACE 52.23), 2011–2018



Note: For Czechia, data are from 2015, rather than from 2011. There are no (comparable) data for Luxembourg, Malta and Spain.

Source: Eurostat, Structural Business Statistics

In passenger air transport, the proportion of male employees was about 60% in 2013, and thus slightly higher than in the overall economy. There are still few women pilots (around 5% in the EU27; ECA, 2018) today, whereas female employees still largely predominate among the cabin crew. The proportion of women among cabin crew varies from 60% to 70%, and the proportion of men between 30% and 40%, with some variation between countries and airlines (Aviation Career Hub, 2020). Across the EU27, the proportion of women in air transport increased slightly during the 2010s (ILO, 2013, p. 22), and this development is likely to have continued. The passenger air transport subsector had a slightly older workforce than the average in the overall economy (European Commission, 2015, p. 18). In the much smaller freight air transport sector, the proportion of male employees stood at about 77% in 2013 and thus was significantly higher than in passenger air transport. This does not come as a surprise, however, since passenger air transport activities involve a large number of cabin crew staff, while freight air transport essentially deals with manual labour, traditionally undertaken by male rather than female workers (European Commission, 2015, p. 18). Similarly, the airport operation and handling activities subsector is characterised by a significant proportion of manual work and thus a relatively high proportion of male workers. Employees in ground services are about 60% men and 40% women.

All three areas of civil aviation-related activities (passenger air transport, freight air transport, airport operation and handling) record a notable decline in younger employees (younger than 30). This may indicate a reduction in employment opportunities in the civil aviation industry for younger workers. It has been argued

that this age group is most affected by deteriorations of employment and working conditions, since younger employees entering the workforce are often employed under revised employment and working conditions or by new subsidiaries paying poorer wages and offering worse employment provisions those of older staff (European Commission, 2015, p. 18).

1.2. Working conditions and workers' interest representation

In this section, working conditions will be considered, first for the aircrew (pilots and cabin crew), then for ground handling employees, and finally for ATM employees.

Eurofound national correspondents from 18 EU Member States (including the countries with the largest sectoral workforces) reported that standard open-ended employment contracts are predominant for pilots and cabin crew. Exceptions are found in Poland and Hungary, where 60% and 50%, respectively, have atypical work contracts; this is more common among LCCs. Employees of national airlines are more likely to have permanent open-ended contracts. This is confirmed by a 2015 study commissioned by the ESSDC, which identified the following atypical forms of employment in the sector: self-employment, fixed-term work, temporary agency work, zero-hours contracts and pay-to-fly schemes (Jorens et al, 2015).

In a survey of pilots, 79% of the 6,633 respondents reported having a direct employment contract. Among the pilots who reported being self-employed, 70% said that they fly for an LCC (Jorens et al. 2015, p. XIII). Considering that standard forms of employment remain predominant, the growth in atypical employment of aircrew through temporary agency work, pay-to-fly schemes or self-employment will be explained here.

With regard to employment contracts, an empirical study conducted by Ricardo Energy & Environment and commissioned by the European Commission (2019) found that temporary agency work is relatively widespread among aircrew. In some cases, aircrew are employed by subsidiaries of air carriers (human resources agencies, for instance) or other intermediaries that have the same role as temporary work agencies (European Commission, 2019, p. vi). The study reveals that between 9% and 19% of cabin crew and some 8% of pilots in the EU28 are employed through some form of intermediary staff agency, whether in the form of bona fide temporary agency work or under similar arrangements. Such employment practices are more prevalent among LCCs and more common among younger aircrew. In some cases, other companies are used as intermediaries to avoid direct employment contracts with air carriers, which usually provide more favourable employment and working conditions than those intermediary companies. In these cases, aircrew do not really know their actual employer, although it is clear which air carrier they work for (Jorens et al, 2015). From the reports of the Network of Eurofound Correspondents it becomes evident that temporary agency work is used on a larger scale to employ cabin crew in Austria, Estonia, the Netherlands and Sweden. This practice leads to a difference between the direct employees and the total numbers of employed persons (which includes the direct employees, temporary agency workers and self-employed), and in collective bargaining, which in some cases may only apply to the direct employees. Temporary agency work is also used among ground handling staff, although less frequently than among aircrew. To a slight extent, such arrangements can be found among ground handling staff in countries including Austria, Croatia, Czechia, Denmark, Germany, Hungary, Luxembourg, the Netherlands, Poland and Sweden. During the summer season, however, the share of ground handling agency staff may significantly increase, which is the case in the Netherlands, for instance. In Spain, almost half of the total ground handling personnel are engaged on a temporary basis throughout the year. This temporary increase of employment in ground handling activities emphasises the importance of temporary agency work in the sector.

Another civil aviation-specific employment practice concerns pay-to-fly schemes. This means that a pilot, in the context of their line training to gain the requisite flight experience, operates an aircraft as a first or second officer on a commercial service and pays the airline for the training. The line training is the prerequisite for

licensed pilots to operate as captains on commercial aircraft. The Ricardo study reveals that up to 6% of EU28 pilots are involved in such schemes, and this practice seems to be more widespread among charter carriers and LCCs (European Commission, 2019, p. vii). It remains unclear in which countries such line training practices exist; in France pay-to-fly schemes are considered illegal, as they are perceived as constituting unlawfully non-remunerated and undeclared work.

Self-employment among aircrew appears to be one of the most frequent atypical employment arrangements in the civil aviation sector. The Ricardo study reveals that nearly 9% of EU28 pilots identify themselves as self-employed, with high variations according to country and type of air carrier/business model. The vast majority (88%) of formally self-employed pilots are contracted through a temporary work agency or other type of intermediary company, and 75% of self-employed pilots work for LCCs. Engaging pilots on the basis of self-employment seems to be most common at Ryanair; traditional air carriers make only limited or no use of such arrangements (with the notable exception of the Polish air carrier LOT).

Not only organised labour but also pertinent research in this field suggests that most of these pilots cannot be classified as genuinely self-employed, as they lack the freedom to work for more than one air carrier in parallel, and the ability to decide when and how many hours they work. Rather, they are subordinate to instructions from the air carrier and have an exclusive relationship with that carrier analogous to that of a direct employee (European Commission, 2019, p. ix). From sectoral information collected by the Network of Eurofound Correspondents, it appears that some pilot trade unions regard the use of self-employment for pilots as bogus self-employment for the purpose of avoiding tax and social security obligations applicable to standard employment relationships.

Self-employment among pilots has been reported in Austria (Wizz Air), Belgium (Ryanair), Cyprus, Czechia, Hungary (Wizz Air) and Ireland (Ryanair). In Latvia, all pilots of Air Baltic were forced to become shareholders of a subsidiary of the carrier in 2020 in order to capitalise the company. Substantial self-employment among cabin crew has been reported from only a few countries, including Hungary, Ireland and Poland (where up to 60% of total cabin crew are formally self-employed). Ground handling staff appear to rarely work on the basis of self-employment; only in Hungary and Ireland (Ryanair baggage handlers) are a significant number of workers formally self-employed.

Short-term employment contracts exist in the civil aviation sector as well; overall, however, they do not seem to be a significant issue. According to a Steer Davies Gleave study, the proportion of short-term contracts in both air transport and airport operation and handling in the EU28 was consistently lower than in the overall economy in 2013 (European Commission, 2015, p. 18). The share of part-time workers in air transport in the EU28 stood at 18% in 2013; among women, however, it was 34%, while fewer than 10% of men were employed part time (European Commission, 2015, pp. 18–19).

On average, labour costs were 32% higher in air transport than in airport operation and handling in 2013 (European Commission, 2015, p. 19). This reflects the higher skills required on average for air transport activities, and associated higher wages. Moreover, aircrew, in particular pilots, are usually unionised, which facilitates collective bargaining in general and favourable pay settlements in particular. However, employee representation may be a challenge for aircrews in some countries and with some airlines, especially among LCCs. In some countries, for instance, LCCs are increasingly offering newly qualified aircrew only contract work, which may require them to set themselves up as a limited company and contract their services to a client airline or be employed through an agency. Some of these contracts offer pay only for flight hours and do not provide associated benefits, sick pay, pay on leave or pay during quieter times. In Finland, the increasing use of zero-hours contracts for both pilots and cabin crew has also been observed. Moreover, it is difficult for some cabin crew to unionise in several countries due to the mobile nature of the work, pressure from the airline not to organise and a lack of national language skills.

With regard to the employment and working conditions of airport operation and ground handling workers, a series of issues has been reported from virtually all countries. Irrespective of the concrete form of employment, ground staff are commonly confronted with shift and night work (check-in staff), irregular hours, high workloads and physically demanding manual labour (baggage handlers).

Trade union presence among ground handling and airport terminal staff tends to be less pronounced than among pilots and cabin crew. This is because the number of companies employing baggage-handling staff and the many different geographical locations involved lead to fragmentation, which makes it difficult for unions to reach workers. Moreover, irregular schedules, shift work and time pressures in combination with a lack of national language skills (in the case of migrant workers) make it difficult for unions to recruit/represent ground staff, as has been reported by Eurofound national correspondents from Austria, Croatia, Czechia, Hungary, Ireland, Italy and Poland.

ATM workers constitute another category of employees among whom standard forms of employment are highly prevalent. This is because ATM systems were traditionally owned and managed by government administrations, such that public-law employment relationships or, after privatisation/liberalisation (International Transport Forum, 2015), standard private-law employment relationships are the norm. Today, ATM systems vary from fully state owned to fully privatised and from profit to not-for-profit entities (ILO, 2013, p. 17). According to the Network of Eurofound Correspondents, civil servants in the ATM subsector can still be found in Cyprus, Denmark, France, Greece, Hungary, the Netherlands, Portugal and Sweden. In Denmark, Greece, the Netherlands and Sweden, all or the vast majority of ATM workers (at least the ATCOs) have public-law status.

Although ATM workers, in particular ATCOs, often suffer from excessive overtime due to an alleged⁷ labour shortage (the number of employees in this segment has been reduced in some countries despite significant growth in the number of air traffic movements), these employees, as the highest-qualified employee group among non-flying aviation staff, tend to enjoy the highest salaries. Due to the crucial safety task they perform, their highly specialised education and the fact that it takes two years or more to train a new ATCO, they have exceptional labour market and bargaining power vis-à-vis the employer and the state. Therefore, ATM workers in general, and ATCOs in particular, are readily canvassed by trade unions and easily unionised, mainly by occupational trade unions or specific professional associations for ATCOs.

1.3. Companies in the civil aviation sector

During the second half of the 20th century, civil aviation became a major industry for economically highly developed parts of the world. Both global supply chains and international mass tourism would not be conceivable without a dense civil aviation network worldwide, and about 40% of high-tech sales depend on the functionality of air transport. Moreover, perishable goods such as fresh food and cut flowers can only be transported over large distances by air transport (ILO, 2013, p. 2).

Air transport systems are highly complex and interdependent, comprising airline operators, ground-based service providers and authorities. Reflecting the activities of the entire civil aviation industry and the representational scope of the civil aviation EESDC, the purview of this study covers activities, employees and social partner organisations in the following fields.

⁷ Some suspect that the understaffing is deliberate, as the salaries appear very attractive leading to the expectation that there would be no shortage of applicants.

- Air transport of passengers and freight, including major full-service airlines, LCCs, regional airlines, charter airlines, special flight services, air cargo carriers and air freight forwarders as well as mail air transporters. These activities largely correspond to NACE 51.10 and 51.21.
- Ground-based air traffic services and airport activities, including major and regional airports and related activities, such as operation of airport terminal facilities and ground service activities on airfields. These activities involve baggage handling; operation of ticket desks, check-in and boarding services; airport security; aircraft maintenance and overhaul; airport fire services; fuelling; catering and in-flight services; de-icing; towing and pushbacks; cleaning activities; etc.
- ATM, including airport and air traffic control (ATC) activities that involve ATCOs, ATSEP and other ATM staff, such as accountants and administrative staff; all these ground-based air traffic service and ATM activities largely correspond to NACE 52.23.

Given the heterogeneity of the sector in terms of activities and operators/companies (air carriers, airports, service providers, ATM companies etc.), an all-in-one approach to capture the sector's actors is not expedient. Therefore, Table 6 gives an overview of the number of enterprises in Member States disaggregated by NACE code and partially by type of company, as far as Eurostat provides these data. What cannot be reported is the distribution of companies by size, since Eurostat does not calculate company numbers according to size classes in this sector. Nevertheless, the relationship between the numbers of sectoral employees (Table 5) and the numbers of companies provided in Table 6 gives an indication of the average size of sectoral companies (in terms of the average number of people employed per company) in each Member State. Accordingly, the largest companies on average (with an average of around 100 employees or more per company) can be found in Croatia, Cyprus, Germany, Greece, Italy, Portugal and Spain, whereas the smallest companies on average are located in Belgium, Hungary, Ireland, Poland, Slovakia and – perhaps – Slovenia (Eurostat data for Slovenia have to be treated with caution).

Table 6: Companies in the civil aviation sector by NACE code and civil airports, 2018

Member State	Number of companies in passenger air transport (NACE 51.10)	Number of companies in freight air transport (NACE 51.21)	Number of companies in service activities incidental to air transport (NACE 52.23)	Total number of companies in civil aviation sector (NACE 51.10 + 51.21 + 52.23)	Number of civil airports	Number of companies/employers in air traffic control	Average number of people employed per company
EU27	3,661	535	4,844	9,040	430	35	62.1
AT	161	9	63	233	6	1	72.9
BE	220	26	196	442	5	1	25.2
BG	39	17	81	137	4	1	58.7
CY	3	0	14	17	2	1	153.2
CZ	53	n.a.	71	> 124	5	1	n.a.
DE	470	74	642	1,186	40	8	112.1
DK	63	17	82	162	10	1	97.5
EE	14	7	11	32	7	2	n.a.
EL	45	18	42	105	39	n.a.	99.2
ES	119	16	413	548	39	3	122.0
FI	70	4	71	145	21	1	74.5
FR	565	n.a.	238	> 803	62	1	n.a.
HR	12	0	28	40	9	1	100.9
HU	60	16	126	202	5	1	24.8
IE	59	13	436	508	9	1	26.3
IT	164	24	295	483	46	1	100.5
LT	44	1	18	63	4	1	35.9

Member State	Number of companies in passenger air transport (NACE 51.10)	Number of companies in freight air transport (NACE 51.21)	Number of companies in service activities incidental to air transport (NACE 52.23)	Total number of companies in civil aviation sector (NACE 51.10 + 51.21 + 52.23)	Number of civil airports	Number of companies/employers in air traffic control	Average number of people employed per company
LU	13	16	5	34	1	n.a.	n.a.
LV	21	11	44	76	2	1	56.0
MT	16	0	12	28	1	1	n.a.
NL	339	48	426	813	16	1	n.a.
PL	696	74	1,169	1,939	15	1	8.2
PT	87	3	64	154	20	1	123.8
RO	50	30	66	146	15	1	71.4
SE	229	40	141	410	38	1	34.6
SI	110	5	45	160	3	1	5.1
SK	44	25	39	108	6	1	19.7

Notes: *n.a.*, data not available. NACE 51.10 data for the EU27 refer to 2016 rather than to 2018. NACE 51.10 data refer to 2013 in Ireland and 2017 in Malta. NACE 51.21 data refer to 2013 in Ireland and 2012 in Malta. NACE 52.23 data refer to 2010 in Malta. For Slovenia, company data for NACE 51.10 and 51.21 have been deemed unreliable, as, according to the national Eurofound correspondent from Slovenia, business activities ceased in these segments a few years ago. Civil airport data consider all airports with at least 15,000 passenger units per year. Civil airport and air traffic control data form part of NACE code 52.23.

Source: Eurostat, Structural Business Statistics and Aviation Statistics; Network of Eurofound Correspondents

The, on average, relatively small size of the companies in certain countries may be an indicator of the existence of highly specialised companies in particular niches of the air transport sector. This would include, for instance, small providers in the high-end business aviation segment (including helicopter services) that are flexible enough to respond to the special (mobility) needs and wishes of business people, or charter airlines operating only private jets. Such business models within air transport can be found in Austria, Czechia, Denmark, Estonia, Latvia, Portugal, Romania and Spain. Another niche for smaller companies in the air transport subsector is the operation of specialised freight air transportation, which has been reported from Romania, Spain and Sweden. Moreover, progressive outsourcing in airport-related aviation services has led to major fragmentation of business structures. Outsourcing in the civil aviation sector has increased over the past two decades, with specialist functions – such as baggage handling, security, cleaning and some administrative positions – figuring prominently. Some low-cost air carriers have also outsourced pilots and cabin crew for financial and flexibility reasons (European Commission, 2015, p. 22).

Despite the emergence of smaller civil aviation companies over the last several years through both niche services and outsourcing, in most countries large companies employing more than 250 staff still dominate the sector, in particular in the air transport subsector. While information is not available for all Member States, most workers in the air transport subsector are employed in large companies in at least Austria, Croatia, Czechia, Finland, Germany, Italy, Luxembourg, Poland, Portugal, Romania, Spain and Sweden. Large national but internationally active (through subsidiaries and shares in other companies) airlines (including Lufthansa, Air France, British Airways, KLM and low-fare airlines such as Ryanair) still employ the lion's share of the air transport workforce in Europe. As well as large airports, operating companies – such as Fraport, Menzies and Swissport – employ a major part of the ground handling workforce. Other than airports and independent handlers, it is the airlines themselves that (still) provide most of the ground handling and catering services (ILO, 2013, pp. 14-15).

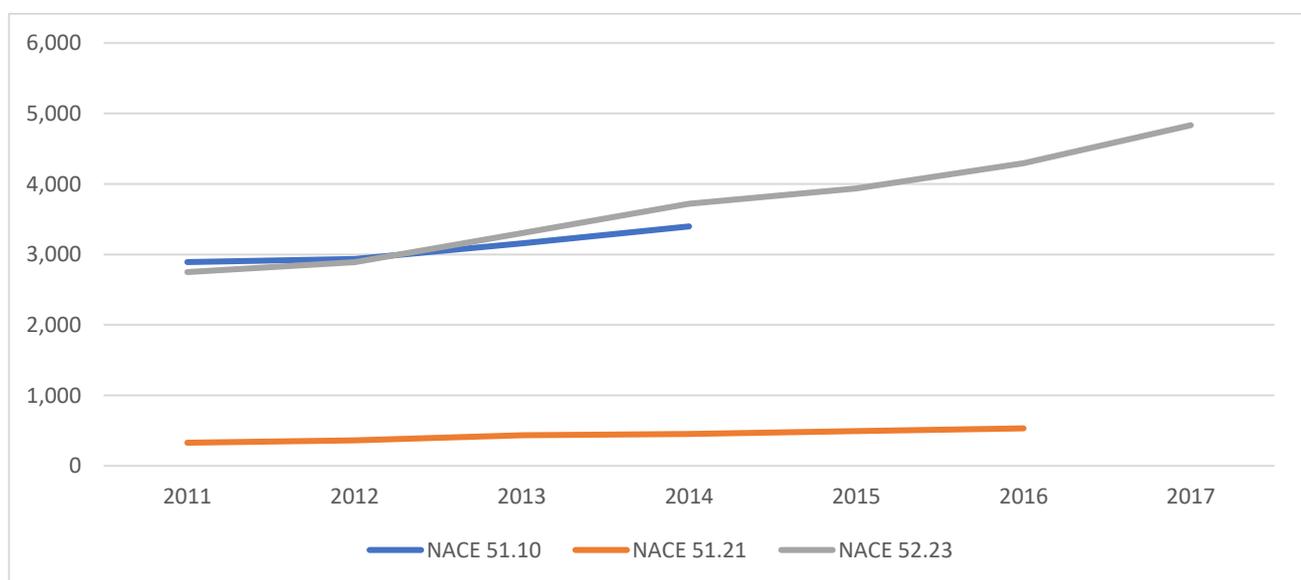
In contrast to air transport and ground handling activities, ATM services are less vulnerable to competition and thus to pressure to bring down costs (although ATM employee representatives deplore tight work

schedules and overburdening due to an alleged labour shortage in some countries). This is because ATM tasks – in particular air traffic control – must be officially guaranteed under state supervision.⁸ In most countries, ATC services are centralised in one organisational unit and either form part of the government administration or have been separated from public administration (in some cases even privatised) and are operated as a private company supervised by the responsible ministry. Only in Estonia, Germany and Spain is there more than one organisation responsible for ATC tasks. In Austria, Finland, Germany (at least the main operational unit, DFS), Ireland, Slovenia and Slovakia, the central ATC unit is a private-law and commercial company/agency owned by the state. In France, the Netherlands, Poland, Portugal, Romania and Sweden, ATC tasks are undertaken by a public corporate entity as a legal person under public law (Portugal) or a unit of the public administration (in most cases an authority under the ministry of transport). By contrast, ENAV of Italy is a privatised company that has been listed on the Milan stock exchange since 2016. More than 50% (53.3%) of its shares are held by the Ministry of Economy and Public Finances. In Cyprus, as in Greece, ATM and ATC services are part of the civil service (Department of Civil Aviation, DCA). Communication, navigation and surveillance are provided by Cyta, a state-owned telecommunications organisation. Meteorology is provided by the Meteorology Department, also a department of the civil service.

As with employment in ground staff-related activities, the growth of the NACE 52.23 subsector is also clear from the increase in the number of companies. Between 2011 and 2017 the number of companies in service activities incidental to air transport increased by 62.3%, reaching an all-time high of 5,715 companies in the EU28 in 2017, as shown in Figure 8. If we compare this with the 26% increase in the subsector workforce (over 2012–2018, see Figure 5), this indicates that growth is happening within smaller enterprises.

Compared with ground staff activities, the development of the company figures in passenger air transport (NACE 51.10) and freight air transport (NACE 51.21) was less dynamic in the 2010s. With regard to passenger air transport, this is largely in line with the generally stagnating employment numbers (see Figure 4).

Figure 8: Number of companies in the civil aviation sector in EU27, 2011–2017



Notes: Reliability of 2015 and 2017 data for NACE 51.10 is low. 2017 data for NACE 51.21 are not available.

Source: Eurostat, Structural Business Statistics

⁸ ANSPs that employ ATCOs are supervised by national supervisory authorities (NSAs). They are responsible for organising proper inspections and surveys to verify service providers' compliance with the single European Sky Service Provision Regulation (Regulation 550/2004) and related . See SKYbrary (undated).

1.4. Economic background of the civil aviation sector

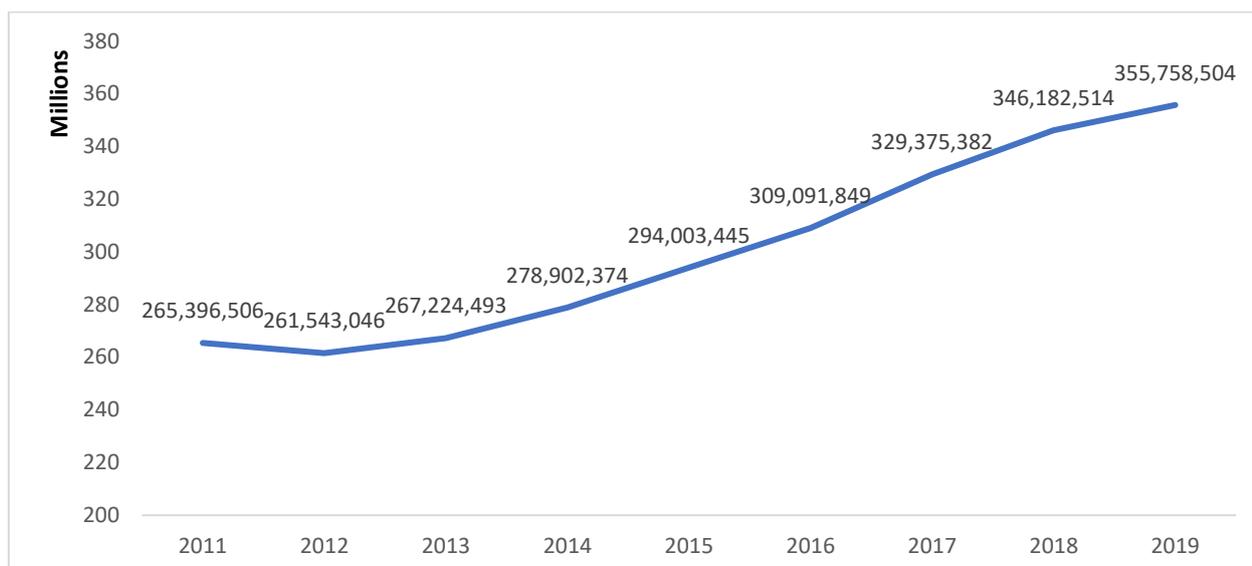
This section briefly outlines the most significant aspects of the civil aviation sector before examining its economic trajectory. Civil aviation is a highly internationalised industry, although airlines are often still firmly anchored to their home countries. Traditional national carriers often still form part of a country's identity. The sector is also highly regulated, at both national and international levels. This obviously has to do with reasons of safety and security but also with economic and political interests. Moreover, the sector has undergone thorough restructuring and deregulation for more than 40 years, which has resulted in a differentiation among various categories of airlines (full-service, low-cost, regional, charter). Ultimately, the job market in the industry has become highly segmented, with a wide variety of job profiles. Since there are many distinct occupational groups in the industry, industrial relations systems within the sector are particularly fragmented (ILO, 2013, p. 3).

Demand for civil aviation services is characterised by constant fluctuation, procyclicality and seasonality. Air traffic operations are highly dependent on economic expansion, population growth, political and social stability, the availability of leisure time, etc. Overall, the industry is extremely sensitive to political and economic fluctuations and very vulnerable to external influences and crises. Therefore, the industry is one of the segments of the economy that have been particularly hard hit by the COVID-19 pandemic and the political measures taken to curb the virus.

Since labour is, apart from fuel, the airlines' largest cost, and airlines have only limited possibilities of influencing fuel prices or aircraft costs, labour remains a key category for managerial action. As a consequence, increasingly tight competition in the sector has resulted in European air carriers reducing direct and indirect labour costs by decreasing the workforce and minimising wages and benefits (ILO, 2013, pp. 21–22). In the European air transport sector, the increased numbers of flight movements and aircraft fleet have counterbalanced the trend of labour efficiency, such that the number of staff has remained largely stable over the past decade. In the field of airport-related activities, such as ground handling, the significant growth in flight movements has been reflected more immediately by rising employment figures. However, the employment terms of the workforce concerned have often changed. Frequently, ground-based activities (such as security and cleaning services) have been outsourced by the airports to providers that offer these services at a cheap rate (since they apply less favourable employment terms to their workforce).

After the economic crisis in the late 2000s (2009 recording the biggest annual fall in flights in Europe for decades), the number of flights in Europe steadily increased from 2014 to 2019. In particular, this trend is due to growth in low-cost flights, and to a lesser extent in flights of traditional airlines. The number of passengers increased even faster during the years leading up to 2019, being 36% higher in the third quarter of 2019 than in the same quarter of 2012 (see Figure 9). In 2019, the number of passengers carried by air in the European Union exceeded 1.1 billion, up from 0.7 billion in 2009 (Statista, 2022a).

Figure 9: Number of air passengers on board in EU28, third quarter of each year, 2011–2019



Note: Number of air passengers on board according to country of registration.

Source: Eurostat, Aviation Statistics

There are three main reasons for this trend: a gradual shift towards flying further in larger aircraft, with the average distance travelled up 16% from 2005 to 2017; an increase in load factors (percentage of occupied seats) from around 70% in 2005 to around 80% in 2017; and the use of slimmer seats so that more passengers can be accommodated on the same aircraft (EASA, 2020). Disaggregated by country, the annual growth in air passengers from 2018 to 2019 was highest in Austria (+14.5%) and lowest in Slovenia (-5.1%) (European Commission, 2020a).

In the same period (2005–2017), the number of scheduled flights in Europe increased by 14%, whereas the number of city pairs with scheduled flights during most weeks of the year increased by 43% (EASA, 2020). By 2019, the low-cost air carriers served more city pairs than the traditional airlines in Europe.

With regard to freight air transport, the total cargo tonnage on all-cargo flights and in the hold of passenger aircraft grew by 55% from 2005 to 2017. Hold cargo recorded a more significant growth than all-cargo flights. For all-cargo flights, there is a tendency towards the use of larger aircraft with a take-off weight of more than 50 tonnes (EASA, 2020). However, from 2018 to 2019, air freight and mail transport in the EU decreased by 4.1% after several years of continuous growth, as a result of the United Kingdom (UK) leaving the EU on 31 January 2020 (European Commission, 2020a). Overall, the role of air transport for freight is less pronounced than for passenger transport, since aircraft are an expensive mode of transport in terms of tonne-kilometres and thus only competitive for long distances and high-value or perishable goods (European Commission, 2020a).

The net profit of commercial airlines in Europe increased from USD 1 billion in 2013 to USD 6.5 billion in 2019. In the latter year, the Lufthansa Group was the leading airline in Europe based on revenue, while the Ryanair Group was the leading airline based on passenger transport (Statista, 2022a). Overall, European commercial aviation recorded the highest market share in 2019. The most prominent factors driving the growth of the sector by 2019 were the expansion of the low-cost air carriers, the increase in disposable income of European citizens and a rise in economic activities around Europe. In the mid- and late 2010s, European commercial airlines were investing heavily in the modernisation and expansion of their existing fleet (Mordor Intelligence, 2021).

1.5. Context of European social dialogue in the civil aviation sector

The liberalisation of the EU air services market since the late 1980s has contributed to significant improvements to the sector, which can be measured by key figures such as growth in air travel and expansion of the network of routes offered. Liberalisation and deregulation have also led to the intensification of competition and the development of new business models, in particular the emergence of LCCs. However, this new competition has prompted the traditional national flag carriers to undergo restructuring processes with a view to cutting costs. As a consequence, the traditional business model of the national carriers and the new low-fare business model have shown a tendency to converge, with the distinction becoming blurred over time. Many airlines now operate hybrid forms of business models rather than pure low-fare versus network strategies (European Commission, 2019; ETUI, 2016).

These developments have also impacted on the employment conditions in the entire civil aviation sector. Labour representatives have feared that increasing pressure to reduce costs for airlines and ground handling service providers would probably lead to a deterioration of employment and working conditions, including tighter working schedules and atypical employment arrangements beyond the standard employment contract. In fact, various 'new' employment arrangements in the industry could be identified (European Commission, 2015).

The activities of the European social partner organisations in the civil aviation sector, even prior to the formal establishment of a ESSDC in 2000, have reflected all these sectoral developments. Effective social dialogue in the sector dates back to the establishment of a joint committee in 1990. Since then, a number of joint texts have been produced, mostly joint opinions of the social partners aimed at influencing EU policymaking. These joint texts regularly reflect contemporary debates on issues such as the gradual liberalisation of the sector, and relate to subject matters such as slot allocation, flight time and staff training.

The fact that 'air transport rules have been largely harmonised at EU level to guarantee that all operators have equal access to the air transport market', while labour laws and social protection issues remain mainly a responsibility of the Member States (according to Article 153 TFEU), has led to an uneven playing field in terms of employment and working conditions, depending on national standards (European Commission, 2019, p. IV). This is one of the reasons for a relatively high level of conflict in the industry both EU-wide and in certain Member States (ETUI, 2016).

A key issue that has long occupied the sectoral social partners at EU level is working hours. The air transport industry was one of the sectors excluded from the purview of the 1993 Working Time Directive. As a consequence, the European social partners agreed in 1994 on a Recommendation on working time of ground staff, according to which the provisions of the 1993 Working Time Directive have to be applied to civil aviation ground staff. For the pilots and cabin crew, however, it took until 2000 for the social partner organisations to reach a European agreement on the organisation of working time of mobile staff in civil aviation, which was then implemented by a Council decision. These provisions stipulate maximum annual limits for flight hours (900 per year) and for total working hours (2,000 per year) (ETUI, 2016). Flight time limitations also appear in the Air Ops Regulation (Regulation No 965/2012).

Another major issue in the sector that has entailed joint social partner texts was the introduction of functional airspace blocks (FABs). These common technical and procedural rules (dating from 2006 and 2007) reorganise traffic circuits in order to streamline the European air navigation network. Moreover, the social partners agreed upon establishing a 'just culture' perspective in the industry, promoting the idea that safety in civil aviation is served by transparency and reporting rather than by punishing those who have witnessed incidents or committed mistakes themselves (2007 and 2009). Other texts were signed on workplace health and safety for aircrew (2008) and training for the ground handling subsector (2005 and 2009).

In the course of 2020, a number of joint social partner texts were signed that were addressed to the European institutions and the Member States. These introduced measures to mitigate the dramatic economic and social impacts of the COVID-19 pandemic on the sector. It is important to note that three distinct working groups have been established within the civil aviation ESSDC. This is due to the high degree of fragmentation of both interests and organisations in the sector. Accordingly, separate working groups have been set up for aircrew, ATM and ground handling activities, which enables the occupational and activity-related subgroups to deal with issues that particularly or exclusively affect them.

1.6. Impact of the COVID-19 pandemic on the European civil aviation industry

Heavily impacted by the COVID pandemic, the numbers of employees and passengers for 2020 and 2021 are not comparable to the situation of 2019, before this crisis. Historically, civil aviation activities have always been sensitive to globally disruptive events, such as the 2001 terrorist attacks, the 2008 financial crisis and the 2010 Eyjafjallajökull eruption in Iceland (see CAA, undated).

The COVID-19 pandemic has hit the European economies and labour markets, and thus the lives of individuals and societies, especially hard and to an unprecedented extent. In order to contain the spread of infection, all European countries have implemented regulations or at least recommendations to apply ‘social distancing’. This meant that businesses with high numbers of direct face-to-face contacts (such as personal services, but also civil aviation flight services) ground to a halt. It also had a detrimental, if less drastic, effect on other businesses and segments of economies. Moreover, several countries have temporarily but repeatedly closed their borders to personal movements in order to prevent large numbers of potentially infected people from entering the country. These measures resulted in large-scale shutdowns of businesses or a realignment of business models and working arrangements, so as to curb the spread of the virus. Civil aviation is one of the industries that were hit the hardest, since air traffic came close to a complete standstill in March 2020 (EBAA, 2020, p. 8). This is because the sector, as mentioned above, is highly sensitive to political and economic fluctuations, highly intertwined with other segments of the economy and thus very vulnerable to external influences and crises.

European air traffic collapsed in April and May 2020, with numbers of passengers carried and commercial flights dramatically down. Compared with the second quarter of 2019, the number of passengers carried decreased by at least 91% in all Member States with available data for the second quarter of 2020 (see Table 7). Likewise, the total numbers of commercial flights (involving passengers, freight and mail) in the EU27 decreased by 91%, 90% and 84% in April, May and June 2020, respectively, compared with the same months of the previous year (European Commission, 2020c). Table 8 lists the major EU27 airports with the largest decreases in the absolute numbers of commercial air flights from January to October 2020 compared with the same period in 2019. The largest decreases were recorded in key European air transport hubs, such as Frankfurt, Paris Charles de Gaulle and Amsterdam Schiphol.

Table 7: Air passenger transport per country, second quarter of 2020 compared with second quarter of 2019

Member State	Decrease in millions	Decrease in %
Spain	-61.6	-99
Germany	-59.1	-97
France	-44.2	-97
Italy	-42.6	-98
Netherlands	-20.9	-96

Member State	Decrease in millions	Decrease in %
Portugal	-15.0	-97
Ireland	-10.3	-98
Austria	-9.2	-98
Denmark	-9.1	-97
Finland	-5.9	-98
Hungary	-4.3	-97
Cyprus	-3.2	-98
Croatia	-3.1	-97
Bulgaria	-2.7	-91
Latvia	-2.1	-97
Lithuania	-1.7	-97
Luxembourg	-1.1	-97
Estonia	-0.8	-96
Slovakia	-0.7	-99
Slovenia	-0.5	-99

Notes: Table ordered by absolute size of decrease.

Source: European Commission, 2020b

Table 8: Drops in the number of commercial flights per airport, January–October 2020, compared with the same period in 2019

Airport	Decrease in absolute numbers	Decrease in %
Frankfurt	-251,900	-58
Paris Charles de Gaulle	-232,200	-55
Amsterdam Schiphol	-225,700	-53
Munich	-218,300	-63
Madrid–Barajas	-212,800	-60
Barcelona-El Prat	-182,500	-63
Rome-Fiumicino	-172,400	-65
Vienna International	-138,600	-60
Copenhagen	-134,900	-61
Palma de Mallorca	-129,200	-66

Notes: Table ordered by absolute size of decrease.

Source: European Commission, 2020c

In the first half of 2020, total passenger traffic at EU airports decreased by 65.6%, while freight traffic across the European airport network went down by 16% and aircraft movements by 55.7%, compared with the first half of 2019. The corresponding figures for the third quarter of 2020 (compared with the third quarter of 2019) are 76.1%, 14.5% and 59.5%, respectively (ACI, 2020).

According to the Aviation Round Table report (EBAA, 2020, p. 8), European airlines' expected revenue loss for 2020 was estimated at nearly EUR 70 billion, while that of Europe's airports stood at EUR 30.9 billion. Moreover, many regional airports in Europe are threatened with bankruptcy unless public support is provided.

The impact of COVID-19 is not uniform on all countries and civil aviation subsectors. Table 137 in Annex 4 lists the effects on employment, working conditions and employment regulations, and the economic performance of the industry and individual companies in the air transport subsector (NACE 51.10 and 51.21) for each country. The same information about ground service (part of NACE 52.23) and ATM activities (also part of NACE 52.23) is provided in Table 138 and Table 139, respectively, in the same annex.

In the **air transport subsector** (passenger and freight air transport), almost all of the Member States for which information is available record at least slight negative employment effects of the COVID-19 crisis; in several countries, such as Austria, Belgium, Denmark, France, Germany, Hungary, the Netherlands, Portugal and Sweden, at least 1,000 jobs were lost in 2020, or an aggregated 1,000 or more job losses were announced by the large airlines in these countries.

The prevailing mode of workforce reduction differs across countries and airlines, including job losses resulting from bankruptcies (as in Level Europe in Austria, two staffing agencies owned by Norwegian in Finland, Jet Time in Germany, and SAS and Air Europa in Spain), forced terminations/dismissals (such as in AUA and Laudamotion in Austria, Brussels Airlines and Ryanair in Belgium, Czech Airlines and Smartwings in Czechia, SAS in Denmark, Finnair in Finland and many more cases in several countries) and voluntary early retirement and departure schemes (Air France in France and Luxair in Luxembourg). Interestingly, airlines tended to resort to job cuts irrespective of the business model, which means that some airlines can make use of workforce reductions in times of crisis. During the COVID-19 crisis, some airline companies reduced the number of their employees, while others were able to keep employment levels intact. In only a few countries did traditional and budget airlines differ in their methods of restructuring. In Austria, for instance, the legacy airline AUA has always tended to observe the company collective agreement strictly, as well as labour law, and has always paid notably higher wages than budget competitors. However, AUA has proven less flexible in responding to the economic challenges caused by the pandemic than budget airlines that are less committed to employment regulations. Eventually, AUA had to terminate 300 pilots and 70 headquarter staff in 2020.

In general, how to restructure in times of crisis seems to depend on whether state aid is available and in what volume or form, and on the existence of effective employment retention measures, rather than on the business model. In some countries, the authorities have linked subsidies to rescue an airline with taking strategic state shares in the company in order to have a say in the company's future business orientation. This was the case with SAS (in Denmark and Sweden), Finland's Finnair, Germany's Lufthansa, Latvia's AirBaltic and Portugal's TAP. More often, however, state aid for a certain company has been made contingent on specific restructuring measures. Support in the form of state-guaranteed bank loans and non-refundable subsidies was granted to Austria's AUA in return for a guarantee to keep Vienna International Airport as AUA's hub for the next 10 years. In Germany, the bailout package worth EUR 9 billion was linked with a major restructuring programme involving 11,000 job cuts to be realised by 2023. In France, a rescue package worth EUR 7 billion in the form of state-guaranteed bank loans and direct bank loans for Air France was granted by the government in return for internal restructuring involving at least 7,500 job cuts (including ground staff). In the Netherlands, a similar bail-out arrangement was determined in that KLM received state aid of some EUR 3.4 billion in the form of a bank loan of EUR 2.4 billion and the rest as a grant from the government, which acted as guarantor for 90% of KLM's loan; in turn, bonuses will not be paid, and high earners, such as pilots, will have their salaries reduced. Portugal's TAP and the Azorean airline SATA have benefited from loans worth up to EUR 1.2 billion and EUR 133 million, respectively. In exchange, both airlines have to implement thoroughgoing cost-cutting measures, including major staff redundancies. Likewise, Blue Air and TAROM of Romania were granted state-guaranteed loans of EUR 60 million and EUR 64 million, respectively; in exchange, Blue Air is to lay off 10% of its 2020 workforce and TAROM up to 700 of its 1,800 employees.

Large-scale employment retention measures in the Member States, whether applying to the whole economy or industry-specific, have substantially contributed to keeping (part of) the workforce in the air transport sector. Among general, sector-unspecific support measures, short-time working schemes (for instance, in Austria, France, Germany, Italy and Portugal) and other forms of particularly subsidised quasi-unemployment schemes (such as the state-funded temporary lay-off system in Finland; the option to furlough employees

while receiving wage compensation, as in Germany; or the ‘technical unemployment’ scheme of Romania, providing wage subsidies of up to 75% of wages for temporarily unemployed people) as well as national employment retention schemes (see the Record of Temporary Employment Regulation (ERTE) scheme in Spain) have played a prominent role in many countries. In addition, several countries have implemented sector-specific job retention schemes and financial aid tailor-made for certain airlines; moreover, airlines have introduced their own company-specific cost-saving programmes, in line with the legal framework in their countries of operation (see Table 137 in Annex 4).

Like the air transport subsector, the **ground-based civil aviation service activities subsector** (in particular, airport-related activities) has faced varying amounts of employment losses resulting from the pandemic. In this particular segment of the industry, this sector has been most affected at larger airports, where ground handling operators and airlines manage their own ground services. Occupational groups particularly affected by job losses include handling staff and administrative staff, regardless of whether the employer is an airport, a ground handler or an airline. Nine countries saw at least 1,000 job redundancies in 2020 in the ground service subsector: Belgium, Denmark, Finland, France, Greece, Hungary, Ireland, Poland and Portugal. Data are unavailable for several countries, including Germany. It is important to note that job losses – as for the air transport activities subsector (see above) – include all forms of employment reductions, from unilateral employment terminations/dismissals to reductions by natural attrition or the use of early retirement schemes and the not hiring of seasonal workers, etc. For instance, in Belgium the bankruptcy of Swissport at Brussels Airport resulted in the immediate forced termination of 1,500 employees. In Croatia and Cyprus, no direct job losses have been reported, but job reductions in 2020 compared with the previous year resulted from the airports’ and ground handling companies’ not hiring seasonal workers during the summer period. In France, Air France announced job cuts affecting no fewer than 6,000 ground staff across the country, but sought to avoid direct redundancies by using voluntary departure schemes.

Various forms of state aid and job retention measures have alleviated the extent of job losses in many countries. In Austria, Germany and Italy, COVID-19-related short-time working schemes were broadly applied to airport and ground handler staff, preventing – at least in Austria and Italy – large-scale redundancies in 2020. In Belgium, the ground handling company Aviapartner at Brussels Airport received a state loan worth EUR 25 million and could continue operations without collective dismissals. In Denmark, airports and ground handling providers took advantage of a wage compensation scheme for furloughed employees; however, after this scheme had expired in August 2020, many employees were laid off. A similar wage subsidy measure targeting employees of Estonia’s Tallinn Airport worth EUR 2 million could likewise not prevent the lay-off of 111 workers in May 2020. Similarly, the introduction of rotation employment schemes at the ground handling providers Swissport and Skyserv and the airline Goldair in Greece – with employees working one to four days per week on rotating shifts based on operational needs – were only partially successful in preventing collective dismissals. In the Netherlands, the airline Transavia drew on a general, sector-unspecific temporary emergency measure for the preservation of jobs, in order to ensure employment for its 2,600-strong workforce. General, sector-unspecific state aid schemes were also used in Finland, Ireland, Italy, Lithuania, Luxembourg and Slovakia, whereas sector-specific state aid programmes were applied in Poland, Romania and Spain.

Apart from state aid schemes, some ground service companies benefited from social partner initiatives and innovative collective bargaining. For instance, at Croatia’s Zagreb Airport an annex to the pre-existing company collective agreement provided for a postponement of part of regular pay and bonuses; moreover, temporary ‘inactive working hours’ were introduced, exempting employees, for a certain period of time, from work obligations, with a salary compensation of 70% of full hourly rates. In Luxembourg, a tripartite agreement concluded for the entire civil aviation sector not only stipulates early retirement schemes for part

of the sector's workforce threatened by redundancy, but also introduces reclassification and training programmes for redundant staff, enabling them to be assigned to other posts in civil aviation or even other sectors.

Regardless of the application of support measures and mechanisms, the pandemic has put the subsector's workers under intense pressure to accept major deteriorations in pay and working conditions from employers, funders and authorities. Such situations have been reported from Ireland, Latvia, Malta, the Netherlands, Poland and Portugal (for more details see Table 137 in Annex 4).

In contrast to air transport and ground service activities, workforce reductions in the **air traffic management subsector** as a consequence of the COVID-19 pandemic occurred only rarely and to a minor extent. There are a number of reasons for this. First, air traffic control providers are obligated to keep services available to all airspace and airport users regardless of traffic levels. Second, ATM workers and, in particular, ATCOs enjoy a privileged position with regard to pay and indispensability, due to their specific skills and the crucial task they perform. Since in most countries there appears to be a shortage of qualified ATM staff, they are not easily replaceable because of the two years or more it takes to train a new ATCO. Moreover, in many countries ATM services form part of public administration or are private-law entities fully or partially owned by the state, which – in terms of employment – translates into a civil service status or a private-law employment relationship carrying some of the privileges usually reserved for public employees. Last, but not least, as a small and highly qualified occupational group, ATCOs tend to be unionised and thus equipped with exceptional bargaining power vis-à-vis the employer and other stakeholders.

Workforce reductions among ATM workers have been reported only from a handful of countries, including Denmark (only voluntary departures), Estonia (where 40 employees were actually dismissed) and Sweden (60 redundancies planned for 2020).

Due to the dramatic overall decline in air traffic since March 2020, almost all European ATM service providers had to face significant losses in turnover and revenue. ATM units are usually financed by levies put on each flight crossing a national air space. Due to a significant decline in flights, the income of the organisations in charge of flight navigation has declined significantly. Therefore, ATM service providers have had – one way or another, depending on the type of organisation – to be financed outside the usual sources of revenue. In Austria, the Austro Control navigation service provider has resorted to a coronavirus work scheme to save on labour costs in the short run. Belgium's Skeyes benefited from state support worth EUR 60 million approved by the government in July 2020, and implemented a new time registration system and a new telework regime in order to cope with COVID-19 constraints.

In Czechia, Air Navigation Services received a non-refundable subsidy of EUR 19 million, and it reduced working hours and salaries by 30%–50%. Denmark's Naviair made use of the new wage compensation scheme, whereas ANS Finland turned to the temporary lay-off scheme, which was applied to almost all of its 415 employees. Oro Navigacija of Lithuania received some state support for idle time, while LGS in Latvia temporarily suspended the application of the company collective agreement to save on costs. In the Netherlands, LVNL received extra government financing worth EUR 120 million to cover its costs. In Poland, PANSAs and the company trade unions failed to reach an agreement on a controlled reduction of wages; PANSAs management eventually resorted to unilateral reductions of salaries up to 30%. NAV Portugal made use of a state funding mechanism that guarantees the organisation's capacity to act. Similarly, Sweden's LFV received financial aid worth EUR 90 million in 2020.

The above analysis is based on three tables in Annex 4 of this report (Tables 136, 137 and 138).

2. National aviation sector trade unions

This chapter presents an overview of the national-level trade unions and employer organisations active in the civil aviation sector. This study has identified 166 sector-related trade unions in the EU27. All of these will be introduced in terms of NACE code representation, which professional groups or types of aviation activities they represent, number of members and their involvement in collective bargaining or national social dialogue. A separate analysis has also been made for each of the three subsectors. This allows a focus on the 71 trade unions organising aircrew, the 82 or 83⁹ organising ATCOs or ATM employees and, finally, the 88 or 89 organising employees of ground handling service providers in airports.

Table 9: Number of trade unions in the civil aviation sector (in the three subsectors)

Member State	Aircrew	Ground handling activities	ATM activities	Total
AT	2	2	2	4
BE	5	6	7	8
BG	0	At least 1	2	3
CY	0	3	2	5
CZ	2	2	3	6
DE	3	5	3	7
DK	3	3	2	7
EE	1	1	2	2
EL	1	2	4	5
ES	6	3	4	7
FI	4	3	3	7
FR	9	10	6	15
HR	3	7	6	11
HU	1	3	4	7
IE	3	1	1	3
IT	6	4	5	7
LT	0	1	1	2
LU	3	2	3	4
LV	2	2	2	3
MT	3	At least 1	At least 1	5
NL	3	6	3	10
PL	1	At least 1	3	5
PT	4	At least 6	At least 3	13
RO	1	1	3	4
SE	2	5	1	6
SI	0	3	3	6
SK	0	1	1	2
EU27	72	82 or 83	88 or 89	166

Notes: Since the same organisation may cover more than just one subsector and thus may be counted multiple times in this table, the aggregate numbers of trade unions in the civil aviation sector per country may be lower than the sum of all subsector numbers. A list of all trade unions can be found in Annex 1. For Bulgaria see footnote 9.

Source: Network of Eurofound Correspondents

Whereas there are trade unions in every country representing ground handling and ATM workers, there is no representation of employees in the air transport activities subsector in Bulgaria, Cyprus, Lithuania,

⁹ In Bulgaria, the trade union FTW-CL Podkrepa was not included in the data collection conducted for this study, as it was not assessed as sector-related by the national correspondent. However, ETF indicated that this trade union is sector-related and covers ground handling activities and ATM activities, so it is included in Table 9 with no precise confirmation.

Slovakia and Slovenia. (Air transport activities in Slovenia ceased in 2019.) By contrast, in 12 Member States there are no employer organisations representing any of the three subsectors. This applies in Croatia, Cyprus, Czechia, Estonia, Ireland, Latvia, Lithuania, Luxembourg, Malta, Poland, Romania and Slovenia. Most employer organisations can be found in the ground handling subsector, while about two-thirds of the Member States lack a sector-related employer organisation in either air transport or ATM activities, or both. The fact that there are far more trade unions than employer organisations in the entire civil aviation sector is because of the predominance of large companies, which are often the principal industrial relations actors. This is particularly true of the air transport (large airlines) and ATM (monopoly position of ATM agencies) subsectors. In Czechia (CZATSEA) and Poland (KM NSZZ Solidarność PLL LOT and ZZPK PLL LOT SA) there are trade unions that are sector-related in terms of membership, but they are neither involved in sector-related collective bargaining nor affiliated to a relevant European-level social partner organisation. Likewise, several business organisations related to the civil aviation sector have been listed in the national reports but do not qualify for the assessment of the representativeness in this study, since for the assessment of the representativeness they cannot be considered integrated in the sectoral industrial relations system in the given countries. This is the case of ELK in Estonia, UAF in France, MVVLSz in Hungary, LAA in Latvia, APTTA in Portugal, AAR in Romania, ALA in Spain and Svenskt Flyg in Sweden.

2.1. Coverage, sector-relatedness and organisational density of trade unions in the civil aviation sector

Table 10 indicates the numbers of trade unions organising different groups of employees or types of activities in the aviation sector. Table 11 lists all trade unions, indicating types of employees represented in the aviation sector.

Table 10: Numbers of trade unions organising different parts of the aviation sector

Group of employees	Number of trade unions	Number of Member States	Total number of trade unions	% of all aviation trade unions	Total number of Member States
Pilots for passenger air transport	50	20	72	43	22
Pilots for freight air transport	31	13			
Cabin crew	51	21			
ATC	55	26	83	50	27
ATSEP	47	22			
Other ATM employees	60	24			
Baggage handling	63		89	54	27
Ticket desk, check-in and boarding	62				
Airport security	48				
Aircraft maintenance	67				
Airport fire services	37				
Services to aircraft, fuelling, catering, de-icing, towing, etc.	62				
All aviation sector trade unions together			166	100	27

Note: Separate lists of all trade unions are included in Tables 126, 127 and 128 in Annex 4.

Source: Network of Eurofound Correspondents, 2020

Table 11: Categories of workers represented by all aviation sector trade unions

Member State	Trade union	Pilots (passenger)	Pilots (freight)	Cabin crew	ATC	ATSEP	Other ATM staff	Baggage handling	Ticket desk, check-in and boarding	Airport security	Aircraft maintenance	Airport fire services	Services to aircraft, fuel, catering, pushbacks
AT	ACA	yes											
AT	Vida	yes		yes	yes	yes	yes	yes		yes	yes	yes	yes
AT	GPA-djp								yes				
AT	GPF				yes	yes	yes						
BE	BBTK-SETCa	yes	yes	yes	yes	yes	yes		yes	yes	yes	yes	yes
BE	ACLVB-CGSLB	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes
BE	ACV Puls	yes	yes	yes	yes	yes	yes		yes	yes	yes	yes	yes
BE	ACV-CSC CNE	yes	yes	yes	yes	yes	yes		yes	yes	yes	yes	yes
BE	BeCA	yes	yes			yes		yes		yes	yes	yes	yes
BE	ABVV-FGTB BTB-UBT												
BE	ACV-CSC Transcom												
BE	BGATCo ¹⁰												
BG	FTTUB				yes	yes	yes	yes	yes	yes	yes		yes
BG	FTW-CL Podkrepa ⁹												
BG	BATCoU												
CY	OIYK-SEK							yes	yes		yes		yes
CY	PASEY-PEO							yes	yes		yes		yes
CY	CYATCoU				yes		yes ¹¹						

¹⁰ ATCEUC reported that BGATCo is not a trade union but a professional association; the collective bargaining is done by ACV on behalf of BGATCo. De facto, however, it works as the negotiator for ATC and ATM employees.

¹¹ For Cyprus, CYATCO represents ATCOs and former ATCOs who have been promoted into management functions.

Member State	Trade union	Pilots (passenger)	Pilots (freight)	Cabin crew	ATC	ATSEP	Other ATM staff	Baggage handling	Ticket desk, check-in and boarding	Airport security	Aircraft maintenance	Airport fire services	Services to aircraft, fuel, catering, pushbacks
CY	PASYDY ¹²				yes		yes						
CY	SYCHTHEM-DEOK							yes	yes		yes		yes
CZ	OOPL	yes		yes									
CZ	CZALPA	yes											
CZ	OSD					yes		yes	yes	yes		yes	
CZ	OSZL								yes		yes		yes
CZ	CZATCoA				yes		yes						
CZ	PV OSD						yes						
CZ	CZATSEA					yes	yes						
DE	ver.di	yes	yes	yes	yes			yes	yes	yes	yes	yes	yes
DE	VC	yes	yes										
DE	UFO			yes									
DE	dbb				yes	yes	yes	yes		yes			
DE	GdF				yes	yes	yes						yes
DE	TGL/IGL										yes		
DE	GdP									yes			yes
DK	FPU	yes	yes	yes									
DK	DALPA	yes											
DK	CUD			yes									
DK	HK Privat						yes		yes	yes			
DK	3F							yes		yes		yes	yes
DK	Dansk Metal										yes		
DK	DATCoA				yes	yes	yes						

¹² ATCEUC indicated that PASYDY is a trade union organising mainly civil servants, and also a small number of ATCOs. Most ATCOs, however, are organised by CYATCO, which is affiliated to ATCEUC.

Member State	Trade union	Pilots (passenger)	Pilots (freight)	Cabin crew	ATC	ATSEP	Other ATM staff	Baggage handling	Ticket desk, check-in and boarding	Airport security	Aircraft maintenance	Airport fire services	Services to aircraft, fuel, catering, pushbacks
EE	ETTA										yes		
EE	EstATCoA				yes								
EL	RACU			yes									
EL	EEEKE				yes								
EL	HACU				yes								
EL	OSYPA					yes	yes				yes	yes	
EL	OPAM						yes	yes	yes	yes	yes	yes	yes
ES	SEPLA	yes	yes										
ES	FSC-CCOO	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes		
ES	FeSMC-UGT	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes		
ES	FS-USO	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes		
ES	SITCPLA			yes									
ES	STAVLA			yes									
ES	USCA				yes								
FI	AKT/SLSY			yes									
FI	FPA	yes											
FI	YTY	yes			yes								
FI	Pro			yes				yes		yes	yes		
FI	IAU							yes	yes	yes	yes		yes
FI	JHL							yes	yes	yes		yes	yes
FI	SLJY				yes								
FR	FEETS-FO	yes	yes	yes				yes	yes	yes	yes		yes
FR	SNPNC			yes									
FR	FNEMA-CFE CGC												
FR	UNSA Transport												
FR	CGT Transports												
FR	FGT CFTC	yes						yes	yes				

Member State	Trade union	Pilots (passenger)	Pilots (freight)	Cabin crew	ATC	ATSEP	Other ATM staff	Baggage handling	Ticket desk, check-in and boarding	Airport security	Aircraft maintenance	Airport fire services	Services to aircraft, fuel, catering, pushbacks
FR	SNPL	yes	yes	yes									
FR	SPAF	yes											
FR	ALTER	yes											
FR	SNPNAC			yes									
FR	SNCTA				yes	yes	yes						
FR	USAC				yes	yes	yes						
FR	FGTE-CFDT	yes	yes	yes	yes	yes	yes	yes	yes		yes	yes	yes
FR	CGT Commerce								yes	yes			yes
FR	CGT Ports et Docks							yes	yes		yes		yes
FR	CGT Service Public					yes	yes	yes	yes		yes	yes	yes
FR	SUD Aérien							yes	yes	yes	yes	yes	yes
HR	ORCA	yes		yes							yes		
HR	SKOZ	yes		yes			yes						
HR	HSPP	yes		yes			yes						
HR	SHSZUZ						yes	yes	yes		yes		yes
HR	SZTH						yes	yes	yes		yes		yes
HR	SSDUZ										yes		yes
HR	CATCoU				yes	yes					yes		
HR	SDHKZP				yes	yes					yes		
HR	SRAZ					yes	yes	yes	yes	yes			yes
HR	NSSZZLD						yes	yes	yes	yes	yes		
HR	NSSZLSK						yes	yes	yes		yes		yes
HU	HUNALPA	yes	yes										
HU	RDSZSZ									yes	yes		yes
HU	RMFSz										yes		yes
HU	LESZ					yes		yes	yes	yes			yes
HU	LIGOSZ						yes						

Member State	Trade union	Pilots (passenger)	Pilots (freight)	Cabin crew	ATC	ATSEP	Other ATM staff	Baggage handling	Ticket desk, check-in and boarding	Airport security	Aircraft maintenance	Airport fire services	Services to aircraft, fuel, catering, pushbacks
HU	IDFSZ					yes							
HU	Control MLISZ												
IE	IALPA	yes	yes										
IE	Forsa			yes	yes	yes	yes						
IE	SIPTU			yes			yes	yes	yes	yes	yes	yes	yes
IT	FIT-CISL	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes
IT	FILT-CGIL	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes
IT	UIL Trasporti	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes
IT	UGL Trasporto Aereo	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes
IT	ANPAC	yes	yes	yes									
IT	ANPAV	yes	yes	yes									
IT	Unica				yes	yes	yes						
LT	LPSDPS									yes			
LT	LATCoA				yes		yes						
LU	SAC-OGBL	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes
LU	ALPL-LCGB	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes
LU	NGL-SNEP	yes	yes	yes									
LU	LGATCo				yes								
LV	LAA	yes		yes					yes				
LV	LAAF	yes		yes	yes			yes	yes	yes	yes		yes
LV	LADA				yes	yes	yes						
MT	UCC			yes									
MT	ALPA	yes											
MT	GWU			yes		yes	yes	yes	yes	yes	yes	yes	yes
MT	MATCoA												
MT	UHM												
NL	VNC			yes									

Member State	Trade union	Pilots (passenger)	Pilots (freight)	Cabin crew	ATC	ATSEP	Other ATM staff	Baggage handling	Ticket desk, check-in and boarding	Airport security	Aircraft maintenance	Airport fire services	Services to aircraft, fuel, catering, pushbacks
NL	VNV	yes	yes										
NL	FNV Cabine			yes									
NL	FNV Luchtvaart												
NL	CNV Vakmensen												
NL	De Unie							yes	yes	yes			yes
NL	VKP							yes	yes		yes		yes
NL	VNLG				yes								
NL	VPS							yes		yes		yes	
NL	NVLT					yes					yes		yes
PL	ZZNPL												
PL	ZZPiL			yes									
PL	ZZPK PLL LOT SA	yes											
PL	KM NSZZ Solidarność	yes		yes									
PL	PLL LOT	yes		yes									
PL	ZZKRL				yes								
PL	KSPTLIOL							yes	yes		yes	yes	
PL	ZZKLW				yes								
PT	SPAC	yes	yes										
PT	APPLA	yes	yes										
PT	SIPLA	yes											
PT	SNPVAC			yes									
PT	SITAVA						yes	yes	yes		yes		yes
PT	STHA							yes	yes		yes		yes
PT	SINCTA				yes		yes						
PT	SITECSA				yes		yes						
PT	SIMA										yes		
PT	SINTAC						yes	yes	yes		yes		yes

Member State	Trade union	Pilots (passenger)	Pilots (freight)	Cabin crew	ATC	ATSEP	Other ATM staff	Baggage handling	Ticket desk, check-in and boarding	Airport security	Aircraft maintenance	Airport fire services	Services to aircraft, fuel, catering, pushbacks
PT	SQAC						yes	yes	yes		yes		yes
PT	SINDAV							yes	yes		yes		yes
PT	SITEMA										yes		
RO	FNSA	yes		yes									
RO	SNTT							yes	yes	yes	yes	yes	
RO	ATSR				yes	yes	yes						
RO	FSA				yes	yes	yes						
SE	Unionen			yes				yes	yes	yes	yes		yes
SE	SPF	yes	yes										
SE	SEKO							yes		yes	yes		yes
SE	STF												
SE	ST				yes	yes	yes		yes				
SE	Kommunal											yes	
SI	SSAL							yes	yes			yes	yes
SI	SAL							yes	yes			yes	yes
SI	SPGAE							yes	yes			yes	yes
SI	SAITS				yes	yes	yes						
SI	SATS				yes	yes	yes						
SI	SSKL				yes	yes	yes						
SK	IOZ							yes	yes	yes	yes	yes	yes
EU	168 trade unions												

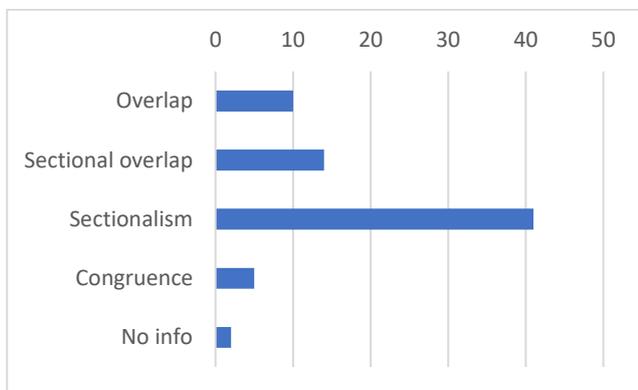
Notes: Green shading indicates that this professional group or employees in this sectoral activity are organised by this trade union. Light orange shading indicates organisations identified as professional associations or guilds rather than trade unions, as they are not involved in collective bargaining. They were included in this study because they are affiliated to a European social partner organisation involved in the ESSDC. Yellow shading indicates trade unions included after the data collection was finalised, for which sectoral coverage could not be confirmed by the national correspondents.

Source: Network of Eurofound Correspondents, 2020

Trade union sector-relatedness has been assessed above regarding whether their membership includes employees active in the three main parts of the sector: passenger and freight air traffic under NACE 51.10 and 51.21, covering pilots and cabin crew; ATM services under NACE 52.23, covering ATCOs, ATSEP and other ATM staff; and all kind of ground handling services under NACE 52.23, covering a wide range of employees/occupations from baggage handlers to security staff.

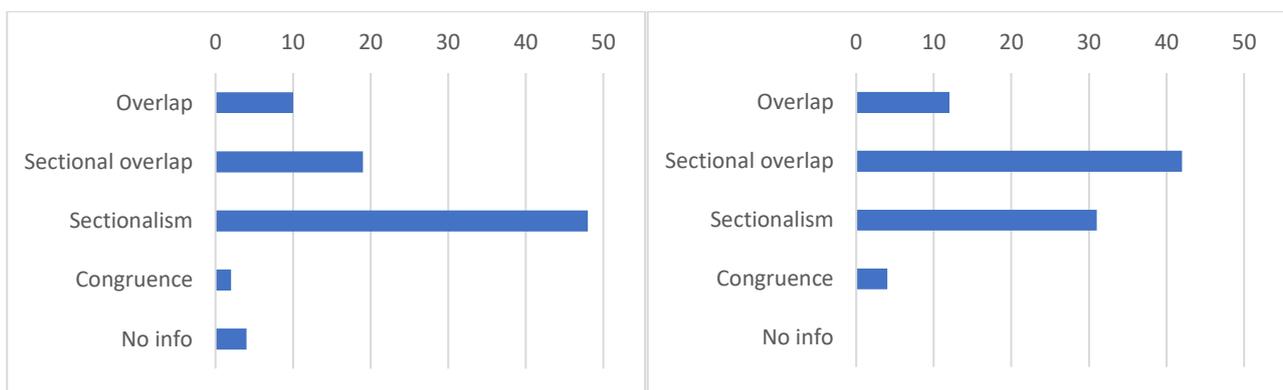
Additional factors regarding sector-relatedness are whether all categories of employees (white- and blue-collar workers) are represented, whether employees in all types of companies (all size classes and forms of ownership), as far as they exist in the sector, are represented, and whether employees across the country can be part of the trade union. On the basis of these factors, a trade union is categorised as being congruent, overlapping or sectional or having section overlap with regard to membership. Overlapping representation indicate links with other sectors, while sectionalism might contribute to fragmentation (if different organisations cover different parts of the sector) or pluralism (if different organisations have similar memberships). The numbers of trade unions in the civil aviation sector that fall into the four categories of sector-relatedness are presented in Figures 10 and 11.

Figure 10: Sector-relatedness of 72 trade unions organising aircrew



Source: Network of Eurofound Correspondents, 2020

Figure 11: Membership domains of 83 trade unions organising ATM employees (left) and 89 trade unions organising ground handling employees (right)



Source: Network of Eurofound Correspondents, 2020

Figures 10 and 11 indicate that about 80% of the trade unions representing each of the three subsectors have membership representation that is sectional or has sectional overlap with the whole civil aviation sector. This means that the trade unions organise only a specific part of the sector (with regard to worker category, business activity, type of company or territorial coverage), irrespective of whether they also organise

employees in other sectors or not. In the air transport subsector, very few trade unions have membership representation that is congruent, covering all activities in the civil aviation sector, without any overlap in other sectors. The trade unions that also organise employees in other sectors have an overlapping membership domain or sectional overlap. This is the case for 33% of trade unions organising aircrews and 35% of trade unions organising ATM employees.

Of the trade unions representing ground handling employees, 61% also have members in other sectors. This is because they are more often general transport unions, also organising other transport sectors, while among the trade unions organising aircrew and ATM employees there are more organisations that focus on one professional group, only in the civil aviation sector. Moreover, sectional overlapping membership representation frequently stems from cross-sector trade unions that organise only blue- or white-collar workers.

Beyond the question of the ‘abstract’ membership representation pattern, Table 12 offers an overview of the reasons for the membership representation pattern assigned to each individual trade union. If not all civil aviation subsector activities/types of companies, all types and categories of workers and all regions of a country are covered by the membership representation, the pattern is sectional or – if other sectors outside civil aviation are also covered – there is sectional overlap. Otherwise, the membership representation pattern has to be regarded as congruent or overlapping.

Table 12: Membership domains of trade unions with regard to the sector in detail, 2020

Member State	Trade union	Membership domain pattern	All civil aviation sector activities covered	All types of workers covered	Entire country covered	Members in other sectors
AT	Vida	SO	no	no	yes	yes
AT	GPA-djp	SO	no	no	yes	yes
AT	GPF	SO	no	yes	yes	yes
AT	ACA	S	no	no	yes	no
BE	ABVV-FGTB BTB-UBT	SO	no	no	yes	yes
BE	BBTK-SETCa	SO	no	no	yes	yes
BE	ACLVB-CGSLB	O	yes	yes	yes	yes
BE	ACV-CSC Transcom	SO	no	no	yes	yes
BE	ACV-CSC CNE	SO	no	no	yes	yes
BE	ACV Puls	SO	no	no	yes	yes
BE	BGATCo	S	no	no	yes	no
BE	BeCA	S	no	no	yes	no
BG	FTTUB	O	yes	yes	yes	yes
BG	FTW-CL Podkrepa	n.a.	n.a.	n.a.	n.a.	n.a.
BG	BATCoU	n.a.	n.a.	n.a.	n.a.	n.a.
CY	OIYK-SEK	SO	no	yes	yes	yes
CY	PASEY-PEO	SO	no	yes	yes	yes
CY	CYATCoU	S	no	no	yes	no
CY	PASYDY	SO	no	no	yes	yes
CY	SYCHTHEM-DEOK	SO	no	yes	yes	yes
CZ	OSD	SO	no	yes	yes	yes
CZ	OSZL	SO	no	yes	yes	yes
CZ	CZATCoA	S	no	yes	yes	no
CZ	PV OSD	S	no	yes	yes	no

Member State	Trade union	Membership domain pattern	All civil aviation sector activities covered	All types of workers covered	Entire country covered	Members in other sectors
CZ	OOPL	S	no	no	yes	no
CZ	CZALPA	S	no	no	yes	no
DE	ver.di	O	yes	yes	yes	yes
DE	dbb	SO	no	no	yes	yes
DE	GdF	S	no	no	yes	no
DE	TGL/IGL	S	no	no	yes	no
DE	GdP	SO	no	no	yes	yes
DE	VC	S	no	no	yes	no
DE	UFO	S	no	no	yes	no
DK	HK Privat	SO	no	no	yes	yes
DK	3F	SO	no	no	yes	yes
DK	Dansk Metal	SO	no	no	yes	yes
DK	DATCoA	S	no	no	yes	no
DK	FPU	S	no	no	yes	no
DK	DALPA	S	no	no	yes	no
DK	CUD	S	no	no	yes	no
EE	ETTA	O	yes	yes	yes	yes
EE	EstATCoA	S	no	no	yes	no
EL	EEEEKE	S	no	no	yes	no
EL	HACU	S	no	no	no	no
EL	OSYPA	S	no	no	yes	no
EL	OPAM	S	no	no	yes	no
EL	RACU	S	no	no	yes	no
ES	FSC-CCOO	O	yes	yes	yes	yes
ES	FeSMC-UGT	O	yes	yes	yes	yes
ES	FS-USO	SO	no	no	yes	yes
ES	USCA	S	no	no	yes	no
ES	SEPLA	S	no	no	yes	no
ES	SITCPLA	S	no	no	yes	no
ES	STAVLA	S	no	no	yes	no
FI	IAU	S	no	no	yes	no
FI	Pro	SO	no	no	yes	yes
FI	JHL	SO	no	yes	yes	yes
FI	SLJY	S	no	no	yes	no
FI	YTY	SO	no	no	yes	yes
FI	AKT/SLSY	S	no	no	yes	no
FI	FPA	S	no	no	yes	no
FR	SNCTA	S	no	no	yes	no
FR	USAC	S	no	no	yes	no
FR	FGTE-CFDT	O	yes	yes	yes	yes
FR	UNSA Transport	SO	yes	no	yes	yes
FR	CGT Transports	SO	no	yes	yes	yes
FR	CGT Commerce	SO	no	yes	yes	yes
FR	CGT Ports et Docks	SO	no	yes	no	yes
FR	CGT Service Public	SO	no	yes	yes	yes

Member State	Trade union	Membership domain pattern	All civil aviation sector activities covered	All types of workers covered	Entire country covered	Members in other sectors
FR	FGT CFTC	O	yes	yes	yes	yes
FR	FNEMA-CFE CGC	S	no	no	yes	no
FR	SNPNC	S	yes	no	yes	no
FR	SNPNAC	S	no	no	yes	no
FR	SUD Aérien	SO	no	yes	yes	yes
FR	FEETS-FO	SO	no	no	yes	yes
FR	SNPL	S	yes	no	yes	no
FR	SPAF	S	no	no	yes	no
FR	ALTER	S	no	no	yes	no
HR	SHSZUZ	S	no	no	yes	no
HR	ORCA	S	no	no	yes	no
HR	SZTH	S	no	no	yes	no
HR	SSDUZ	S	no	no	yes	no
HR	CATCoU	S	no	no	yes	no
HR	SDHKZP	S	no	no	yes	no
HR	SRAZ	S	no	no	no	no
HR	NSSZZLD	S	no	no	no	no
HR	NSSZLSK	S	no	no	no	no
HR	SKOZ	S	no	no	yes	no
HR	HSPP	S	no	no	yes	no
HU	RDSZSZ	S	no	n.a.	yes	no
HU	RMFSz	S	no	no	no	no
HU	LESZ	S	no	yes	yes	no
HU	LIGOSZ	S	no	no	no	no
HU	IDFSZ	S	no	no	no	no
HU	Control MLISZ	S	no	no	yes	no
HU	HUNALPA	S	no	no	yes	no
IE	SIPTU	SO	no	no	yes	yes
IE	Forsa	SO	no	no	yes	yes
IE	IALPA	S	no	no	yes	no
IT	FIT-CISL	O	yes	yes	yes	yes
IT	FILT-CGIL	O	yes	yes	yes	yes
IT	UIL Trasporti	O	yes	yes	yes	yes
IT	UGL Trasporto Aereo	C	yes	yes	yes	no
IT	Unica	S	no	no	yes	no
IT	ANPAC	S	no	no	yes	no
IT	ANPAV	S	no	no	yes	no
LT	LPSDPS	SO	no	yes	yes	yes
LT	LATCoA	S	no	no	yes	no
LU	NGL-SNEP	No info	No info (only 50 members)	No info	yes	no
LU	SAC-OGBL	C	yes	yes	yes	no
LU	LCGB	O	yes	yes	yes	yes
LU	LGATCo	S	no	no	yes	no
LU	ALPL-LCGB	O	yes	yes	yes	yes

Member State	Trade union	Membership domain pattern	All civil aviation sector activities covered	All types of workers covered	Entire country covered	Members in other sectors
LV	LAA	C	yes	yes	yes	no
LV	LAAF	C	yes	yes	yes	no
LV	LADA	S	no	no	yes	no
MT	GWU	SO	no	no	yes	yes
MT	MATCoA	n.a.	n.a.	n.a.	n.a.	n.a.
MT	UHM	n.a.	n.a.	n.a.	n.a.	n.a.
MT	UCC	S	no	no	yes	no
MT	ALPA	S	no	no	yes	no
NL	FNV Luchtvaart	SO	no	yes	yes	yes
NL	CNV Vakmensen	SO	no	yes	yes	yes
NL	De Unie	SO	no	yes	yes	yes
NL	VKP	S	no	yes	yes	no
NL	VNLG	S	no	no	yes	no
NL	VPS	S	no	yes	no	no
NL	NVLT	S	no	yes	yes	no
NL	VNC	S	no	no	yes	no
NL	VNV	S	no	no	yes	no
NL	FNV Cabine	SO	no	no	yes	yes
PL	ZZPK PLL LOT SA	S	no	no	yes	no
PL	KM NSZZ Solidarność PLL LOT	S	no	no	yes	no
PL	ZZKRL	S	no	no	yes	no
PL	KSPTLiOL	S	no	yes	yes	no
PL	ZZKLW	S	no	no	no	no
PL	ZZNPL	S	no	no	yes	no
PL	ZZPiL	S	no	yes	yes	no
PT	SITAVA	S	no	yes	yes	no
PT	STHA	S	no	yes	yes	no
PT	SINCTA	S	no	no	yes	no
PT	SITECSA	S	no	no	yes	no
PT	SIMA	SO	no	no	yes	yes
PT	SINTAC	S	no	no	yes	no
PT	SQAC	S	yes	no	yes	no
PT	SINDAV	S	no	no	yes	no
PT	SITEMA	SO	no	no	yes	yes
PT	SPAC	S	no	no	yes	no
PT	APPLA	S	no	no	yes	no
PT	SIPLA	S	no	no	yes	no
PT	SNPVAC	S	no	no	yes	no
RO	ATSR	S	no	no	yes	no
RO	FSA	S	no	yes	yes	no
RO	SNTT	SO	no	yes	yes	yes
RO	FNSA	C	yes	yes	yes	no
SE	Unionen	SO	no	no	yes	yes
SE	SEKO	SO	no	no	yes	yes

Member State	Trade union	Membership domain pattern	All civil aviation sector activities covered	All types of workers covered	Entire country covered	Members in other sectors
SE	STF	SO	no	no	yes	yes
SE	ST	SO	no	no	yes	yes
SE	Kommunal	SO	no	no	yes	yes
SE	SPF	S	no	no	yes	no
SI	SSAL	S	no	yes	yes	no
SI	SAL	S	no	yes	yes	no
SI	SPGAE	S	no	yes	yes	no
SI	SAITS	S	no	yes	yes	no
SI	SATS	S	no	yes	yes	no
SI	SSKL	S	no	yes	yes	no
SK	IOZ	SO	no	no	yes	yes
SK	MOZRLP SR	S	no	no	no	no

Notes: C, congruence; n.a., data not available; O, overlap; S, sectionalism; SO, sectional overlap. Orange shading indicates organisations identified as professional associations or guilds rather than trade unions. Green shading indicates a positive response. Names in bold are affiliated to at least one of the European organisations ETF, ECA, EurECCA and ATCEUC. Yellow shading indicates trade union included after the data collection was finalised for which sectoral coverage could not be confirmed by the national correspondents.

Source: Network of Eurofound Correspondents, 2020

Table 12 indicates that only a minority of sector-related trade unions record membership domains that cover all subsector business activities of civil aviation. Slightly more unions organise all types and categories of workers, as far as they are present in the sector, while almost all trade unions cover the whole territory of the country.

Regarding sector-relatedness, there is a distinction to be made between the 114 trade unions (69%) that organise employees in only one of the three subsectors (Table 13), and the 52 trade unions (31%) that organise two or three of the aviation subsectors (Table 14). There are 42 trade unions in 20 Member States that only organise aircrew. Another 35 trade unions in 21 Member States represent only ATM staff. There are 37 trade unions that only organise ground handling employees, from 16 Member States.

Among the 52 trade unions that represent two or three of the subsectors, 21 (13%) from 11 Member States cover all three subsectors. Trade unions that represent both ATM staff and ground handling staff have the most frequently occurring overlap between two subsectors in membership representation. There are 47 trade unions organising both ATM staff and ground handling employees in 22 Member States. There are 45 trade unions organising aircrew and ground handling staff in 16 Member States. The least frequent overlap between two subsectors is between aircrew and ATM staff, represented by 36 trade unions in 15 Member States.

Table 13: Aviation sector trade unions organising only one subsector

Member State	Only aircrew	Only ATM	Only airport and ground handling services staff
AT	ACA	GPF	GPA-djp
BE	BeCA		ABVV-FGTB BTB-UBT, CV-CSC Transcom
CY		CYATCoU, PASYDY	OIYK-SEK, PASEY-PEO, SYCHTHEM-DEOK
CZ	OOPL, CZALPA	CZATCoA, PV OSD, CZATSEA	OSZL
DE	VC, UFO		GdP, TGL/IGL

Member State	Only aircrew	Only ATM	Only airport and ground handling services staff
DK	FPU, DALPA, CUD	DATCoA	3F, Dansk Metal
EE		EstATCoA	
EL	RACU	EEEEK, HACU	
ES	SEPLA, SITCPLA, STAVLA	USCA	
FI	AKT/SLSY, FPA	SLIY	IAU
FR	ALTER, SNPL, SPAF, SNPNC, SNPAC	USAC, SNCTA	CGT Commerce, CGT Ports et Docks, SUD Aérien
HR	SKOZ, HSPP	SDHKPZ, CATCoU	SSDUZ, SZTH
HU	HUNALPA	LIGOSZ, IDFSZ, Control MLISZ	RMFSz, RDSZSZ
IE	IALPA		
IT	ANPAC, ANPAV	UNICA	
LT		LATCoA	LPSDPS
LU	NGL-SNEP, ALPL-LCGB	LGATCo	
LV		LADA	
MT	UCC, ALPA	MATCoA	
NL	VNC, VNV, FNV Cabine	VNLG	VPS, VKP, CNV Vakmensen, De Unie
PL	ZZPiL, ZZPK PLL LOT SA, KM NSZZ Solidarność PLL LOT	ZZKRL, ZZKLW	
PT	SPAC, APPLA, SIPLA, SNPAC	SINCTA, SITECSA, SIMA	STHA, SITEMA, SINDAV, SINTAC, SIMA, SQAC
RO	FNSA	ATSR, FSA	
SE	SPF		SEKO, STF, Kommunal
SI		SAITS, SATS, SSKL	SSAL, SAL, SPGAE
SK			IOZ
EU27	42 trade unions in 20 Member States	35 trade unions in 21 Member States	37 trade unions in 16 Member States

Note: Bulgaria is the only Member State without a trade union covering only one subsector.

Source: Network of Eurofound Correspondents, 2020

Table 14: Aviation sector trade unions organising more than one subsector

Member State	Aircrew and ATM staff	Aircrew and ground handling services	ATM and ground handling services	All three subsectors
AT	Vida	Vida	Vida	Vida
BE	BBTK-SETCa, ACLVB, ACV Puls, CNE	BBTK-SETCa, ACLVB, ACV Puls, CNE	BBTK-SETCa, ACLVB, ACV Puls, CNE	BBTK-SETCa, ACLVB, ACV Puls, CNE
BG			FTTUB	
CZ	OOPL, CZALPA, CZATSEA	OOPL, CZALPA, OSD	PV OSD, CZATSEA	
DE	ver.di	ver.di	dbb, ver.di, GdF	ver.di
DK	FPU, DALPA, CUD, DATCoA	FPU, DALPA, CUD, 3F, Dansk Metal	DATCoA, HK Privat, 3F, Dansk Metal	
EE	ETTA	ETTA	ETTA	ETTA
EL			OSYPA, OPAM	
ES	FeSMC-UGT FSC-CCOO, SEPLA, SITCPLA, STAVLA, USCA	FSC-CCOO, FeSMC-UGT, FS-USO, SEPLA, SITCPLA, STAVLA	USCA, FSC-CCOO, FeSMC-UGT, FS-USO	FSC-CCOO, FeSMC-UGT, FS-USO
FI	YTY	PRO	JHL	
FR	FEETS-FO, SNPNC, UNSA Transport, CGT Transports, SNPAC, FGTE-CFDT	FEETS-FO, FNEMA-CFE CGC, UNSA Transport, CGT Transports, FGT CFTC, SPAF, SNPAC, FGTE-CFDT	UNSA Transport, CGT Transports, FGTE-CFDT, CGT Service Public	UNSA Transport, CGT Transports, FGTE-CFDT

Member State	Aircrew and ATM staff	Aircrew and ground handling services	ATM and ground handling services	All three subsectors
HR	SKOZHSP	ORCA	SHSZUZS, SRAZ, NSSZZLD, NSSZLSK	
HU			LESZ	
IE	Forsa	IALPA, Forsa, SIPTU	Forsa	Forsa
IT	FIT-CISL, FILT-CGIL, UIL Trasporti, UGL Trasporto Aereo	FIT-CISL, FILT-CGIL, UIL Trasporti, UGL Trasporto Aereo	FIT-CISL, FILT-CGIL, UIL Trasporti, UGL Trasporto Aereo	FIT-CISL, FILT-CGIL, UIL Trasporti, UGL Trasporto Aereo
LU	SAC-OGBL	SAC-OGBL	SAC-OGBL, LCGB	SAC-OGBL
LV	LAAF	LAA, LAAF	LAAF	LAAF
MT	GWU	GWU	GWU	GWU
NL			FNV Luchtvaart, NVLT, VPS	
PL			KSPTLIOL	
PT			SITAVA	
RO			SNTT	
SE		Unionen		
EU27	36 trade unions in 15 Member States	45 trade unions in 16 Member States	47 trade unions in 22 Member States	21 trade unions in 11 Member States

Note: *There is no overlap in Cyprus, Lithuania, Slovakia or Slovenia.*

Source: *Network of Eurofound Correspondents, 2020*

Among the 72 trade unions organising cabin crew, 17 (24%) only organise cabin crew, 16 (22%) only organise pilots and 39 (54%) organise both pilots and cabin crew. The number of trade unions representing only one of the three professional groups is 31, while 19 trade unions represent two professional groups, and 21 trade unions represent all three – including both pilots and cabin crew.

While 83 trade unions organise ATM staff, only 15 organise ATCOs. This is the largest group of trade unions representing just one specific professional group. There are only four trade unions that organise just ATSEP, and only five that organise just the other ATM employees.

For the 89 ground handling trade unions, the extent of their membership domains varies significantly. There are 13 trade unions covering only one specified ground handling activity, 8 covering two activities, 6 covering three activities, 28 covering four activities, 19 covering five activities and, finally, 14 that cover all six of the specified ground handling activities (see Table 130 in Annex 1).

The number of trade union members relative to the number of employees working in the civil aviation sector (organisational density) is assessed in Tables 15 and 16. They show the membership figures and organisational density of those trade unions in the air transport subsector and the service activities incidental to air transport subsector, respectively, as far as data are available. However, two main problems arise. First, for a few unions it is not completely clear whether the data provided refers to the specific subsector only or to the whole civil aviation sector. While this is not an issue for those trade unions that organise employees in only one subsector, it may lead to confusion in the case of unions representing employees in several segments of the sector or in the entire civil aviation industry. On the other hand, many unions have not provided any membership data. This hampers the assessment of the relative membership strength in terms of the number of members of the trade unions with regard to both the whole civil aviation sector and the subsectors.

Table 15: Membership numbers and organisational density of trade unions in air transport (NACE 51.10 and NACE 51.21), 2020

Member State	Trade union	Members in air transport	% of employees in air transport	Members in civil aviation sector	% of total number of employees in civil aviation sector	Relative importance in air transport
AT	ACA	744	8	744	4	3
AT	Vida	n.a.	n.a.	5,000	29	1
BE	BBTK-SETCa	n.a.	n.a.	n.a.	n.a.	1
BE	ACLVB-CGSLB	n.a.	n.a.	n.a.	n.a.	4
BE	ACV Puls	n.a.	n.a.	n.a.	n.a.	2
BE	ACV-CSC CNE	n.a.	n.a.	n.a.	n.a.	3
BE	BeCA	600	11	600	5	4
BG	none					
CY	none					
CZ	OOPL	220	n.a.	200	n.a.	1
CZ	CZALPA	70	n.a.	70	n.a.	2
DE	ver.di	n.a.	n.a.	n.a.	n.a.	1
DE	VC	10,000	16	10,000	8	3
DE	UFO	n.a.	n.a.	n.a.	n.a.	2
DK	FPU	1,802	22	1,802	11	1 or 2
DK	DALPA	n.a.	n.a.	n.a.	n.a.	1 or 2
DK	CUD	1,193	15	1,193	8	3
EE	ETTA	n.a.	n.a.	>120	n.a.	1
EL	RACU	n.a.	n.a.	n.a.	n.a.	1
ES	SEPLA	6,000 pilots	18	6,000	9	Largest for pilots
ES	FSC-CCOO	n.a.	n.a.	12,405	19	1 or 2
ES	FeSMC-UGT	n.a.	n.a.	12,000	18	1 or 2
ES	FS-USO	n.a.	n.a.	n.a.	n.a.	3 or 4
ES	SITCPLA	n.a. (cabin crew)	n.a.	n.a.	n.a.	3 or 4
ES	STAVLA	1,000	3	1,000	1	6
FI	AKT/SLSY	2,080	32	2,080	19	1
FI	FPA	1,450	24	1,450	13	3
FI	YTY	1,550	26	1,850	17	2
FI	Pro	450	7	750	7	4
FR	FGTE-CFDT	n.a.	n.a.	n.a.	n.a.	1 or 2
FR	FEETS-FO/SNPNC	n.a.	n.a.	9,000	10	1 or 2
FR	FNEMA-CFE CGC	n.a.	n.a.	n.a.	n.a.	
FR	UNSA Transport	n.a.	n.a.	n.a.	n.a.	
FR	CGT Transports	n.a.	n.a.	n.a.	n.a.	
FR	FGT CFTC	n.a.	n.a.	n.a.	n.a.	
FR	SNPL	4,700	7	4,700	5	3
FR	SPAF	n.a.	n.a.	n.a.	n.a.	
FR	ALTER	n.a.	n.a.	n.a.	n.a.	
HR	ORCA	n.a.	n.a.	302	7	1
HR	SKOZ	128	12	128	4	2
HR	HSPP	103	9	103	3	3

Member State	Trade union	Members in air transport	% of employees in air transport	Members in civil aviation sector	% of total number of employees in civil aviation sector	Relative importance in air transport
HU	HUNALPA	80	6	80	2	1
IE	IALPA	1,200	16	1,200	9	2
IE	Forsa	1,700	23	2,300	17	1
IE	SIPTU	100	1	5,350	40	3
IT	FIT-CISL	n.a.	n.a.	6,500	13	1 or 2
IT	FILT-CGIL	n.a.	n.a.	n.a.	n.a.	1 or 2
IT	UIL Trasporti	n.a.	n.a.	n.a.	n.a.	3
IT	UGL Trasporto Aereo	n.a.	n.a.	n.a.	n.a.	3
IT	ANPAC	n.a.	n.a.	n.a.	n.a.	3
IT	ANPAV	n.a.	n.a.	n.a.	n.a.	4
LT	none					
LU	SAC-OGBL	n.a.	n.a.	600	n.a.	2
LU	ALPL-LCGB	700	n.a.	700	n.a.	1
LV	LAA	n.a.	n.a.	345	8	1 or 2
LV	LAAF	n.a.	n.a.	357	8	1 or 2
MT	UCC	250	n.a.	250	n.a.	1
MT	ALPA	100	n.a.	100	n.a.	2
MT	GWU	85	n.a.	1,085	n.a.	3
NL	VNC	6,000	n.a.	6,000	n.a.	1
NL	VNV	5,487	n.a.	5,487	n.a.	2
NL	FNV Cabine	2,000	n.a.	2,000	n.a.	3
PL	ZZPiL	500	12	500	3	1
PT	SPAC	2,000	18	2,000	10	2
PT	APPLA	1,310	12	1,310	7	3
PT	SIPLA	124	1	124	1	4
PT	SNPVAC	4,000	36	4,000	21	1
RO	FNSA	2,000	43	2,000	19	1
SE	Unionen	n.a.	n.a.	3,416	24	1
SE	SPF	1,250	19	1,250	9	2
SI	none					
SK	none					

Notes: n.a., data not available. Names in bold are among the largest trade unions in air transport in the respective country. 1, largest trade union; 2, second-largest trade union; 3, middle-sized trade union; 4, smaller trade union.

Sources: Eurostat, Structural Business Statistics; Network of Eurofound Correspondents, 2020

Table 16: Membership figures and organisational density of trade unions in service activities incidental to air transport (NACE 52.23), 2020

Member State	Trade union	Members in service activities incidental to air transport	% of employees in service activities incidental to air transport	Members in whole civil aviation sector	% of total number of employees in civil aviation sector	Relative importance in service activities incidental to air transport
AT	Vida	n.a.	n.a.	5,000	29	1
AT	GPA-djp	n.a.	n.a.	n.a.	n.a.	2
AT	GPF	n.a.	n.a.	n.a.	n.a.	4

Member State	Trade union	Members in service activities incidental to air transport	% of employees in service activities incidental to air transport	Members in whole civil aviation sector	% of total number of employees in civil aviation sector	Relative importance in service activities incidental to air transport
BE	ABVV-FGTB BTB-UBT	1,594	29	1,597	14	3
BE	BBTK-SETCa	n.a.	n.a.	n.a.	n.a.	3
BE	ACLVB-CGSLB	n.a.	n.a.	n.a.	n.a.	4
BE	ACV-CSC Transcom	n.a.	n.a.	n.a.	n.a.	3
BE	ACV-CSC CNE	n.a.	n.a.	n.a.	n.a.	3
BE	ACV Puls	n.a.	n.a.	n.a.	n.a.	3
BE	BGATCo	260	5	260	2	4
BG	FTTUB	1,421	24	1,421	18	1
BG	FTW-CL Podkrepa	n.a.	n.a.	n.a.	n.a.	
BG	BATCoU	n.a.	n.a.	n.a.	n.a.	
CY	OIYK-SEK	956	44	956	37	1
CY	PASEY-PEO	608	28	608	23	2
CY	CYATCoU	106	5	106	4	3
CY	PASYDY	121	6	121	5	3
CY	SYCHTHEM-DEOK	100	5	100	4	3
CZ	OSD	2,000	34	2,000	n.a.	1
CZ	OSZL	186	3	186	n.a.	3
CZ	CZATCoA	227	4	227	n.a.	2
CZ	PV OSD	n.a.	n.a.	n.a.	n.a.	4
DE	ver.di	n.a.	n.a.	n.a.	n.a.	1
DE	dbb	n.a.	n.a.	n.a.	n.a.	2
DE	GdF	4,300	6	4,300	3	3
DE	TGL/IGL	3,000	4	3,000	2	4
DE	GdP	n.a.	n.a.	n.a.	n.a.	4
DK	HK Privat	2,000	26	2,000	13	2
DK	3F	4,141	54	4,141	26	1
DK	Dansk Metal	200	3	200	1	4
DK	DATCoA	300	4	300	2	4
EE	ETTA	n.a.	n.a.	> 120	n.a.	1
EE	EstATCoA	93	11	93	n.a.	2
EL	EEEEKE	550	8	550	5	
EL	HACU	90	1	90	1	
EL	OSYPA	2,052	32	2,052	20	
EL	OPAM	1,250	19	1,250	12	
ES	FSC-CCOO	n.a.	n.a.	12,405	19	
ES	FeSMC-UGT	n.a.	n.a.	12,000	18	
ES	FS-USO	n.a.	n.a.	n.a.	n.a.	
ES	USCA	2,000	6	2,000	3	
FI	IAU	n.a.	n.a.	n.a.	n.a.	1
FI	Pro	300	6	750	7	4
FI	JHL	595	13	595	6	4
FI	SLJY	210	4	210	2	4
FI	YTY	300	6	1,850	17	4

Member State	Trade union	Members in service activities incidental to air transport	% of employees in service activities incidental to air transport	Members in whole civil aviation sector	% of total number of employees in civil aviation sector	Relative importance in service activities incidental to air transport
FR	SNCTA	1,200	5	1,200	1	4
FR	USAC	n.a.	n.a.	n.a.	n.a.	
FR	FGTE-CFDT	n.a.	n.a.	n.a.	n.a.	
FR	UNSA Transport	n.a.	n.a.	n.a.	n.a.	
FR	CGT Transports	n.a.	n.a.	n.a.	n.a.	
FR	CGT Commerce	n.a.	n.a.	n.a.	n.a.	
FR	CGT Ports et Docks	n.a.	n.a.	n.a.	n.a.	
FR	CGT Service Public	n.a.	n.a.	n.a.	n.a.	
FR	FGT CFTC	n.a.	n.a.	n.a.	n.a.	4
FR	FNEMA-CFE CGC	n.a.	n.a.	n.a.	n.a.	
FR	SUD Aérien	n.a.	n.a.	n.a.	n.a.	
FR	FEETS-FO	n.a.	n.a.	9,000	10	
HR	SHSZUZ	320	11	320	8	
HR	ORCA	n.a.	n.a.	302	7	
HR	SZTH	85	3	85	2	
HR	SSDUZ	100	3	100	2	
HR	CATCoU	260	9	260	6	
HR	SDHKZP	30	1	30	1	
HR	SRAZ	180	6	180	4	
HR	NSSZZLD	160	5	160	4	
HR	NSSZLSK	130	4	130	3	
HU	RDSZSZ	235	6	235	5	
HU	RMFSz	1,500	41	1,500	30	1
HU	LESZ	650–700	18	650–700	13	2
HU	LIGOSZ	n.a.	n.a.	n.a.	n.a.	4
HU	IDFSZ	110	3	110	2	3
HU	Control MLISZ	182	5	182	4	3
IE	SIPTU	5,250	89	5,350	40	1
IE	Forsa	600	10	2,300	17	2
IT	FIT-CISL	n.a.	n.a.	6,500	13	1 or 2
IT	FILT-CGIL	n.a.	n.a.	n.a.	n.a.	1 or 2
IT	UIL Trasporti	n.a.	n.a.	n.a.	n.a.	4
IT	UGL Trasporto Aereo	n.a.	n.a.	n.a.	n.a.	3
IT	Unica	1,050	4	1,050	2	4
LT	LPSDPS	30	2	30	1	2
LT	LATCoA	80	5	80	4	1
LU	SAC-OGBL	n.a.	n.a.	600	n.a.	2
LU	LCGB	700	n.a.	700	n.a.	1
LU	LGATCo	32	n.a.	32	n.a.	4
LV	LAA	n.a.	n.a.	345	8	1 or 2
LV	LAAF	n.a.	n.a.	357	8	1 or 2
LV	LADA	134	6	134	3	3
MT	GWU	1,000	n.a.	1,085	n.a.	1

Member State	Trade union	Members in service activities incidental to air transport	% of employees in service activities incidental to air transport	Members in whole civil aviation sector	% of total number of employees in civil aviation sector	Relative importance in service activities incidental to air transport
MT	MATCoA	n.a.	n.a.	n.a.	n.a.	
MT	UHM	n.a.	n.a.	n.a.	n.a.	3
NL	FNV Luchtvaart	3,500	49	3,500	n.a.	1
NL	CNV Vakmensen	1,000	14	1,000	n.a.	2
NL	De Unie	n.a.	n.a.	n.a.	n.a.	3
NL	VKP	n.a.	n.a.	n.a.	n.a.	3
NL	VNLG	350	5	350	n.a.	3
NL	VPS	650	9	650	n.a.	3
NL	NVLT	750	11	750	n.a.	3
PL	ZZKRL	n.a.	n.a.	n.a.	n.a.	1
PL	KSPTLiOL	1,435	12	1,435	9	2
PL	ZZKLW	n.a.	n.a.	n.a.	n.a.	4
PL	ZZNPL	n.a.	n.a.	n.a.	n.a.	4
PT	SITAVA	4,113	52	4,113	22	1
PT	STHA	n.a.	n.a.	n.a.	n.a.	3
PT	SINCTA	361	5	361	2	3
PT	SITECSA	100	1	100	1	4
PT	SIMA	n.a.	n.a.	n.a.	n.a.	4
PT	SINTAC	1,300	17	1,300	7	3
PT	SQAC	n.a.	n.a.	n.a.	n.a.	4
PT	SINDAV	n.a.	n.a.	n.a.	n.a.	3
PT	SITEMA	1,500	19	1,500	8	3
RO	ATSR	1,394	24	1,394	13	1
RO	FSA	638	11	638	6	2
RO	SNTT	300	5	300	3	3
SE	Unionen	n.a.	n.a.	3,416	24	1
SE	SEKO	900	12	900	6	3
SE	STF	1,400	18	1,400	10	2
SE	ST	1,000	13	1,000	7	3
SE	Kommunal	19	0	19	0	4
SI	SSAL	70	9	70	9	3
SI	SAL	120	15	120	15	1
SI	SPGAE	50	6	50	6	4
SI	SAITS	19	2	19	2	4
SI	SATS	32	4	32	4	4
SI	SSKL	110	13	110	13	2
SK	IOZ	640	42	640	30	1
SK	MOZRLP SR	n.a.	n.a.	n.a.	n.a.	2

Notes: n.a., data not available. Names in bold are among the largest in air transport in the respective country. 1, largest trade union; 2, second-largest trade union; 3, middle-sized trade union; 4, smaller trade union.

Source: Eurostat, Structural Business Statistics; Network of Eurofound correspondents, 2020

2.2. Involvement of trade unions in collective bargaining and social dialogue in the civil aviation sector

In the previous section, the sector-relatedness and membership density of trade unions was considered, while in this section their involvement in collective bargaining, consultation procedures and social dialogue bodies is analysed. Table 17 shows whether trade unions related to the air transport subsector are involved in sector-related collective bargaining. This table also indicates whether they are consulted by authorities in sector-related matters and/or participate in bipartite or tripartite social dialogue affecting the sector.

Table 17: Involvement of civil aviation sector trade unions in collective bargaining, consultation procedures and social dialogue, 2020

Member State	Trade union	Collective bargaining involvement													Consultation	Social dialogue body		Type of organisation	Representative organisation	National affiliation	European affiliation
		Pilots NACE 51.10	Pilots NACE 51.21	Cabin crew	ATC	ATSEP	Other ATM	Baggage handling	Ticket desk/check-in	Airport security	Aircraft maintenance/overhaul	Airport fire services	Services such as fuel, catering, de-icing	Air transport activities (NACE 51.10 + 51.21)		Bipartite	Tripartite				
AT	ACA	no	no	no	no	no	no	no	no	no	no	no	no	no	yes	no	yes	PA	no	no	ECA
AT	Vida	yes	yes	yes	yes	yes	yes	yes	no	yes	yes	yes	yes	yes	yes	no	yes	TU	MR + LC	ÖGB	ETF
AT	GPA-djp	no	no	no	no	no	no	no	yes	no	no	no	no	no	n.a.	n.a.	n.a.	TU	MR + LC	ÖGB	no
AT	GPF	no	no	no	yes	yes	yes	no	no	no	no	no	no	no	no	no	no	TU	MR + LC	ÖGB	ETF
BE	ABVV-FGTB BTB-UBT	no	no	no	no	no	no	yes	no	yes	yes	yes	yes	no	yes	yes	no	TU	LC	ABVV-FGTB	ETF
BE	BBTK-SETCa	yes	yes	yes	yes	yes	yes	no	yes	yes	yes	yes	yes	yes	yes	yes	no	TU	LC	ABVV-FGTB	ETF
BE	ACLVB-CGSLB	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	n.a.	TU	LC	ACLVB-CGSLB	ETF
BE	ACV-CSC Transcom	no	no	no	no	no	no	yes	no	yes	yes	yes	yes	no	yes	yes	no	TU	LC	ACV-CSC	ETF, ATCEUC
BE	ACV-CSC CNE	yes	yes	yes	yes	yes	yes	no	yes	yes	yes	yes	yes	yes	yes	yes	no	TU	LC	ACV-CSC	no
BE	ACV Puls	yes	yes	yes	yes	yes	yes	no	yes	yes	yes	yes	yes	yes	yes	yes	no	TU	LC	ACV-CSC	ETF
BE	BGATCo	no	no	no	no	no	no	no	no	no	no	no	no	no	no	no	no	GUI	no	no	ATCEUC
BE	BeCA	no	no	no	no	no	no	no	no	no	no	no	no	no	no	no	no	PA	no	no	ECA
BG	FTTUB	no	no	no	yes	yes	yes	yes	yes	yes	yes	yes	yes	no	n.a.	yes	yes	TU	LC	CITUB	ETF
BG	FTW-CL Podkrepa	no	no	no	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	no	n.a.	n.a.	n.a.	n.a.	n.a.	Podkrepa	ETF
BG	BATCoU	no	no	no	yes	yes	yes	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	no	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	ATCEUC
CY	OIYK-SEK	no	no	no	no	no	no	yes	yes	no	yes	no	yes	no	no	yes	no	TU	no	SEK	no
CY	PASEY-PEO	no	no	no	no	no	no	yes	yes	no	yes	no	yes	no	no	yes	no	TU	no	PEO	no
CY	CYATCoU	no	no	no	yes	no	yes	no	no	no	no	no	no	no	yes	yes	no	TU	yes	no	ATCEUC
CY	PASYDY	no	no	no	yes	no	yes	no	no	no	no	no	no	no	yes	yes	no	TU	yes	no	no
CY	SYCHTHEM-DEOK	no	no	no	no	no	no	yes	yes	no	yes	no	yes	no	no	yes	no	TU	MR	DEOK	no
CZ	OOPL	yes	no	yes	no	no	no	no	no	no	no	no	no	yes	no	no	no	TU	MR	no	no
CZ	CZALPA	yes	no	no	no	no	no	no	no	no	no	no	no	yes	no	no	no	TU	MR + LC	no	ECA
CZ	OSD	no	no	no	no	yes	no	yes	yes	yes	no	yes	no	no	yes	no	yes	TU	MR	CMKOS	ETF

Member State	Trade union	Collective bargaining involvement													Consultation	Social dialogue body		Type of organisation	Representative organisation	National affiliation	European affiliation
		Pilots NACE 51.10	Pilots NACE 51.21	Cabin crew	ATC	ATSEP	Other ATM	Baggage handling	Ticket desk/check-in	Airport security	Aircraft maintenance/overhaul	Airport fire services	Services such as fuel, catering, de-icing	Air transport activities (NACE 51.10 + 51.21)		Bipartite	Tripartite				
CZ	OSZL	no	no	no	no	no	no	no	yes	no	yes	no	yes	no	no	no	no	TU	MR	CMKOS	no
CZ	CZATCoA	no	no	no	yes	no	yes	no	no	no	no	no	no	no	no	no	no	TU	MR	no	ETF
CZ	PV OSD	no	no	no	no	no	yes	no	no	no	no	no	no	no	no	no	no	TU	MR	(CMKOS)	(ETF)
DE	ver.di	yes	yes	yes	no	no	no	yes	yes	yes	yes	yes	yes	yes	yes	no	yes	TU	MR	DGB	ETF
DE	VC	yes	yes	no	no	no	no	no	no	no	no	no	no	yes	yes	no	no	TU	MR	no	ECA
DE	UFO	no	no	yes	no	no	no	no	no	no	no	no	no	yes	no	no	no	TU	MR	no	EurECCA
DE	dbb	no	no	no	no	no	no	yes	no	yes	no	no	no	yes	no	yes	TU	MR	dbb	no	
DE	GdF	no	no	no	yes	yes	yes	no	no	no	no	no	yes	no	yes	no	no	TU	MR	no	ATCEUC
DE	TGL/IGL	no	no	no	no	no	no	no	no	no	yes	no	no	no	no	no	no	TU	n.a.	no	no
DE	GdP	no	no	no	no	no	no	no	yes	no	no	no	no	yes	no	yes	TU	MR	DGB	no	
DK	FPU	yes	yes	yes	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	yes	no	yes	TU	MR	FH	ETF
DK	DALPA	yes	no	no	no	no	no	no	no	no	no	no	no	yes	yes	no	yes	TU	MR	no	ECA
DK	CUD	no	no	no	no	no	no	no	no	no	no	no	no	yes	no	yes	TU	MR	FH	ETF	
DK	HK Privat	no	no	no	no	no	yes	no	yes	yes	no	no	no	no	yes	no	no	TU	MR	FH	ETF
DK	3F	no	no	no	no	no	no	yes	no	yes	no	yes	yes	no	yes	no	yes	TU	MR	FH	ETF
DK	Dansk Metal	no	no	no	no	no	no	no	no	no	n.a.	no	no	yes	no	yes	TU	MR	FH	ETF	
DK	DATCoA	no	no	no	yes	yes	yes	no	no	no	no	no	no	no	yes	no	no	TU	MR	FH	ATCEUC
EE	ETTA	no	no	no	no	no	no	no	no	no	yes	no	no	no	no	no	no	TU	n.a.	EAKL	ETF
EE	EstATCoA	no	no	no	yes	no	no	no	no	no	no	no	no	no	no	no	no	TU	n.a.	(EAKL)	ETF
EL	RACU	no	no	no	no	no	no	no	no	no	no	no	no	no	no	no	no	TU	MR	GSEE	EurECCA
EL	EEEEKE	no	no	no	no	no	no	no	no	no	no	no	no	no	yes	yes	no	TU	n.a.	n.a.	ATCEUC
EL	HACU	no	no	no	no	no	no	no	no	no	no	no	no	no	yes	yes	no	TU	n.a.	no	ATCEUC
EL	OSYPA	no	no	no	no	no	no	no	no	no	no	no	no	no	yes	yes	no	TU	LC	ADEDY	ETF
EL	OPAM	no	no	no	no	no	yes	yes	yes	yes	yes	yes	yes	no	no	yes	yes	TU	LC	GSEE	no
ES	SEPLA	yes	yes	no	no	no	no	no	no	no	no	no	no	yes	no	no	no	TU	LC	no	ECA
ES	SITCPLA	no	no	yes	no	no	no	no	no	no	no	no	no	yes	no	no	no	TU	LC	no	ETF
ES	STAVLA	no	no	yes	no	no	no	no	no	no	no	no	no	yes	no	no	no	TU	LC	no	EurECCA
ES	FSC-CCOO	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	no	no	yes	no	yes	no	TU	LC	CCOO	ETF
ES	FeSMC-UGT	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	no	no	yes	no	yes	no	TU	LC	UGT	ETF

Member State	Trade union	Collective bargaining involvement													Consultation	Social dialogue body		Type of organisation	Representative organisation	National affiliation	European affiliation
		Pilots NACE 51.10	Pilots NACE 51.21	Cabin crew	ATC	ATSEP	Other ATM	Baggage handling	Ticket desk/check-in	Airport security	Aircraft maintenance/overhaul	Airport fire services	Services such as fuel, catering, de-icing	Air transport activities (NACE 51.10 + 51.21)		Bipartite	Tripartite				
ES	FS-USO	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	no	no	yes	no	yes	no	TU	LC	USO	ETF
ES	USCA	no	no	no	yes	no	no	no	no	no	no	no	no	no	no	no	no	TU	LC	no	ATCEUC
FI	AKT/SLSY	no	no	yes	no	no	no	no	no	no	no	no	no	yes	yes	yes	no	TU	MR	SAK	ETF
FI	FPA	(yes)	no	no	no	no	no	no	no	no	no	no	no	yes	yes	no	no	TU	MR	Akava	ECA
FI	IAU	no	no	no	no	no	no	yes	yes	yes	yes	no	yes	no	yes	yes	n.a.	TU	MR	SAK	ETF
FI	Pro	no	no	yes	no	no	no	yes	no	no	yes	no	no	yes	yes	yes	no	TU	MR	STTK	ETF
FI	JHL	no	no	no	no	no	no	yes	yes	yes	no	yes	yes	no	yes	no	no	TU	MR	SAK	ETF
FI	SLJY	no	no	no	yes	no	no	no	no	no	no	no	no	no	yes	no	no	TU	MR	Akava	ETF, ATCEUC
FI	YTY		no	no	no	no	no	no	no	no	no	no	no	yes	yes	no	no	TU	MR	Akava	ECA
FR	SNPL	yes	yes	yes	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	yes	yes	yes	TU	LC	no	ECA
FR	SPAF	yes	no	no	no	no	no	no	no	no	no	no	no	yes	no	no	no	TU	n.a.	no	no
FR	ALTER	yes	no	no	no	no	no	no	no	no	no	no	no	yes	no	no	no	TU	n.a.	no	no
FR	SNCTA	no	no	no	yes	yes	yes	no	no	no	no	no	no	no	yes	yes	no	TU	LC	no	ATCEUC
FR	USAC	no	no	no	yes	yes	yes	no	no	no	no	no	no	no	yes	yes	no	TU	LC	CGT	(ETF)
FR	FGTE-CFDT	yes	yes	yes	yes	yes	yes	yes	yes	no	yes	yes	yes	yes	yes	yes	yes	TU	LC	CFDT	ETF
FR	UNSA Transport	no	no	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	TU	LC	UNSA	ETF
FR	CGT Transports	yes	no	yes	no	yes	yes	yes	yes	no	yes	yes	yes	yes	yes	yes	no	TU	LC	CGT	ETF
FR	CGT Commerce	no	no	no	no	no	no	no	yes	yes	no	no	yes	no	yes	yes	no	TU	LC	CGT	no
FR	CGT Ports et Docks	no	no	no	no	no	no	yes	yes	no	yes	no	yes	no	no	yes	no	TU	LC	CGT	no
FR	CGT Service Public	no	no	no	no	yes	yes	yes	yes	no	yes	yes	yes	no	yes	yes	no	TU	LC	CGT	ETF
FR	FGT CFTC	no	no	n.a.	no	no	no	yes	yes	no	no	no	no	n.a.	no	no	no	TU	LC	CFTC	(ETF)
FR	FNEMA-CFE CGC	no	no	yes	no	no	no	yes	yes	no	yes	no	yes	yes	yes	yes	no	TU	LC	CFE-CGC	no
FR	SUD Aérien	no	no	no	no	no	no	yes	yes	yes	yes	yes	yes	no	yes	yes	no	TU	LC	no	no
FR	FEETS-FO (part of SNPNC FO)	yes	yes	yes	no	no	no	yes	yes	no	yes	no	yes	yes	yes	yes	yes	TU	LC	FO	ETF
HR	SHSZUZ	no	no	no	no	no	yes	yes	yes	no	yes	no	yes	no	no	yes	no	TU	LC	URSH	no
HR	SKOZ	yes	no	yes	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	yes	yes	no	TU	LC	HUS	(ETF)
HR	HSPP	yes	no	yes	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	no	no	no	TU	LC	ITUC	(ECA)
HR	ORCA	yes	no	yes	no	no	no	no	no	no	yes	no	no	yes	yes	yes	no	TU	LC	HUS	no

Member State	Trade union	Collective bargaining involvement													Consultation	Social dialogue body		Type of organisation	Representative organisation	National affiliation	European affiliation
		Pilots NACE 51.10	Pilots NACE 51.21	Cabin crew	ATC	ATSEP	Other ATM	Baggage handling	Ticket desk/check-in	Airport security	Aircraft maintenance/overhaul	Airport fire services	Services such as fuel, catering, de-icing	Air transport activities (NACE 51.10 + 51.21)		Bipartite	Tripartite				
HR	SZTH	no	no	no	no	no	yes	yes	yes	no	yes	no	yes	no	no	yes	no	TU	LC	no	no
HR	SSDUZ	no	no	no	no	no	no	no	no	no	yes	no	yes	no	no	yes	no	TU	LC	ITUC	no
HR	CATCoU	no	no	no	yes	yes	no	no	no	no	yes	no	no	no	no	yes	no	TU	LC	ITUC	ATCEUC
HR	SDHKZP	no	no	no	yes	yes	no	no	no	no	yes	no	no	no	no	yes	no	TU	LC	no	no
HR	SRAZ	no	no	no	no	yes	yes	yes	yes	yes	no	no	yes	no	no	yes	no	TU	LC	ITUC	no
HR	NSSZZLD	no	no	no	no	no	yes	yes	yes	yes	no	yes	yes	no	no	no	no	TU	LC	ITUC	no
HR	NSSZLSK	no	no	no	no	no	yes	yes	yes	no	yes	no	yes	no	no	yes	no	TU	LC	ITUC	no
HU	HUNALPA	no	no	no	no	no	no	no	no	no	no	no	no	no	no	no	no	PA	no	MAPLESZ	ECA
HU	RDSZSZ	no	no	no	no	no	no	no	no	no	no	no	no	no	no	no	no	TU	MR + LC	MOSZ	ETF
HU	RMFSz	no	no	no	no	no	no	no	no	no	yes	no	no	no	no	no	yes	TU	MR + LC	LIGA	ETF
HU	LESZ	no	no	no	no	no	no	no	no	no	no	no	no	no	no	yes	no	TU	MR + LC	no	ETF
HU	LIGOSZ	no	no	no	no	no	yes	no	no	no	no	no	no	no	no	yes	no	TU	no	no	no
HU	IDFSZ	no	no	no	no	yes	no	no	no	no	no	no	no	no	no	yes	no	TU	MR	no	no
HU	Control MLISZ	no	no	no	yes	no	no	no	no	no	no	no	no	no	no	no	no	TU	LC	no	ETF
IE	IALPA	yes	yes	no	no	no	no	no	no	no	no	no	no	yes	no	no	no	TU	MR	ICTU	ECA
IE	SIPTU	no	no	no	no	no	no	yes	yes	yes	yes	yes	yes	yes	no	no	no	TU	MR	ICTU	ETF
IE	Forsa	no	no	yes	yes	yes	yes	no	no	no	no	no	no	yes	no	no	no	TU	MR	ICTU	ETF, ATCEUC
IT	FIT-CISL	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	no	no	TU	MR	CISL	ETF
IT	FILT-CGIL	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	no	no	TU	MR	CGIL	ETF
IT	UIL Trasporti	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	no	no	TU	MR	UIL	ETF
IT	ANPAC	yes	yes	yes	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	yes	no	no	PA	MR	no	ECA, EurECCA
IT	ANPAV	yes	yes	yes	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	yes	no	no	PA	MR	ORSA	no
IT	UGL Trasporto Aereo	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	no	no	TU	MR	UGL	no
IT	Unica	no	no	no	yes	yes	yes	no	no	no	no	no	no	no	yes	no	no	TU + PA	MR	Fast Confsal	ATCEUC

Member State	Trade union	Collective bargaining involvement													Consultation	Social dialogue body		Type of organisation	Representative organisation	National affiliation	European affiliation	
		Pilots NACE 51.10	Pilots NACE 51.21	Cabin crew	ATC	ATSEP	Other ATM	Baggage handling	Ticket desk/check-in	Airport security	Aircraft maintenance/overhaul	Airport fire services	Services such as fuel, catering, de-icing	Air transport activities (NACE 51.10 + 51.21)		Bipartite	Tripartite					
LT	LPSDPS	no	no	no	no	no	no	no	no	yes	no	no	no	no	yes	no	no	TU	MR	LPSK	no	
LT	LATCoA	no	no	no	yes	no	yes	no	no	no	no	no	no	no	yes	no	no	TU	MR	LPSK	ATCEUC	
LU	SAC-OGBL	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	no	no	TU	LC	OGBL	ETF	
LU	LCGB (ALPL)	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	no	no	TU	LC	LCGB	ETF, ECA	
LU	LGATCo	no	no	no	no	no	no	no	no	no	no	no	no	no	yes	no	no	GUI	MR	OGBL	ATCEUC	
LV	LAA	yes	no	yes	no	no	no	no	yes	no	no	no	no	yes	no	no	no	TU	MR	no	ECA	
LV	LAAF	yes	no	yes	yes	no	no	yes	yes	yes	yes	no	yes	yes	yes	no	no	TU	LC	LBAS	no	
LV	LADA	no	no	no	yes	yes	yes	no	no	no	no	no	no	no	no	no	no	TU	no	no	no	
MT	GWU	no	no	yes	no	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	no	no	TU	LC	no	ETF	
MT	UCC	no	no	yes	no	no	no	no	no	no	no	no	no	yes	yes	no	no	TU	MR	no	ETF	
MT	ALPA	yes	no	no	no	no	no	no	no	no	no	no	no	yes	yes	no	no	TU	MR	no	ECA	
MT	MATCoA	no	no	no	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	ATCEUC
MT	UHM	no	no	no	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	no	no	TU	LC	CMTU	no	
NL	VNC	no	no	yes	no	no	no	no	no	no	no	no	no	yes	yes	yes	no	TU	MR	no	EurECCA	
NL	VNV	yes	yes	no	no	no	no	no	no	no	no	no	no	yes	yes	yes	no	TU	MR	no	ECA	
NL	FNV Cabine	no	no	no	no	no	no	no	no	no	no	no	no	no	yes	yes	no	TU	MR	FNV	ETF	
NL	FNV Luchtvaart	no	no	no	no	no	yes	yes	yes	no	no	no	yes	no	yes	yes	yes	TU	MR	FNV	ETF	
NL	CNV Vakmensen	no	no	no	no	no	no	yes	yes	yes	yes	no	yes	no	yes	yes	yes	TU	MR	CNV	ETF	
NL	De Unie	no	no	no	no	no	no	yes	yes	yes	no	no	yes	no	n.a.	yes	n.a.	TU	MR	no	no	
NL	VKP	no	no	no	no	no	no	yes	yes	no	yes	no	yes	no	n.a.	yes	n.a.	TU	MR	VCP	no	
NL	VNLG	no	no	no	yes	no	no	no	no	no	no	no	no	no	no	yes	no	TU + GUI	MR	CMHP	ATCEUC	
NL	VPS	no	no	no	no	no	no	yes	no	yes	no	yes	no	no	no	yes	no	TU	MR	CMHF	no	
NL	NVLT	no	no	no	no	yes	no	no	no	no	yes	no	yes	no	yes	yes	no	TU	MR	no	no	
PL	ZZPPiL	no	no	no	no	no	no	no	no	no	no	no	no	no	yes	no	yes	TU	LC	OPZZ	ETF	
PL	ZZKRL	no	no	no	yes	no	no	no	no	no	no	no	no	no	yes	no	yes	TU	LC	no	ATCEUC	
PL	KSPTLIOL	no	no	no	no	no	no	yes	yes	no	yes	yes	no	no	yes	no	yes	TU	LC	NSZZ Solidarność	ETF	
PL	ZZKLW	no	no	no	yes	no	no	no	no	no	no	no	no	no	n.a.	no	n.a.	TU	n.a.	no	no	
PL	ZZNPL	no	no	no	no	no	no	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	no	n.a.	no	n.a.	TU	n.a.	no	no	

Member State	Trade union	Collective bargaining involvement													Consultation	Social dialogue body		Type of organisation	Representative organisation	National affiliation	European affiliation
		Pilots NACE 51.10	Pilots NACE 51.21	Cabin crew	ATC	ATSEP	Other ATM	Baggage handling	Ticket desk/check-in	Airport security	Aircraft maintenance/overhaul	Airport fire services	Services such as fuel, catering, de-icing	Air transport activities (NACE 51.10 + 51.21)		Bipartite	Tripartite				
PT	SPAC	yes	yes	no	no	no	no	no	no	no	no	no	no	yes	n.a.	n.a.	n.a.	TU	MR	no	no
PT	APPLA	no	no	no	no	no	no	no	no	no	no	no	no	no	n.a.	n.a.	n.a.	PA	no	no	ECA
PT	SIPLA	yes	no	no	no	no	no	no	no	no	no	no	no	yes	no	no	no	TU	MR	no	no
PT	SNPVAC	no	no	yes	no	no	no	no	no	no	no	no	no	yes	no	no	no	TU	MR	no	EurECCA
PT	SITAVA	no	no	no	yes	yes	yes	yes	yes	no	yes	no	yes	no	yes	no	no	TU	MR	CGTP	ETF
PT	STHA	no	no	no	no	no	no	yes	yes	no	yes	no	yes	no	yes	no	no	TU	MR	no	no
PT	SINCTA	no	no	no	yes	no	yes	no	no	no	no	no	no	no	no	no	no	TU	MR	no	ATCEUC
PT	SITECSA	no	no	no	yes	no	yes	no	no	no	no	no	no	no	no	no	no	TU	MR	no	no
PT	SIMA	no	no	no	no	no	yes	no	no	no	yes	no	no	no	no	no	no	TU	MR	no	no
PT	SINTAC	no	no	no	no	no	yes	yes	yes	no	yes	no	yes	no	no	no	no	TU	MR	no	no
PT	SQAC	no	no	no	no	no	yes	yes	yes	no	yes	no	yes	no	no	no	no	TU	MR	UGT	no
PT	SINDAV	no	no	no	no	no	no	yes	yes	no	yes	no	yes	no	no	no	no	TU	MR	UGT	no
PT	SITEMA	no	no	no	no	no	no	no	no	no	yes	no	no	no	no	no	no	TU	MR	UGT	no
RO	FNSA	yes	no	yes	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	yes	no	no	TU	LC	CNS Cartel Alfa	no
RO	ATSR				yes	yes	yes	no	no	no	no	no	no	no	yes	no	no	TU	LC	no	ATCEUC
RO	FSA	n.a.	n.a.	n.a.	yes	yes	yes	no	no	no	no	no	no	no	n.a.	no	no	TU	LC	CNS Meridian	no
RO	SNTT	n.a.	n.a.	n.a.	no	no	no	yes	yes	yes	yes	yes	yes	no	no	no	no	TU	no	BNS	ETF
SE	Unionen	no	no	yes	no	no	no	yes	yes	yes	yes	no	yes	yes	yes	yes	yes	TU	MR	TCO	ETF
SE	SPF	yes	yes	no	no	no	no	no	no	no	no	no	no	yes	yes	yes	no	TU	MR	no	ETF
SE	SEKO	no	no	no	no	no	no	yes	no	yes	yes	no	yes	no	yes	no	no	TU	MR	LO	ETF
SE	STF	no	no	no	no	no	no	yes	no	yes	yes	yes	yes	no	yes	no	no	TU	MR	LO	ETF
SE	ST	no	no	no	yes	yes	yes	no	yes	no	no	no	no	no	yes	no	no	TU	MR	TCO	ETF
SE	Kommunal	no	no	no	no	no	no	no	no	no	no	yes	no	no	no	no	no	TU	MR	LO	no
SI	SSAL	no	no	no	no	no	no	yes	yes	no	no	yes	yes	no	no	no	no	TU	LC	no	no
SI	SAL	no	no	no	no	no	no	yes	yes	no	no	yes	yes	no	no	no	no	TU	LC	KS-90	no
SI	SPGAE	no	no	no	no	no	no	yes	yes	no	no	yes	yes	no	no	no	no	TU	LC	ZSSS	no
SI	SAITS	no	no	no	yes	yes	yes	no	no	no	no	no	no	no	no	no	no	TU	LC	no	no
SI	SATS	no	no	no	yes	yes	yes	no	no	no	no	no	no	no	no	no	no	TU	LC	KS-90	no
SI	SSKL	no	no	no	yes	yes	yes	no	no	no	no	no	no	no	no	no	no	TU	LC	no	ATCEUC

Member State	Trade union	Collective bargaining involvement													Consultation	Social dialogue body		Type of organisation	Representative organisation	National affiliation	European affiliation
		Pilots NACE 51.10	Pilots NACE 51.21	Cabin crew	ATC	ATSEP	Other ATM	Baggage handling	Ticket desk/check-in	Airport security	Aircraft maintenance/overhaul	Airport fire services	Services such as fuel, catering, de-icing	Air transport activities (NACE 51.10 + 51.21)		Bipartite	Tripartite				
SK	IOZ	no	no	no	no	no	no	yes	yes	yes	yes	yes	yes	no	yes	no	yes	TU	LC	KOZ SR	no
SK	MOZRLP SR	no	no	no	yes	n.a.	n.a.	no	no	no	no	no	no	no	n.a.	n.a.	n.a.	TU	n.a.	no	no

Notes: GUI, guild; LC, legal criteria; MR, mutual recognition of social partners; n.a., data not available; PA, professional association; TU, trade union. Affiliations in parentheses mean indirect membership via higher- or lower-order units. Green shading indicates a positive response: dark green for collective bargaining involvement; medium green for involvement in consultation procedures; light green for participation in bipartite/tripartite social dialogue bodies. Yellow shading indicates organisations identified as trade unions rather than as professional associations or guilds. Blue shading indicates representative organisations according to national law. Names in bold are affiliated to at least one of the European organisations: ETF, ECA, EurECCA and ATCEUC. Trade unions involved only in collective bargaining on behalf of pilots or cabin crew, but not of employees in ATM or ground services, are not included in this table.

Source: Network of Eurofound Correspondents, 2020

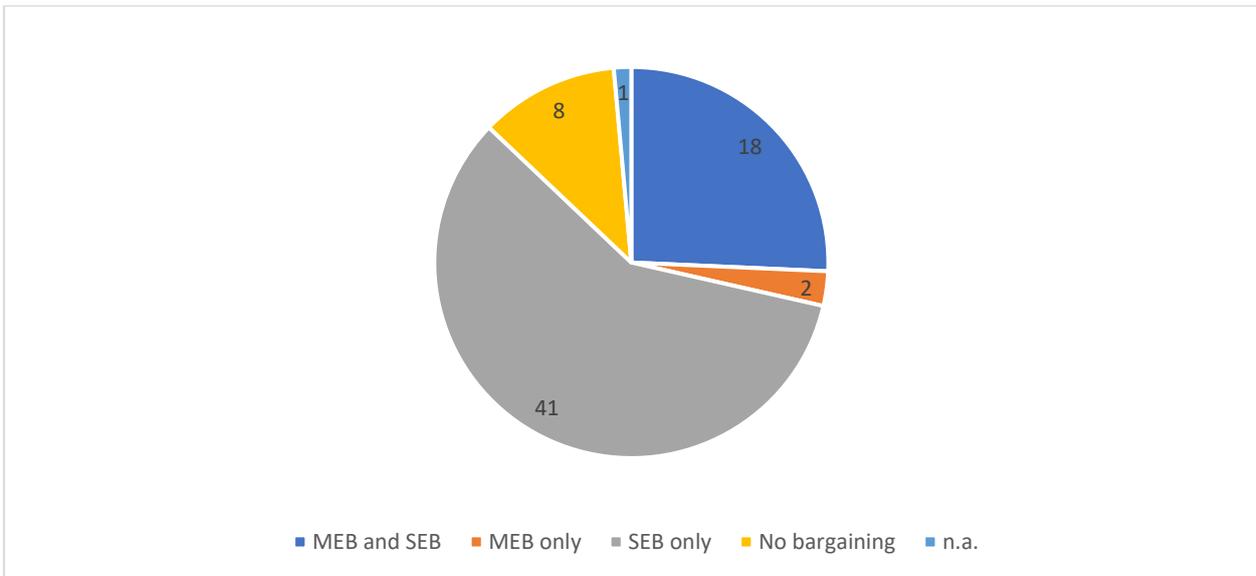
At least one trade union in every Member States represents employees in the ATM and ground service sub sector. As Table 17 indicates, eight unions in four Member States (YTY of Finland, EEKE, RACU, HACU and OSYPA of Greece, RDSZSZ and LESZ of Hungary, and LGATCo of Luxembourg) can be identified that are not at all involved in collective bargaining related to this subsector. However, in all four countries, at least one other trade union concludes collective agreements covering workers of this subsector. For five trade unions in four Member States (FTW-CL Podkrepa of Bulgaria, Dansk Metal of Denmark, MATCoA and UHM of Malta, and ZZNPL of Poland), sufficient information has not been provided to allow an assessment of whether employees of part of or the entire subsector are covered by collective bargaining involving these trade unions. Collective bargaining on behalf of all categories of workers and occupations in the service activities incidental to the air transport subsector is conducted by nine trade unions in five countries, which is only a small proportion of all 132 trade unions representing workers in the subsector, and fewer than the corresponding 21 trade unions in the air transport activities subsector. However, given the heterogeneity of business activities included in NACE 52.23, in particular compared with the air transport subsector, the small number of trade unions (with wide-ranging membership representation with regard to the subsector) concluding collective agreements for all categories of employees and occupations in this subsector should not come as a surprise.

In line with this, most trade unions (110 of 132) engage in collective bargaining on behalf of only some of the workers/occupations of the subsector. All 27 countries under consideration except Luxembourg have at least one trade union that engages in this form of sectional collective bargaining. Again, this is due to the predominance of trade unions' membership representation as sectional or sectionally overlapping with regard to the ATM and ground service activities subsector. Thirty-two trade unions in 15 countries that are involved in collective bargaining related to the air transport activities subsector. Moreover, 67 trade unions in 21 countries are consulted by authorities in order to regulate the sector, whereas 62 unions in 17 countries participate in bipartite or tripartite social dialogue structures dealing with sector-specific matters.

Figures 12 (air transport) and 13 (ATM and ground handling) show how trade unions are involved in collective bargaining. They indicate that a clear majority of trade unions are involved in single-employer collective bargaining in both subsectors, either as the only form of bargaining or in tandem with multi-employer bargaining. Relatively few trade unions engage in multi-employer collective bargaining only. This tendency is even more pronounced in the air transport activities subsector, where collective agreements – if they exist – are usually concluded at company/airline level rather than sector level, due to the lack of (encompassing) employer organisations in this subsector in most countries.

Strikingly, bargaining practices in the civil aviation sector frequently differ from general industrial relations practices in the Member States. For instance, in the overall economy, the Nordic countries, along with several central, southern and western European countries, are characterised by multi-employer bargaining arrangements. In civil aviation, however, trade unions in many of these countries tend to be involved exclusively or mostly in single-employer collective bargaining rather than multi-employer arrangements. This is the case in Austria, Finland, Germany, Greece, Luxembourg, the Netherlands and Portugal. In the Baltic states and a number of central and eastern European countries, industrial relations patterns in civil aviation largely correspond to the respective countries' standard pattern, with predominantly or exclusively single-employer bargaining. Eight trade unions in each of the subsectors in Belgium, Denmark, Estonia, Finland, Greece, Hungary, Luxembourg, Poland and Portugal are not involved in any form of collective bargaining targeting employees in the sector.

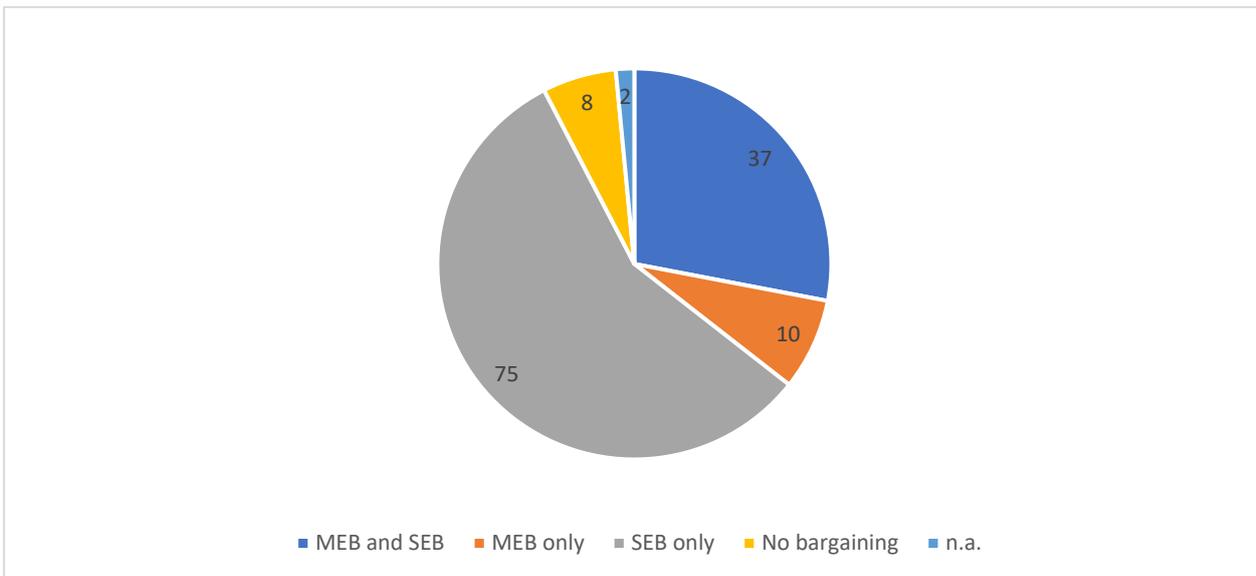
Figure 12: Involvement of trade unions organising pilots and cabin crew in different forms of collective bargaining (number of trade unions), 2020



Notes: N = 70. MEB, multi-employer bargaining; SEB, single-employer bargaining.

Source: Network of Eurofound Correspondents, 2020

Figure 13: Involvement of trade unions organising ATM staff or ground handling employees in different forms of collective bargaining (number of trade unions), 2020



Notes: N = 132. MEB, multi-employer bargaining; SEB, single-employer bargaining.

Source: Network of Eurofound Correspondents, 2020

3. National aviation sector employer organisations

This study has identified 41 employer organisations in the aviation sector. Looking at the different subsectors, the largest group is the 33 employer organisations representing companies providing ground service activities in airports in 18 Member States. There are 16 employer organisations representing companies that employ aircrew in 13 Member States, and 19 employer organisations representing ATM service providers in 12 Member States.

Table 18: Number of employer organisations in the civil aviation sector (in the three subsectors)

Member State	Number of employer organisations/business associations in the civil aviation sector			
	Aircrew	Ground handling activities	ATM activities	Total
AT	1	1		1
BE	2	3		5
BG		1		1
CY				
CZ				
DE	1	4	1	4
DK	1	1	1	1
EE	1	1	1	1
EL		1		1
ES	2	1		3
FI	1	1	1	1
FR	1	4		4
HR				
HU	1	1	1	1
IE				
IT	1	4	4	6
LT				
LU				
LV	1	1	1	1
MT				
NL		1	1	1
PL				
PT	1	2	2	3
RO		1	1	1
SE	2	4	4	5
SI				
SK		1	1	1
EU27	16 employer organisations 13 Member States	33 employer organisations 18 Member States	19 employer organisations 12 Member States	41 employer organisations 18 Member States

Note: Since the same organisation may cover more than just one subsector and thus may be counted multiple times in this table, the aggregate numbers of employer organisations in the civil aviation sector per country may be lower than the sum of all subsector numbers.

Source: Network of Eurofound Correspondents

3.1. Representation, sector-relatedness and organisational density of employer organisations in the civil aviation sector

Table 19 indicates the number of employer organisations organising different groups of employers or types of activities in the aviation sector. Table 20 lists all employer organisations, indicating their representativeness in the aviation sector.

Table 19: Overview of the number of employer organisations organising different areas of the aviation sector

Employees/activities	Number of organisations	Number of Member States	Total number of organisations	% of all aviation employer organisations	Total number of Member States
Pilots for passenger air transport	16	13	16	31	13
Pilots for freight air transport	15	12			
Cabin crew	16	13			
ATC	10	9	12	24	10
ATSEP	12	10			
Other ATM employees	11	9			
Baggage handling	25	16	33	65	18
Ticket desk, check-in and boarding	21	16			
Airport security	19	14			
Aircraft maintenance	23	16			
Airport fire services	13	11			
Services to aircraft, fuelling, catering, de-icing, towing, etc.	28	16			
Total			41	100	18

Note: Full lists of all employer organisations are included in Tables 132, 133 and 134 in Annex 2.

Source: Network of Eurofound Correspondents, 2020

Table 20: Sector representation of employer organisations, 2020

Member State	Employer organisation	Pilots (passenger)	Pilots (freight)	Cabin crew	ATC	ATSEP	Other ATM staff	Baggage handling	Ticket desk, check-in and boarding	Airport security	Aircraft maintenance	Airport fire services	Services to aircraft, fuel, catering, pushbacks
AT	WKÖ-FVALS	yes		yes				yes	yes	yes	yes	yes	yes
BE	BAR	yes	yes	yes									
BE	BATA	yes	yes	yes									
BE	UPTR							yes					
BE	FEBETRA												yes
BE	WF-BE										yes		yes
BG	ASB	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
CY	none												
CZ	none												
DE	AGVL	yes	yes	yes		yes			yes		yes		yes
DE	ABL							yes	yes				yes
DE	VKA	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
DE	BDLS							yes		yes			yes
DK	DI	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes
EE	ELK	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes
EL	AOFA								n.a.	n.a.	n.a.	n.a.	n.a.
ES	ALA	yes	yes	yes									
ES	AECA	yes	yes	yes									
ES	ASEATA							yes	yes	yes	yes		yes
FI	Palta	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes
FR	FNAM	yes	yes	yes				yes			yes		yes
FR	SAMERA							yes					yes
FR	SCARA							yes					yes
FR	UAF							yes	yes	yes	yes	yes	yes
HR	none												
HU	MVVLSz	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes
IE	none												

Member State	Employer organisation	Pilots (passenger)	Pilots (freight)	Cabin crew	ATC	ATSEP	Other ATM staff	Baggage handling	Ticket desk, check-in and boarding	Airport security	Aircraft maintenance	Airport fire services	Services to aircraft, fuel, catering, pushbacks
IT	Assaereo	yes	yes	yes									
IT	Assaeroporti					yes	yes			yes	yes		
IT	Feder catering												yes
IT	Assocontrol				yes	yes	yes						
IT	Assohandlers							yes	yes	yes	yes	yes	yes
IT	FAIRO							yes	yes	yes	yes	yes	yes
LT	none												
LU	none												
LV	LAA	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes
MT	none												
NL	WPBL							yes	yes	yes	yes		yes
PL	none												
PT	APTTA	yes	yes	yes									
PT	AESH							yes	yes		yes		yes
PT	RENA							yes	yes		yes		yes
RO	AAR				yes	yes	yes	yes	yes	yes	yes	yes	yes
SE	Transportföretagen	yes	yes	yes				yes	yes	yes	yes		yes
SE	Svenskt Flyg	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes
SE	Sobona							yes	yes	yes	yes	yes	yes
SE	ALMEGA							yes	yes	yes	yes		yes
SE	SAGE				yes	yes	yes						
SI	none												
SK	UZVCL SR				yes	yes	yes	yes	yes	yes	yes	yes	yes
EU27	41 employer organisations	16	15	16	10	12	11	25	21	19	23	13	28
		16 in 13 Member States			12 in 10 Member States			30 in 16 Member States					

Notes: Green shading indicates that the employers of this professional group or of employees in this sectoral activity are organised by this employers organisation . n.a; means that there is no information available on the parts of the sector covered by this organisation

Source: Network of Eurofound Correspondents, 2020

Table 20 depicts employer organisations' sector-relatedness in terms of business activities/occupations covered. Additional factors specifying sector-relatedness include whether all categories and types of enterprises are represented and whether companies in all regions of a country are represented. Accordingly, a combined consideration of these factors determines whether an employer organisation is categorised as being congruent, overlapping, sectional or sectionally overlapping with regard to the civil aviation sector (for more on membership patterns, see Table 4 and Figure 1 of this report). The distribution of employer organisations in the civil aviation sector among the four categories/patterns of sector-relatedness is presented in Table 21.

Table 21: Membership domain of employer organisations/business associations, 2020

Member State	Congruence	Sectionalism	Overlap	Sectional overlap
AT				<u>WKÖ-FVALS</u>
BE		<i>BAR, BATA</i>		UPTR, FEBETRA, WF-BE
BG		(ASB)		
CY	<i>No employer organisation</i>			
CZ	<i>No employer organisation</i>			
DE		<u>AGVL, ABL</u>		VKA, BDLS
DK			<u>DI</u>	
EE	ELK			
EL		AOFA		
ES		AECA, ASEATA		
FI			<u>Palta</u>	
FR				<u>ENAM, SAMERA, SCARA</u>
HR	<i>No employer organisation</i>			
HU				MVVLSz
IE	<i>No employer organisation</i>			
IT		<i>Assaereo, Assaeroporti, Federcatering, Assocontrol, Assohandlers, FAIRO</i>		
LT	<i>No employer organisation</i>			
LU	<i>No employer organisation</i>			
LV	LAA			
MT	<i>No employer organisation</i>			
NL		WPBL		
PL	<i>No employer organisation</i>			
PT		AESH, RENA		
RO		AAR		
SE				Transportföretagen, Sobona, ALMEGA, SAGE
SI	<i>No employer organisation</i>			
SK	UZvCL SR			

Notes: Employer organisations that are members of ENAA, AIRE, ERA, A4D, CANSO, ACI Europe or ASA are marked in bold. Employer organisations in italics organise companies in air transport activities only. Underlined employer organisations organise companies in both air transport activities and ATM/ground handling activities. Employer organisations neither in italics nor underlined organise companies in ATM/ground handling activities only. Information on ASB (Bulgaria) is unreliable.

Source: Network of Eurofound Correspondents, 2019

Like the civil aviation sector's trade unions, the employer organisations most frequently have either sectional or sectionally overlapping membership domains. Correspondingly, most employer organisations represent only a specific area of the sector in terms of business activity/occupations, type of company or territory. Table 22 indicates that sectionalism usually derives from only partial coverage of civil aviation business activities, which means that employer organisations rarely represent enterprises from air transport, ATM services and ground handling activities simultaneously, but mostly specialise in just one subsector activity. Only three employer organisations could be identified that have a wide membership domain, with affiliated companies in all kinds of activities in the civil aviation sector – two of them being general, cross-sector employer organisations (DI of Denmark and Palta of Finland). The third employer organisation whose membership domain covers the entire civil aviation sector is UZvCL SR in Slovakia (with a congruent membership domain – see Table 21). All other organisations rely on specific interest representation in terms of business activity. By contrast, only relatively few organisations specialise in a particular enterprise category/type of company, and even fewer over only part of a country. Only two organisations (SAMERA and SCARA of France) have sectional membership domain in terms of geographical region.

Table 22: Membership domain of employer organisations in detail, 2020

Member State	Employer organisation	Membership domain pattern ¹³	All civil aviation sector activities covered	All types of enterprises covered	Entire country covered	Members in other sectors
AT	WKÖ-FVALS	SO	no	yes	yes	yes
BE	BAR	S	no	yes	yes	no
BE	BATA	S	no	yes	yes	no
BE	UPTR	SO	no	yes	yes	yes
BE	FEBETRA	SO	no	yes	yes	yes
BE	WF-BE	SO	no	yes	yes	yes
BG	ASB	(S)	no	n.a.	n.a.	(no)
CY	none					
CZ	none					
DE	AGVL	S	no	no	yes	no
DE	ABL	S	no	yes	yes	no
DE	VKA	SO	no	no	yes	yes
DE	BDLS	SO	no	no	yes	yes
DK	DI	O	yes	yes	yes	yes
EE	ELK	(C)	yes	n.a.	yes	no
EL	AOFA	S	no	yes	yes	no
ES	AECA	S	no	yes	yes	no
ES	ASEATA	S	no	yes	yes	no
FI	Palta	O	yes	yes	yes	yes
FR	FNAM	SO	no	yes	yes	yes
FR	SAMERA	SO	no	no	no	yes

¹³ More details on membership domain are available in section 0.3, 'Definitions and methodology'.

Member State	Employer organisation	Membership domain pattern ¹³	All civil aviation sector activities covered	All types of enterprises covered	Entire country covered	Members in other sectors
FR	SCARA	SO	no	no	no	yes
HR	none					
HU	MVVLsz	SO	no	yes	yes	yes
IE	none					
IT	Assaereo	S	no	no	yes	no
IT	Assaeroporti	S	no	no	yes	no
IT	Feder catering	S	no	yes	yes	no
IT	Assocontrol	S	no	no	yes	no
IT	Assohandlers	S	no	yes	yes	no
IT	FAIRO	S	no	no	yes	no
LT	none					
LU	none					
LV	LAA	(C)	yes	n.a.	yes	no
MT	none					
NL	WPBL	S	no	no	yes	no
PL	none					
PT	AESH	S	no	yes	yes	no
PT	RENA	S	no	no	yes	no
RO	AAR	(S)	no	no	yes	no
SE	Transportföretagen	SO	no	yes	yes	yes
SE	Sobona	SO	no	no	yes	yes
SE	ALMEGA	SO	no	yes	yes	yes
SE	SAGE	SO	no	no	yes	yes
SI	none					
SK	UZvCL SR	C	yes	yes	yes	no

Notes: C, congruence; n.a., data not available; O, overlap; S, sectionalism; SO, sectional overlap. Green shading indicates a positive response. Names in bold are affiliated to at least one of the European organisations: ENAA, AIRE, ERA, A4D, CANSO, ACI Europe or ASA. Parentheses used for estimated assessment.

Source: Network of Eurofound correspondents, 2020

In terms of sector-relatedness, a distinction can also be made between employer organisations that cover only one subsector and those that organise employers in two or three subsectors. Table 23 lists 24 employer organisations that represent employers in only one subsector. The largest group are the 17 employer organisations from eight Member States that represent only ground handling activities. Table 24 lists all employer organisations that represent two or three subsectors.

Table 23: Membership domains of employer organisations covering only one of the three subsectors

Member State	Only aircrew	Only ATM	Only airports and ground handling services staff
BE	BAR, BATA		UPTR, FEBETRA, WF-BE
BG	no data for ASB		
DE			ABL, BDSL
EL	no data for AOFA		
ES	ALA, AECA		ASEATA
FR			SAMERA, SCARA, UAF
IT	Assaereo		Feder catering, FAIRO, Assohandlers
NL			WPBL
PT	APTTA		AESH, RENA
SE		SAGE	SOBONA, ALMEGA
Total	6 employer organisations in 4 Member States	1 employer organisations in 1 Member State	17 employer organisations in 8 Member States
	24 employer organisations organising only companies in 1 subsector		

Source: Network of Eurofound correspondents, 2020

Table 24: Membership domains of employer organisations covering two of the three subsectors, or all three

Member State	Aircrew and ATM staff	Aircrew and ground handling services	ATM and ground handling services	All three subsectors
AT		WKÖ-FVALS		
DE	AGVL	AGVL	AGVL	AGVL
DK	DI	DI	DI	DI
EE	ELK	ELK	ELK	ELK
FI	Palta	Palta	Palta	Palta
FR		FNAM		
HU	MVVLSz	MVVLSz	MVVLSz	MVVLSz
IT			Assaeroporti, Assocontrol	
LV	LAA	LAA	LAA	LAA
RO			AAR	
SE	Svenskt Flyg	Transportföretagen, Svenskt Flyg	Svenskt Flyg	Svenskt Flyg
SK			UZvCL SR	
Total	7 employer organisations in 7 Member States	10 employer organisations in 9 Member States	11 employer organisations in 10 Member States	7 employer organisations in 7 Member States
	26 employer organisations organising companies with employees in 2 or all 3 subsectors			

Source: Network of Eurofound correspondents, 2020

In Table 25, the organisational density of employer organisations in the civil aviation sector is assessed. In contrast to trade unions, membership data of employer organisations apply only to the entire sector, not to subsectors. For the employer organisations, organisational density can be assessed in two ways: by the number of member companies or by the number of employees working in member companies. Table 25 shows both the number of member companies and the share of civil aviation sector employees working in member companies. Moreover, this table indicates the relative importance of each employer organisation in each country, as far as related information has been provided.

Table 25: Organisational density of employer organisations in the entire civil aviation sector, 2020

Member State	Employer organisation	Member companies in whole civil aviation sector	People employed by member companies as share of total number of employees in civil aviation (%)	Relative importance in whole civil aviation sector
AT	WKÖ-FVALS	380	93	1
BE	BAR	n.a.	n.a.	n.a.
BE	BATA	8–15	n.a.	n.a.
BE	UPTR	2,611	n.a.	n.a.
BE	FEBETRA	4	n.a.	n.a.
BE	WF-BE	n.a.	n.a.	n.a.
BG	ASB	n.a.	n.a.	1
CY	none			
CZ	none			
DE	AGVL	41	52	1
DE	ABL	7	11	2 or 3
DE	VKA	n.a.	n.a.	2 or 3
DE	BDLS	23	n.a.	3
DK	DI	30	75–90	1
EE	ELK	8	50–90	1
EL	AOFA	n.a.	n.a.	1
ES	AECA	30	n.a.	2
ES	ASEATA	7	n.a.	1
FI	Palta	17	n.a.	1
FR	FNAM	176	55	1
FR	SAMERA	6	3	2
FR	SCARA	12	3	3
HR	none			
HU	MVVLSz	11	82	1
IE	none			
IT	Assaereo	2	25	1 or 2
IT	Assaeroporti	33	n.a.	1 or 2
IT	Federcatering	5	3	3
IT	Assocontrol	3	n.a.	3
IT	Assohandlers	n.a.	n.a.	3
IT	FAIRO	59	n.a.	3
LT	none			
LU	none			
LV	LAA	~ 40	n.a.	1
MT	none			
NL	WPBL	5	n.a.	1
PL	None			
PT	AESH	2	10	1
PT	RENA	19	< 1	2
RO	AAR	~ 20	~ 70	1
SE	Transportföretagen	112	69	1
SE	Sobona	20	5	3
SE	ALMEGA	2	27	2

Member State	Employer organisation	Member companies in whole civil aviation sector	People employed by member companies as share of total number of employees in civil aviation (%)	Relative importance in whole civil aviation sector
SE	SAGE	1	7	3
SI	none			
SK	UZvCL SR	n.a.	n.a.	1

Notes: *n.a.*, data not available. Names in bold are among the largest in civil aviation in the respective country. Names in italics organise companies in air transport activities only. Underlined names organise companies in both air transport activities and ATM/ground handling activities. Names in normal text organise companies in ATM/ground handling activities only. 1, largest trade union; 2, second-largest trade union; 3, middle-sized trade union; 4, smaller trade union.

Source: Eurostat, Structural Business Statistics; Network of Eurofound correspondents, 2020

3.2. Involvement of employer organisations in collective bargaining and social dialogue in the civil aviation sector

In the previous section, the sector-relatedness and organisational density of employer organisations were considered. This section examines their involvement in sector-related collective bargaining and consultation procedures, and their participation in bipartite and tripartite social dialogue affecting the sector. Information is separate for employer organisations active in the air transport subsector and those active in the services incidental to air transport subsector.

Table 26: Involvement of civil aviation employer organisations in collective bargaining, consultation procedures and social dialogue, 2020

Member State	Employer organisation	Collective bargaining involvement													Consultation	Social dialogue body		Type of organisation	Representative organisation	National affiliation	European affiliation	
		Pilots NACE 51.10	Pilots NACE 51.21	Cabin crew	ATC	ATSEP	Other ATM	Baggage handling	Ticket desk/check-in	Airport security	Aircraft maintenance/overhaul	Airport fire services	Services such as fuel, catering, de-icing	Air transport activities (NACE 51.10 + 51.21)		Bipartite	Tripartite					
AT	WKÖ-FVALS	yes	yes	yes	no	no	no	yes	yes	yes	yes	yes	yes	yes	yes	no	yes	EO	yes	WKÖ	no	
BE	BAR	yes	yes	yes	no	no	no	no	no	no	no	no	no	yes	yes	yes	no	EO	yes	no	no	
BE	BATA	yes	yes	yes	no	no	no	no	no	no	no	no	no	yes	yes	yes	no	EO	yes	FEB-VBO	no	
BE	UPTR	no	no	no	no	no	no	yes	no	no	no	no	no	no	yes	yes	no	EO	yes	UCM	no	
BE	FEBETRA	no	no	no	no	no	no	no	no	no	no	no	yes	no	yes	yes	no	EO	yes	VBO-FEB	no	
BE	WF-BE	no	no	no	no	no	no	no	no	no	yes	no	yes	no	yes	yes	no	EO	n.a.	VBO-FEB	no	
BG	ASB	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	ASA
CY	none																					
CZ	none																					
DE	ABL	no	no	no	no	no	no	yes	yes	no	no	no	yes	no	no	no	no	EO	yes	no	no	
DE	VKA	no	no	no	no	no	yes	yes	yes	no	no	yes	yes	no	n.a.	no	no	EO	yes	BVÖD	no	
DE	BDLS	no	no	no	no	no	no	yes	yes	yes	no	no	yes	no	no	no	no	EO	yes	no	no	
DE	AGVL	yes	yes	yes	no	yes	no	no	yes	no	yes	no	yes	yes	yes	no	no	EO	yes	BDA	no	
DK	DI	yes	yes	yes	no	no	no	yes	yes	yes	yes	yes	yes	yes	yes	no	yes	EO	yes	DA	no	
EE	ELK	no	no	no	no	no	no	no	no	no	no	no	no	no	no	no	no		no	no	no	
EL	AOFA	no	no	no	no	no	no	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	no	n.a.	no	no	EO	yes	n.a.	no	
ES	AECA	yes	yes	yes	no	no	no	no	no	no	no	no	no	yes	no	no	no	EO	yes	CEOE	no	
ES	ASEATA	no	no	no	no	no	no	yes	yes	no	no	no	no	no	n.a.	yes	no	EO	yes	no	no	

Member State	Employer organisation	Collective bargaining involvement													Consultation	Social dialogue body		Type of organisation	Representative organisation	National affiliation	European affiliation
		Pilots NACE 51.10	Pilots NACE 51.21	Cabin crew	ATC	ATSEP	Other ATM	Baggage handling	Ticket desk/check-in	Airport security	Aircraft maintenance/overhaul	Airport fire services	Services such as fuel, catering, de-icing	Air transport activities (NACE 51.10 + 51.21)		Bipartite	Tripartite				
FI	Palta	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	no	yes	yes	yes	yes	no	EO	yes	EK	no
FR	FNAM	(yes)	(yes)	(yes)	no	no	no	yes	n.a.	no	yes	no	yes	(yes)	yes	yes	no	EO	yes	MEDEF	no
FR	SAMERA	no	no	no	no	no	no	yes	no	no	no	no	yes	no	yes	yes	yes	EO	yes	no	no
FR	SCARA	no	no	no	no	no	no	yes	no	no	no	no	yes	no	yes	yes	yes	EO	yes	no	no
HR	none																				
HU	MVVLsz	no	no	no	yes	yes	yes	yes	yes	yes	yes	yes	yes	no	yes	yes	yes	EO	yes	MGYOSZ	no
IE	none																				
IT	Assaereo	yes	yes	yes	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	n.a.	no	no	EO	yes	Confindustria	no
IT	Assaeroporti	no	no	no	yes	yes	yes	yes	yes	yes	yes	yes	yes	no	no	no	no	EO	yes	Confindustria	ACI
IT	Feder catering	no	no	no	yes	yes	yes	yes	yes	yes	yes	yes	yes	no	no	no	no	EO	yes	Confindustria	
IT	Assocontrol	no	no	no	yes	yes	yes	yes	yes	yes	yes	yes	yes	no	no	no	no	EO	yes	Confindustria	
IT	Assohandlers	no	no	no	yes	yes	yes	yes	yes	yes	yes	yes	yes	no	no	no	no	EO	yes	Confetra	
IT	FAIRO	no	no	no	yes	yes	yes	yes	yes	yes	yes	yes	yes	no	no	no	no	EO	yes	no	
LT	none																				
LU	none																				
LV	LAA	no	no	no	no	no	no	no	no	no	no	no	no	no	no	no	no		no	no	no
MT	none																				
NL	WPBL	no	no	no	no	no	no	yes	yes	yes	yes	no	yes	no	no	yes	no	EO	yes	no	no
PL	none																				

Member State	Employer organisation	Collective bargaining involvement													Consultation	Social dialogue body		Type of organisation	Representative organisation	National affiliation	European affiliation
		Pilots NACE 51.10	Pilots NACE 51.21	Cabin crew	ATC	ATSEP	Other ATM	Baggage handling	Ticket desk/check-in	Airport security	Aircraft maintenance/overhaul	Airport fire services	Services such as fuel, catering, de-icing	Air transport activities (NACE 51.10 + 51.21)		Bipartite	Tripartite				
PT	AESH	no	no	no	no	no	no	yes	yes	no	yes	no	no	no	n.a.	no	no	EO	yes	no	no
PT	RENA	no	no	no	no	no	no	yes	yes	no	yes	no	yes	no	n.a.	no	no	EO	yes	no	no
RO	AAR	no	no	no	no	no	no	no	no	no	no	no	no	no	no	no	no	EO	no	n.a.	no
SE	Transport-företagen	yes	yes	yes	no	no	no	yes	yes	yes	yes	no	yes	yes	yes	yes	no	EO	yes	SN	ERA
SE	Sobona	no	no	no	no	no	no	yes	yes	yes	yes	yes	yes	no	no	no	no	EO	yes	no	no
SE	ALMEGA	no	no	no	no	no	no	yes	yes	yes	yes	yes	yes	no	no	no	no	EO	yes	no	no
SE	SAGE	no	no	no	yes	yes	yes	no	no	no	no	no	no	no	no	no	no	EO	yes	no	no
SI	none																				
SK	UZvCL SR	no	no	no	yes	yes	yes	yes	yes	yes	yes	yes	yes	no	yes	no	yes	EO	yes	no	no

Notes: EO, employer organisation; n.a., data not available. The three employers organisations in bold are the only organisations that are affiliated to a European employers' organisation, as is indicated in the far right column. There is one in Bulgaria, one in Italy and one in Sweden. The organisations marked in yellow are considered as employers organisations in the industrial relations system of the country, and the organisations marked in blue are considered representative. The dark grey cells indicate that the organisation is involved in collective bargaining covering professional groups or employees of the indicated activities. The light green cells indicate which organisations are consulted by governments. The lightest green cells indicate involvement in national bipartite or tripartite sectoral social dialogue structures.

Source: Network of Eurofound correspondents' national contributions to this study, 2020

In the air transport subsector, as many as 18 countries do not have an employer organisation. In the remaining nine countries (Austria, Belgium, Denmark, Finland, France, Germany, Italy, Spain, Sweden), exactly one employer organisation (or two in Belgium) can be identified that is involved in sector-related collective bargaining. All 10 employer organisations in these nine countries engage in collective bargaining on behalf of all categories of workers and occupations in the air transport subsector. France's FNAM is directly involved in collective bargaining only in the ground handling subsector, but indirectly (via a lower-level unit) in the air transport subsector. This means that there is no employer organisation involved in collective bargaining in only part of the workforce of the subsector.

This implies that, although almost all employer organisations represent members according to the sectional (or sectionally overlapping) model with regard to the whole civil aviation sector, they tend to represent members according to a congruent or overlapping model with regard to the air transport subsector (which means that they tend to represent the whole subsector). Five of the employer organisations related to the air transport subsector, in Austria, Denmark, Finland, France and Italy, also engage in collective bargaining in the ATM and/or ground handling subsector. Moreover, in the air transport subsector, eight employer organisations from seven countries are regularly consulted by the authorities in sector-related matters, while six organisations from five countries participate in sector-related bipartite or tripartite social dialogue bodies.

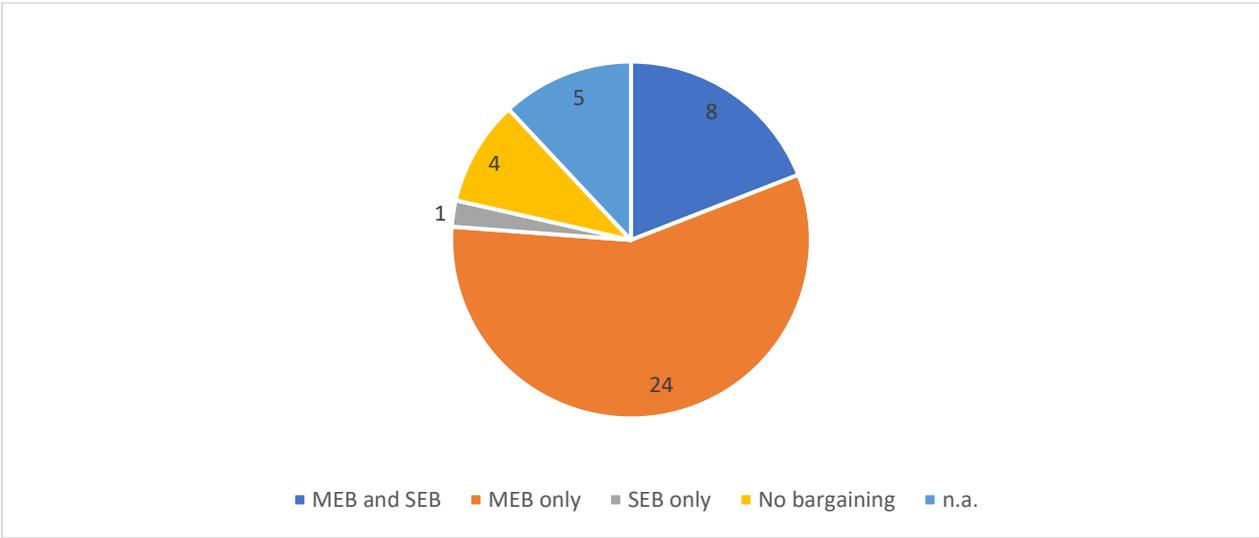
In the ATM and ground service subsectors, there is at least one employer organisation in 16 countries (15 Member States). There is no employer organisation for these subsectors in Croatia, Cyprus, Czechia, Estonia, Ireland, Latvia, Lithuania, Luxembourg, Malta, Poland, Romania and Slovenia (see Table 20b). In total, 31 employer organisations were identified as representing these subsectors. At least 28 of them are involved in collective bargaining related to the ATM and ground handling subsectors. There is no information on collective bargaining involvement for ASB of Bulgaria and AOFA of Greece. In contrast to their counterparts in the air transport subsector, employer organisations in the ATM and ground service subsectors tend to conduct collective bargaining only for part of the subsector in terms of business activities/occupations. Only MVVLSz of Hungary, the five organisations in Italy (although none of them represents an entire subsector; rather, each represents a specific segment) and UZvCL SR of Slovakia conclude collective agreements covering the whole subsector. In the case of the five employer organisations in Italy, they jointly sign a sector agreement and thus collectively form a bargaining body in the subsector.

Most of the employer organisations, however, carry out bargaining activities on behalf of companies active in either (part of) the ATM business segment or (part of) the ground handling activities segment of the subsector. This is due to the variety and heterogeneity of business activities included in the subsector according to NACE 52.23. Given that business activities within the ground service segment alone are so diverse – from baggage handling to fuel and airport fire services – as many as 15 employer organisations from eight countries are engaged in collective bargaining covering only part of this civil aviation segment rather than all activities/employees within ground service activities. Like the situation on the trade union side, sectional bargaining in the subsector ensues from the predominance of employer organisations' membership representation being sectional or sectionally overlapping with regard to the ATM and ground service subsector. Moreover, 15 employer organisations from 10 countries are consulted by the authorities, and again 16 organisations from 10 countries participate in bipartite or tripartite social dialogue structures.

Figure 14 offers an indication of the form of collective bargaining carried out by employer organisations in the entire civil aviation sector. As opposed to trade unions, which are predominantly engaged in

single-employer bargaining in the sector, almost all employer organisations conduct multi-employer bargaining, in some cases in tandem with single-employer bargaining. Only MVVLSz of Hungary exclusively engages in single-employer bargaining. However, due to employer organisations' often sectionalist membership, with representation tailored to particular business segments, multi-employer bargaining usually does not encompass the sector as a whole. Rather, in most countries with established multi-employer bargaining structures, agreements for specific parts of the sector are complemented by single-employer agreements for larger companies (such as air carriers, airports and air control agencies), while other (smaller) companies often fall through the cracks.

Figure 14: Involvement of civil aviation employer organisations in different forms of collective bargaining (number of employer organisations), 2020



Notes: N = 36. MEB, multi-employer bargaining; n.a., data not available; SEB, single-employer bargaining.
Source: Network of Eurofound Correspondents, 2020

4. Collective bargaining and social dialogue in the sector, and fragmentation of the actors

The representativeness of national social partner organisations is of interest to this study in terms of the capacity of their European umbrella organisations to participate in European social dialogue. In turn, their representativeness is important for the implementation of agreements made by European-level organisations at national, regional and local levels. The role played by social partners in collective bargaining, social dialogue and public policymaking is an important component of representativeness. The relevance of the European sectoral social dialogue tends to increase with the growing ability of the national affiliates of the European organisations to regulate employment terms and influence national public policies affecting the sector (Perin and Léonard, 2011).

A cross-national comparative analysis shows a generally positive correlation between the bargaining role of the social partners and their involvement in public policy (Traxler, 2004). This trend is corroborated by an analysis of the involvement of the civil aviation sector organisations in bipartite and tripartite bodies dealing with the sector-specific public policies presented in this section. Multi-employer bargaining tends to have a greater significance in this regard, primarily because of the macroeconomic impact of such agreements – unless there are, as is the case in the civil aviation sector in most countries, single-employer agreements in place involving very large companies, which serve to set an industry ‘standard’ or signalling effect.

4.1. Collective bargaining patterns

As demonstrated above, the vast majority of sector-related trade unions (92%) and employer organisations (80%) are involved in collective bargaining. Information on the coverage and nature of collective bargaining in the entire civil aviation sector is summarised in Table 27.

Of the 166 trade unions, 51 (31%) are involved in multi-employer bargaining, either as the exclusive form of bargaining or in combination with single-employer bargaining. A clear majority of trade unions (61%), though, are involved in single-employer bargaining only. In contrast, the majority of employer organisations (58%) engage in exclusive multi-employer bargaining, and an additional 20% combine multi- and single-employer bargaining. Just one employer organisation carries out single-employer bargaining only. For two trade unions and four employer organisations, no information on bargaining involvement is available.

Table 27: Collective bargaining in the civil aviation sector (number and % of organisations), 2020

Type	Trade unions				Employer organisations					
No collective bargaining	14 (8%)				170 (100%)	4 (9%)				
Multi-employer bargaining only	11 (6%)	51 (30%)	143 (84%)	154 (91%)		24 (56%)	32 (74%)	9 (21%)	33 (77%)	43 (100%)
Both single- and multi-employer bargaining	40 (24%)					8 (19%)				
Single-employer bargaining only	103 (61%)					1 (2%)				
No data available	2 (1%)	5 (12%)								

Note: Percentages are rounded to the nearest 1%.

Source: Network of Eurofound Correspondents, 2020

In Tables 28 and 29, collective bargaining information is presented on a country-by-country basis, illustrating national collective bargaining patterns and levels of collective bargaining coverage in the civil aviation industry. Both tables provide an impression of the presence and level of multi- and single-employer bargaining. Whereas multi-employer bargaining requires the existence of an employer organisation that represents a collective entity of employers, single-employer bargaining usually takes place without the involvement of employer organisations. In the majority of countries, single-employer bargaining is the exclusive (14 countries) or predominant (4 countries) form of bargaining. In countries with exclusive or predominant single-employer bargaining, the rate of collective bargaining coverage tends to fall short of that in countries with exclusive (Sweden) or predominant (Belgium, Denmark, France, Italy, Portugal, Slovakia, and Spain) multi-employer bargaining in the civil aviation sector.

Table 28: Type of collective bargaining by country, 2020

Type of collective bargaining	Countries
Multi-employer bargaining	SE
Single-employer bargaining and multi-employer bargaining	AT, <u>BE</u> , DE, <u>DK</u> , <u>ES</u> , FI, <u>FR</u> , <u>IT</u> , NL, <u>PT</u> , <u>SK</u>
Single-employer bargaining	BG, CY, CZ, EE, HR, HU, IE, LT, LU, LV, MT, PL, RO, SI
No info provided	EL (it can be assumed there is single-employer bargaining)
No collective bargaining	

Notes: In the Netherlands, the employer organisation WPBL was founded in 2018 in order to establish multi-employer bargaining in the sector. Negotiations on a sectoral agreement are ongoing. Country abbreviations that are underlined indicate predominance of multi-employer bargaining, while single-employer bargaining co-exists.

Source: Network of Eurofound Correspondents’ national contributions to this study, 2020

However, countries with exclusive single-employer arrangements may also record relatively high collective bargaining coverage rates if (most of) the largest companies are willing to engage in collective bargaining. This is particularly true of Luxembourg and Malta, with coverage rates higher than 75% in the sector. We see the same in Austria, Finland and Germany, although to a lesser extent. Although no consistent estimates have been provided for the Netherlands, it could serve as an example of countries with predominant single-employer arrangements in the sector and yet high collective bargaining coverage rates.

High coverage rates in these countries derive from the existence of single-employer agreements with the largest airlines and/or airports as well as the air control agencies, while, for some smaller business areas (foreign air carriers in the case of Austria) or occupational groups (cabin crew in the case of Finland), multi-employer collective agreements have been concluded. In Germany, distinguishing single- and multi-employer agreements is difficult, as the signatory employer organisation AGLV largely represents the Lufthansa Group, including the Lufthansa air carrier with all its numerous subsidiaries. This is multi-employer bargaining conducted by a sectoral employer organisation, but in reality, it only covers one single employer, the Lufthansa Group.

Table 29: Collective bargaining coverage and level by country, 2020

Type of collective bargaining	Collective bargaining coverage					
	> 90%	76–90%	51–75%	25–50%	< 25%	Information not available
Multi-employer bargaining	SE					EL
Single-employer bargaining and multi-employer bargaining	AT, <u>BE</u> , <u>ES</u> , FI, <u>FR</u> , <u>PT</u>	<u>DK</u> , <u>IT</u> , <u>SI</u>	DE			NL, <u>SK</u>
Single-employer bargaining	LU	MT	CZ, HR, IE	HU	LT, RO	BG, CY, EE, LV, PL
No collective bargaining						

Note: Country abbreviations that are underlined indicate predominance of multi-employer bargaining, while single-employer bargaining co-exists.

Source: Network of Eurofound Correspondents, 2020

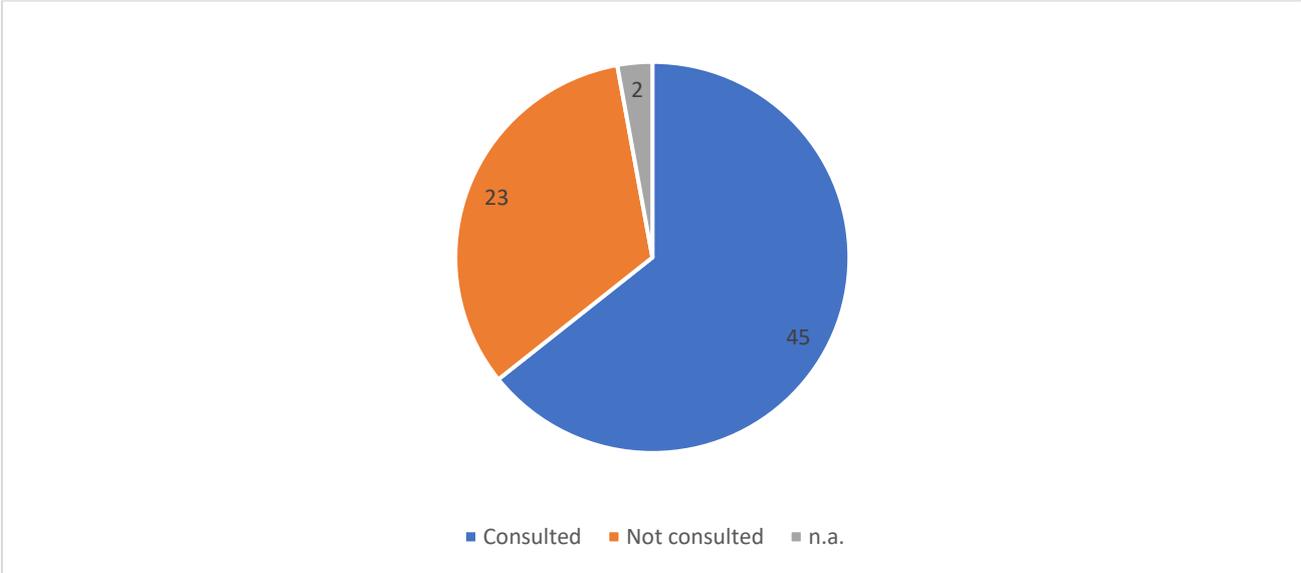
In a number of Member States, namely Bulgaria, Cyprus, Estonia, Greece, Latvia, the Netherlands, Poland and Slovakia, no (consistent) information on collective bargaining coverage rates for the civil aviation sector has been provided.

4.2. Participation in public policy, by consultation

Involvement in policymaking is another indicator of the relevance of national social partner organisations in the sector. In a significant number of Member States (particularly in northern and western Europe), social partners' participation in public policymaking has long been established. In a number of other countries (particularly in central and eastern Europe), such involvement has emerged more recently. Still, in many of these countries it is already rather formalised, such as in tripartite bodies at central level. While, in general policymaking, representation tends to take place through key social partner organisations, consultation in sector-related matters usually involves sectoral social partner organisations.

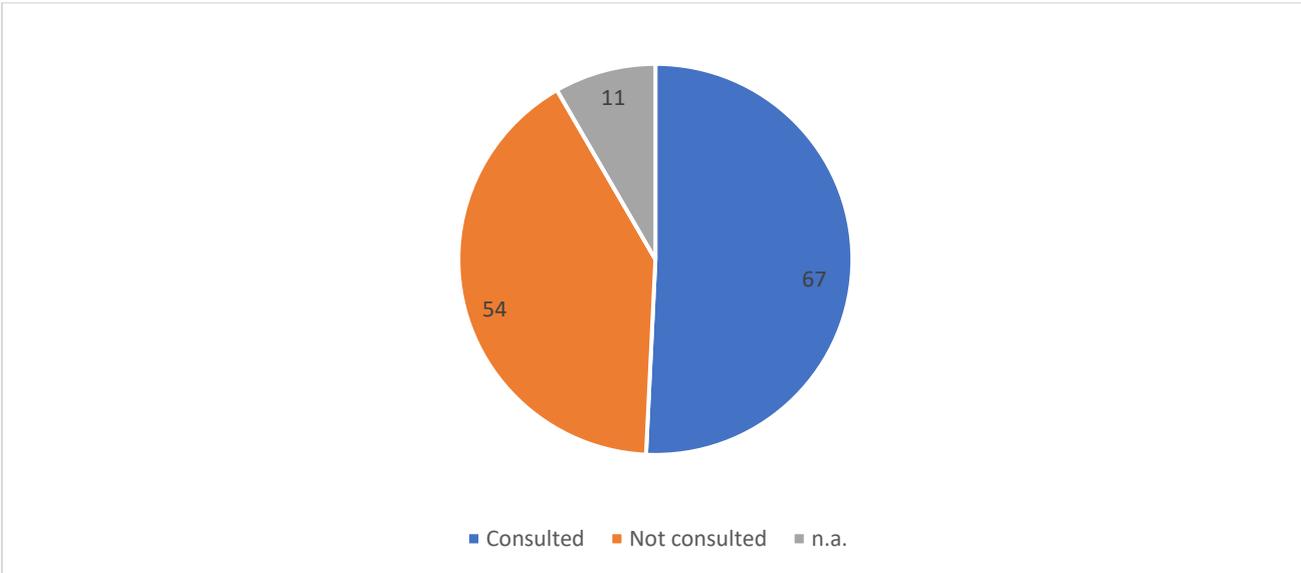
Figures 15 and 16 provide an overview of the involvement of trade unions in relevant policymaking affecting the sector at national level, with one figure for air transport and another for service activities incidental to air transport. Relatively more trade unions representing air transport workers (45, or 64%) are consulted by authorities on issues related to working conditions or employment than are trade unions representing ATM and ground service activities (67, or 51%). For 2 (3%) and 11 trade unions (8%), respectively, no information has been provided to assess if they are consulted.

Figure 15: Trade unions consulted in the air transport subsector (number), 2020



Source: Network of Eurofound Correspondents, 2020

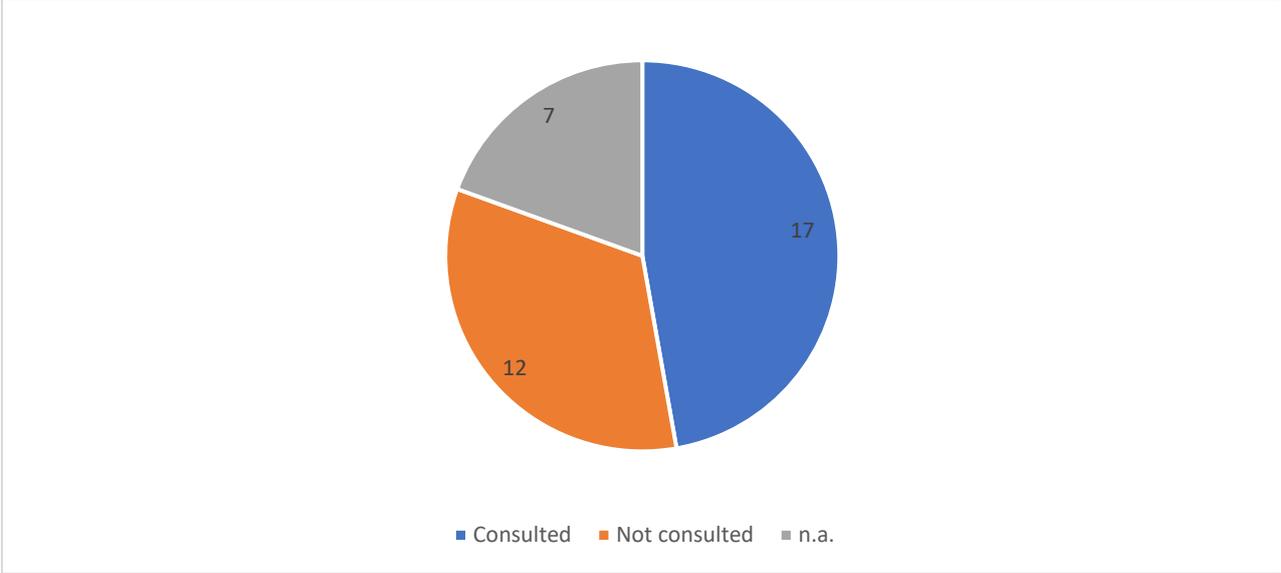
Figure 16: Trade unions consulted in the service activities incidental to air transport subsector (number), 2020



Source: Network of Eurofound Correspondents, 2020

For employer organisations, separate graphs for the two subsectors appears to be pointless, due to the small number of employer organisations, particularly in the air transport subsector. Therefore, Figure 17 shows the number of employer organisations consulted for the whole civil aviation sector. Of the 36 employer organisations in the sector, 17 (47%) are consulted by administrations on issues related to working conditions or employment, while 12 (33%) are not. For the 7 remaining organisations, not enough information is available to assess whether they are consulted. Compared with the trade unions, particularly in the air transport subsector, a slightly smaller proportion of employer organisations are consulted by the authorities.

Figure 17: Employer organisations consulted in the entire civil aviation sector (number), 2020



Source: Network of Eurofound Correspondents, 2020

Table 30 shows that in all countries except Estonia, Hungary, Ireland, Slovenia and Spain at least one trade union in the sector is consulted. No information on consultations for Bulgaria’s three trade unions has been provided. All trade unions are consulted in the pluralist systems of Denmark, Finland, Italy, Lithuania and Luxembourg. The situation is unclear in Poland and Slovakia, with information not available for all unions. Unions that did provide information are all consulted.

Table 30: Consultation of trade unions and employer organisations, by country, 2020

	At least one trade union consulted	No trade unions consulted
At least one employer organisation/business association consulted	AT, BE, DE, DK, FI, FR, SE, SK	HU
No employer organisations/business associations consulted	CY (no employer organisation), CZ (no employer organisation), EL (no information on EO consultation), HR (no employer organisation), IT (no information on employer organisation consultation), LT (no employer organisation), LU (no employer organisation), LV (no employer organisation), MT (no employer organisation), NL, PL (no employer organisation), PT (no information on employer organisation consultation), RO (no employer organisation)	BG (no information on trade union or employer organisation consultation), EE (no employer organisation), ES (no information on employer organisation consultation), IE (no employer organisation), SI (no employer organisation)

Source: Network of Eurofound Correspondents, 2020

For employer organisations, meanwhile, the table shows nine countries (Austria, Belgium, Denmark, Finland, France, Germany, Hungary, Slovakia, Sweden) where at least one employer organisation is consulted. In the pluralist associational systems of Belgium and France, all of the associations are consulted, whereas in Germany and Sweden only one in four employer organisations is consulted. In the Netherlands, one employer organisation was identified that could be consulted but is not. In an additional 12 countries, there are no employer organisations: Croatia, Cyprus, Czechia, Estonia, Ireland, Latvia, Lithuania, Luxembourg, Malta, Poland, Romania and Slovenia. In Bulgaria, Greece, Italy, Portugal and Spain, there is at least one sector-related employer organisation, but no information on whether any of them is consulted.

Due to the lack of information on consultation practices in the case of so many organisations on both sides of industry, it is difficult to assess whether consultation rights are attributed equally to the labour market parties or whether only one side is favoured by the administrations.

4.3. Participation in bipartite or tripartite social dialogue structures

The involvement of sector-related social partners in tripartite and/or bipartite bodies that address sector-related topics implies a kind of mutual recognition. In EU Member States without established practices of multi-employer bargaining, this involvement can be a way to gain mutual recognition as representative counterparts. Table 31 lists the trade unions and employer organisations that participate in these structures. A total of 11 countries report sector-related bipartite and/or tripartite bodies. In terms of sector-relatedness, it is not always completely clear whether these are strictly sector related or part of a wider setting.

Table 31: Tripartite and bipartite social dialogue bodies in which sector-related issues are addressed and in which sector-related social partners are involved, 2020

Member State	Social dialogue body	Bipartite/ tripartite	Scope/field of activity	Origin: agreement/ statutory	Trade unions participating	Employer organisations participating
AT	Social dialogue within the framework of the 'Road map civil aviation 2020' – social, technical, environmental issues, aimed at improving connectivity and competitiveness of the Austrian civil aviation sector; hosted by the Federal Ministry of Transport	Tripartite	Development of coherent and sustainable business strategy of the Austrian civil aviation sector	Agreement	Vida, GPA-djp, ACA	WKÖ – FVALS
BE	Bijzonder Sociaal Fonds en Fonds voor vakbondsopleiding voor het personeel voor de andere luchtvaartmaatschappijen dan SABENA (Special Social Fund and Trade Union Training Fund for staff of airlines other than SABENA)	Bipartite	Trade union training	Statutory	ACV-CSC, ABVV-FGTB, ACLV-CGSLB	BAR, BATA

Member State	Social dialogue body	Bipartite/tripartite	Scope/field of activity	Origin: agreement/statutory	Trade unions participating	Employer organisations participating
	Fonds voor bestaanszekerheid PC 315.02, afgekort SF/FS 315.02 (Livelihood security fund Joint Committee 315.02)	Bipartite	Livelihood security	Statutory	ACV-CSC, ABVV-FGTB, ACLV-CGSLB	BAR, BATA
BG						
CY						
CZ						
DE	German Social Accident Insurance Institution for Commercial Transport, Postal Logistics and Telecommunication (BG Verkehr)	Bipartite	Occupational health and safety, occupational pensions	Statutory	Yes	Yes
DK	Branchepanelet for luftfart (Industry Panel for Aviation)	Tripartite	Aviation safety	Statutory	FPU, Dansk Metal	Trafikstyrelsen (Ministry of Transport), DI and Brancheforeningen Dansk Luftfart, Erhvervsflyvningens sammenslutning, ES-DAA, SAS, Copenhagen Airports, Billund Airport, Naviair, Dansam, Danish Chamber of Commerce (Dansk Erhverv)
	Rådet for Dansk Luftfart (Danish Aviation Board)	Tripartite	Aviation politics, aiming to secure a competitive Danish aviation sector	Statutory	FPU, DALPA, CUD, 3F	Ministry of Transport (Trafikstyrelsen), Copenhagen Airports (together with many smaller Danish airports), Erhvervsflyvningens sammenslutning, ES-DAA, DI – Brancheforeningen Dansk Luftfart, SAS, a representative from Danish charter operators, a representative from Danish freight aviation

Member State	Social dialogue body	Bipartite/tripartite	Scope/field of activity	Origin: agreement/statutory	Trade unions participating	Employer organisations participating
	Luftfartens Klimapartnerskab (Climate partnership of Danish aviation)	Tripartite	One out of 13 Danish 'climate partnerships'. Discussion about how to improve the climate within different sectors	Statutory	FPU, 3F	Ministry of Transport, SAS, CPH Airport, Bill Airport, Aarhus Airport, Aalborg Airport, DI Transport, Naviair, DAT, Sunclass Airlines
	Transporterhvervets Uddannelser – Brancheudvalg Lufthavn (Vocational Training of the Transport Industry – Danish Airport Council)	Tripartite	Training of aviation operators	Statutory	3F	DI (represented by different member companies within aviation)
EE						
EL						
ES	Joint Commission of Collective Agreement of Handling	Bipartite	Working conditions, questions related to the collective agreement	Agreement	CCOO, UGT, USO	ASEATA
FI	Työturvallisuuskekuksen ilmailualan toimialaryhmä (Working Group at the Centre for Occupational Safety)	Bipartite	The group promotes occupational safety within the sector and cooperation thereupon and develops working life at workplaces	Agreement	Pro, IAU,* YTY*	Palta*
FR	Observatoire prospectif des métiers & des qualifications de l'Aérien (Prospective Observatory of Trades and Qualifications in the Air Industry)	Bipartite	Professional training, employment	Agreement	FNEMA – CFE CGC, UFA – FGTE CFDT, FGT CFCT, FNST CGT (CGT Transports), FEETS-FO, SNPL, UNSA	FNAM, SCARA
	AKTO-Opcalia	Bipartite	Professional training	Agreement	FNEMA – CFE CGC, UFA – FGTE CFDT, FGT CFCT, FNST CGT (CGT Transports), FEETS-FO, UNSA	FNAM, SCARA, Fédération Française des drones civils, UAF
	Commission Paritaire Nationale de l'Emploi (CPNE) des Personnels navigants (National Joint Employment Commission for crew)	Bipartite	Collective bargaining	Agreement	FNEMA – CFE CGC, UFA – FGTE CFDT, FGT CFCT, FNST CGT (CGT Transports), FEETS-FO, SNPL, UNSA	FNAM, SCARA

Member State	Social dialogue body	Bipartite/tripartite	Scope/field of activity	Origin: agreement/statutory	Trade unions participating	Employer organisations participating
	Commission Paritaire Nationale de l'Emploi (CPNE) du transport aérien et personnel au sol (National Joint Employment Commission for air transport and ground personnel)	Bipartite	Collective bargaining	Agreement	FNEMA – CFE CGC, UFA – FGTE CFDT, FGT CFTC, FNST CGT (CGT Transports), FEETS-FO, UNSA	FNAM, SCARA
	Commission Paritaire Nationale de l'Emploi (CPNE) du personnel navigant technique des exploitants d'hélicoptères (National Joint Employment Commission for helicopter operators' flight crew)	Bipartite	Collective bargaining	Agreement	SNPNAC	GIFAS (affiliated to FNAM)
	Commissions paritaires nationales d'interprétation (CPNI) – Personnel au sol (Joint National Interpretation Committees – Ground staff)	Bipartite	Collective bargaining	Agreement	FNEMA – CFE CGC, UFA – FGTE CFDT, FGT CFTC, FNST CGT (CGT Transports), FEETS-FO, SNPL, UNSA	
	Caisse de retraite du personnel navigant professionnel de l'aéronautique civile (CRPN) (Pension fund for professional aircrew in civil aviation)	Tripartite	Pension	Statutory	SNPNAC, FEETS-FO (SNPNC), SNPL, UNSA	FNAM, SCARA
	Conseil supérieur de l'aviation marchande (Higher Council for Merchant Aviation)	Tripartite	Sectoral affairs	Statutory	FNEMA – CFE CGC, UFA – FGTE CFDT, FGT CFTC, FNST CGT (CGT Transports), FEETS-FO (SNPNC), SNPL, UNSA	FNAM, SCARA, other members
	Conseil de discipline du personnel navigant professionnel de l'aéronautique civile (Disciplinary Council for Professional Aircrew in Civil Aviation)	Tripartite	Professional discipline		SNPL, FEETS-FO (SNPNC), unspecified others	n.a.
HR						
HU	LÁPB – Légiszlítási Ágazati Párbeszéd Bizottság (Sectoral Dialogue Committee for Air Transportation)	Bipartite or sometimes (very rarely) tripartite	Working on a sector-level collective bargaining agreement,	Statutory	RMFSZ, LESZ	MVVL SZ, Budapest Airport (BUD) Group

Member State	Social dialogue body	Bipartite/tripartite	Scope/field of activity	Origin: agreement/statutory	Trade unions participating	Employer organisations participating
			labour laws and regulations on training in the sector			
IE						
IT						
LT						
LU						
LV						
MT						
NL						
PL	Trójstronny Zespół Branżowy do Spraw Transportu Lotniczego i Obsługi Lotniskowej (Tripartite Branch Team for Air Transport and Airport Service)	Tripartite	Conducting a tripartite social dialogue to ensure the conditions for the development of the air transport sector as well as reconciling the interests of the parties and maintaining social peace	Established in 2016 at the joint request of employers and trade unions, members of the Social Dialogue Council on the basis of existing law (Article 40(3) of the Act of 24 July 2015 on the Social Dialogue Council and other social dialogue institutions)	Cross-sectoral trade unions, which are members of the Social Dialogue Council: FZZ, NSZZ Solidarność (National Section of Air Transport and Airport Service Workers), OPZZ	Cross-sectoral employer organisations, which are members of the Social Dialogue Council: Konfederacja Lewiatan, Pracodawcy RP, Business Centre Club, Związek Przedsiębiorców i Pracodawców
PT						
RO	Comitetul Consultativ pentru Transport (Consultative Committee for Transportation)	Tripartite	Consultative body created in 2012. Domain: public investments, gender equality, sustainable development	Agreement	Federația Națională a Sindicatelor din Aeroporturi and other trade unions from transport sector (but not civil aviation)	Asociația Aeroporturilor din România
SE	Luftfartsrådet (Aviation Council)	Tripartite	Discussing 'the future of the civil aviation sector', any issue arising	Agreement	Unionen	Company LVF, Company Swedavia, Swedish Government, Swedish Transport Agency, SRFF, Swedish Armed Forces
SI						
SK						

Note: * According to the group's website.

Source: Network of Eurofound Correspondents, 2020

4.4. Fragmentation and pluralism in the civil aviation sector

This section provides an overview of the reasons for organisational fragmentation and pluralism in the sector. Fragmentation occurs when different organisations represent different segments of a sector. This makes these organisations' membership domains complementary to each other, as they are not (fully) overlapping. Pluralism, on the other hand, occurs when organisations coexist in the same (or very similar) domain, representing the same types of companies and/or employees.

In the civil aviation sector, there is an average of 6.1 trade unions per country. Reasons for trade union fragmentation and pluralism in different countries are shown in Table 32. The most common reason for the presence of more than one trade union in the sector is that they organise different categories of workers (blue- or white-collar, public servants, specific occupational groups, etc). This is the case in 20 Member States.

In 20 countries, trade unions count members in separate parts/segments of the sector (for instance, one union represents only flight personnel and another only ATM staff). However, fragmentation can only rarely be explained by membership domains that are demarcated geographically (in just three countries are there trade unions that organise employees in only particular parts/regions of the country). Likewise, in only five Member States do trade unions organise members in different types of companies (in terms of size, ownership or legal form). Lastly, in eight Member States the sector has more than one trade union because they represent different ideologies.

Table 32: Reasons for trade union fragmentation and pluralism in the civil aviation sector, 2020

Member State	Organise different categories of workers	Members in different parts of the country	Members in different types of company (size or ownership)	Members in different parts of the sector/types of activity	Similar membership domains but different ideologies	Other reason
AT						
BE						
BG						
CY						
CZ						
DE						
DK						14
EE						
EL						
ES						15
FI						
FR						
HR						
HU						
IE						
IT						
LT						
LU						
LV						16
MT						
NL						

¹⁴ Another reason for fragmentation/pluralism in Denmark is the coexistence of sectoral and company trade unions.

¹⁵ In Spain, sectoral and company trade unions also coexist.

¹⁶ Latvia's two trade unions have the same membership domain and, principally, both represent workers of the entire sector, but de facto each of them focuses on specific occupational groups.

Member State	Organise different categories of workers	Members in different parts of the country	Members in different types of company (size or ownership)	Members in different parts of the sector/types of activity	Similar membership domains but different ideologies	Other reason
PL						
PT						
RO						
SE						
SI						
SK						

Source: Network of Eurofound Correspondents, 2020

Fragmentation/pluralism is less common among employer organisations. This is because there are far fewer employer organisations than trade unions in the civil aviation sector. On average, only 1.3 employer organisations can be identified per country, although the number of employer organisations varies greatly between countries: some have none, with others having up to six. Table 33 shows that the main reason for fragmentation of representation on the employers' side is that organisations have members in different parts of the sector or in different types of activity. This is the case in four Member States. Three countries record having employer organisations that represent different types of companies. Fragmentation due to regional or ideological differences does not exist in the sector. In several countries, such as Austria, Bulgaria, Denmark, Finland, Greece, Hungary, the Netherlands and Slovakia, only one sector-related employer organisation for the whole civil aviation sector can be identified, so no fragmentation or pluralism occurs.

Table 33: Reasons for fragmentation and pluralism of employer organisations in the civil aviation sector, 2020

Member State	Members in different parts of the country	Members in different types of company (size or ownership)	Members in different parts of the sector/types of activity	Similar membership domains but different ideologies	Other reason
AT	<i>Only one in the sector</i>				
BE					
BG	<i>Only one in the sector</i>				
CY	<i>None in the sector</i>				
CZ	<i>None in the sector</i>				
DE					
DK	<i>Only one in the sector</i>				
EE	<i>Only one in the sector</i>				
EL	<i>Only one in the sector</i>				
ES					
FI	<i>Only one in the sector</i>				
FR					
HR	<i>None in the sector</i>				
HU	<i>Only one in the sector</i>				
IE	<i>None in the sector</i>				
IT					
LT	<i>None in the sector</i>				
LU	<i>None in the sector</i>				
LV	<i>Only one in the sector</i>				
MT	<i>None in the sector</i>				
NL	<i>Only one in the sector</i>				
PL	<i>None in the sector</i>				

Member State	Members in different parts of the country	Members in different types of company (size or ownership)	Members in different parts of the sector/types of activity	Similar membership domains but different ideologies	Other reason
PT					17
RO	<i>Only one in the sector</i>				
SE					
SI	<i>None in the sector</i>				
SK	<i>Only one in the sector</i>				

Source: Network of Eurofound Correspondents, 2020

¹⁷ In Portugal, the employer organisations have similar membership domains but represent competing companies with different human resource policies.

5. Companies as industrial relations actors in the civil aviation sector

Because the employers' side of the civil aviation ESSDC is almost entirely composed of direct company membership in European employers organisations, the proportion of the entire sector they represent can only be measured by comparing with an overview of the numbers and types of companies in the sector. Therefore, this chapter will explore the company landscape for each of the three subsectors. An overview of the total number of companies in the different activity areas makes it possible to calculate what proportion of them is represented in the ESSDC. But this is not only about numbers; the number of companies per Member State operating in some activities is in some cases rather low. Specific types of sectoral activities are defined in this chapter, which is needed for the assessment of representativeness in the next chapter in order to see what kind of sectoral activities are represented by which European association, and to what extent. This sector-relatedness is the first representativeness criterion in Commission Decision 500 of 1998.

The second representativeness criterion in the decision is that, in order to be a European social partner, an organisation needs to be an integral and recognised part of the sectoral industrial relations landscape in the country. This chapter considers the role of civil aviation companies in the industrial relations setting in the different Member States. In cases where a very few companies employ a large proportion of the workforce in an activity area, their involvement in single-employer collective bargaining might be more relevant than multi-employer collective bargaining at sectoral level. This may also put the collective bargaining importance of large civil aviation companies on a comparable footing with employer organisations. When the workforce and turnover of those few large companies are very significant, they may also have a kind of dominant role in the sectoral employer organisations.

The main reason for the relatively marginal role employer organisations play compared with individual businesses – and compared with most other sectors of the economy – can be found in the aviation sector's historical evolution. Initially, national carriers, airports and navigation services were organised either as state monopolies or publicly owned entities; even though these entities have, in many cases, been (partially) privatised, their legacies continue to make them incumbents or major market players at least in their core business area. Since a real market with a considerable number of competitors (at least in the subsectors of air transportation and ground handling) has emerged only step by step, the formation of business and employer organisations has likewise been slow.

The analyses of the companies as industrial relations actors will be done first for the airline companies, second for the companies providing ground handling services and third for the companies in the ATM subsector.

5.1. Number of airline companies in the EU27

There were 426 airline companies in the EU27 in 2019 (before COVID-19) and 401 in 2020. That is an average of nearly 16 airline companies per country in 2019 and nearly 15 per country in 2020. The two Member States with the largest number of airline companies are France and Germany. In 2019, Germany had 71 and France 36. Four other Member States were home to more than 20 airline companies in 2019: Austria (29), Italy (25), Malta (33) and Spain (25). Together, these six Member States counted 219 airline companies in 2019, which was 51% of the 426 airline companies in the entire EU. Table 34 shows a middle group of 11 Member States with 10–19 airline companies each, and 7

Member States with 5-9 airline companies and 3 Member States with fewer than 5 airline companies each.

Table 34: Distribution of airline operators and aircraft by size by Member State, 2019

Number of aircraft	Number of airline operators				
	Fewer than 5	5–9	10–19	20–34	35 or more
Fewer than 20	HR, SI	SK	CY		
20–49		CZ, EE, LT			
50–99	LV	FI	RO, BG		
100–199		HU, LU	BE, EL, DK, PL		
200–499			NL, PT, SE	AT, IT, MT	FR
500 or more			IE	ES	DE
	3 Member States	7 Member States	11 Member States	4 Member States	2 Member States

Source: CIRIUM database

The columns in Table 34 note the number of airlines, while the rows indicate the number of registered aircraft per Member State. The Member States with the largest numbers of registered aircraft in 2019 were Germany (823 aircraft), Ireland (552), and Spain (511). At the other end of the spectrum are four Member States with fewer than 20 registered aircraft: Croatia (14), Cyprus (15), Slovakia (8) and Slovenia (16). There were 5,073 registered aircraft in total in 2019, an average of 188 per Member State, and an average of 12 aircraft per airline. Table 140 in Annex 3 provides detailed figures for each of the 27 Member States and also allows for comparison between the figures from 2020 and the pre-COVID figures from 2019.

5.2. Different types of airline companies

The average numbers of airline companies and registered aircraft per Member State do not reflect the huge diversity of types of airline companies. A small number of companies account for more than 100 registered aircraft. There are only eight airline companies with more than 100 registered aircraft in any single Member State: Ryanair (365 aircraft in Ireland),¹⁸ Lufthansa (296 in Germany), Air France (225 in France), SAS (152 in Sweden), EasyJet (138 in Austria), KLM (119 in the Netherlands), Wizz Air (110 in Hungary) and Eurowings (103 in Germany). Together these eight companies had 2,194 registered aircraft in 2019, which is 43% of the total for the EU27.

The degree of concentration of sectoral activities is even further developed, with groups and holdings bringing together several airline companies and alliances.

Diversity among airline companies is not only a matter of size, distinguishing airlines with many or with just a few registered aircraft. A more meaningful breakdown of airline companies is based on the type of air transport activities. This is reflected in the numbers and sizes of aircraft they operate and the

¹⁸ Ryanair indicated that for the entire Ryanair group around 460 aircraft were registered in 2019. The number of 365 in the CIRIUM database is for Ryanair alone, not for the Ryanair group, which would also include the 32 registered by the leisure airline company Buzz and the 23 registered by Lauda Air.

focus of their activities. The size of the aircraft can be measured in number of passenger seats¹⁹ and capacity to transport air freight.

Among the eight airline companies with more than 100 registered aircraft are flag carriers such as Lufthansa, Air France–KLM and SAS, but also LCCs such as Ryanair, EasyJet, Eurowings and Wizz Air. There are also network carriers and low-cost airlines with smaller numbers of registered aircraft. Together, the network carriers and LCCs operate about 53% of all registered aircraft. They also have the largest aircraft with the most passenger seats. On average, network carriers have about 207 passenger seats per aircraft, while LCCs have an average of 182 seats. Together, network carriers and LCCs accounted for 75% of the passenger seats on all registered aircraft in the EU27 in 2019, and 65% of the maximum take-off weight (MTOW), which gives an indication of the air freight capacity of the airline companies. Network carriers, however, have a much stronger freight capacity, with LCCs much more focused on passenger air transport. The sample group of 20 network carriers together in the developed typology corresponds to 47% of the total MTOW of all registered aircraft in the EU27 in 2019, while for the LCCs this is only 18%.

The four other types of airline companies in the developed typology are regional airlines, cargo air transport companies, leisure airline companies, charter aircraft companies and corporate air companies. Table 35 includes the number of companies included of each type, the number of aircraft operated by these companies and their proportion of all registered airlines in the EU27, the average number of passenger seats per aircraft, the proportion of all seats for the EU27 and the proportion of MTOW.

Table 35: Typology with seven categories of airline companies, 2019

Number of companies sampled	Type	Number of planes in sample	% of all 5,073 planes in EU27	Average number of seats	% of total seats in EU27	% of total maximum take-off weight (MTOW) in EU27
20	Network carriers	1,532	30	206	45	47
20	Low-cost	1,144	23	182	30	18
20	Regional	476	9.5	93	6	4
20	Cargo	265	5.2	0	0	10
20	Leisure	329	6.5	224	11	9
30	Charter and corporate air companies	309	7	12–170	1	2
130 companies (30%)	Total covered by the sample group	4,038	80	161	93	90

¹⁹ The number of seats does not necessarily correlate with the number of passengers, as this depends on the load factor. This indicator has, however, only been used to fine-tune further the proxy of the number of aircraft, because the numbers of pilots and cabin crew employed are not available for all airline companies. The number of aircrew employed is in the end the only factor relevant to determining the proportion of the sectoral workforce employed by the companies affiliated to European employer organisations. In the absence of complete data on this, the number of aircraft operated and their size in terms of passenger seats allow an estimation of that proportion. It has to be added here that some airlines only employ part of their workforce directly as employees, while others are self-employed or indirectly employed through temporary employment agencies.

301	Airlines not included (two-thirds are charter and corporate aircraft)	1,035	18	47	7	10
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Notes: The percentages of airplanes in the charter and corporate air companies is estimated to be around 20% for all companies in this category. For the other categories, the sample of 20 allows for some generalisation towards all companies in the category, because a large proportion is included in the sample. As there are many small charter and corporate air companies, the proportion of aircraft in this category is an underestimation and can be estimated to be around 20%. In addition, for the seats and MTOW the numbers included may be an underestimation, the real percentage could be around 5%.

Source: Cirium database and authors' own calculations

This developed typology does not cover all airline companies. It is, however, sufficiently complete and representative to allow a thorough assessment of the representativeness of European associations. For each type of airline company, a sample group of 20 or 30 has been taken into consideration. The right column in the table above indicates the number of airlines in each of the seven categories. The typology covers 130 airline companies, or 30% of the total of 426 airline companies in 2019. Together, these 130 airline companies operate 4,038 registered aircraft, which is 80% of all registered aircraft in the EU27 in 2019. They account for 93% of all passenger seats in registered aircraft, and 90% of the total MTOW.

The remaining 301 airline companies, not sampled for this typology, together account for 1,035 registered aircraft (20% of the total in the EU in 2019). The average of 47 passenger seats per aircraft indicates that they mainly operate smaller aircraft. Publicly available information about these companies confirms that many of them belong to the categories of smaller charter air companies, corporate air companies and cargo air transport companies.

5.2.1. Legacy airlines – network carriers

Network carriers operate about one-third of all registered aircraft in the EU. The main characteristics of network carriers are regularly scheduled flights between airports, and aircraft with an average number of seats above 200. This regular schedule is relevant for both passenger and freight air transport. Planning air transport connections of course depends on the potential demand and traffic, although a network carrier is faithful to flight schedules regardless of the number of seats sold. The strength of traditional airlines in long-haul markets lies in their local networks and the creation of hubs for connection flights, allowing them to keep their costs per seat relatively low.

Table 36: Sampling of 20 network carriers broken down into three subgroups by size, 2019

Member State	Airline company	Number of planes operated	Average number of seats per aircraft	Average number of aircraft operated in subgroup	Average number of seats per aircraft in subgroup
DE	Lufthansa	296	236	157	241
ES	Iberia	85	245		
FI	Finnair	61	222		
FR	Air France	225	245		
NL	KLM	119	257		
AT	Austrian Airlines	82	156	83	180
BE	Brussels Airlines	56	184		

EL	Aegean Airlines	51	177		
IE	Aer Lingus	58	204		
IT	Alitalia	93	197		
PL	LOT	86	139		
PT	TAP	84	206		
SE	SAS	152	160		
BG	Bulgaria Air	7	143	12	123
CY	Cyprus Airways	2	144		
CZ	Czech Airlines	8	119		
HR	Croatia Airlines	12	115		
LU	Luxair	20	111		
MT	Air Malta	11	175		
RO	TAROM	24	108		
Total		1,532 (30% of all aircraft in EU27)		77	206

Note: Alitalia is marked red because it no longer exists. It is included because the table reflects the situation in 2019. Eliminating Alitalia brings the total to 1,439, corresponding to 29% of all registered aircraft.

Source: Cirium database and authors' own calculations

Three subgroups of network carriers can be determined based on the number and size of aircraft operated. The 20 carriers have an average of 77 aircraft with an average of 206 passenger seats per aircraft. The first subgroup consists of Lufthansa, Iberia, Finnair, Air France and KLM, with an average of 157 aircraft and an average of 241 seats per aircraft. A middle group consists of Austrian Airlines, Brussels Airlines, Aegean Airlines, Aer Lingus, LOT, TAP and SAS, with an average of 83 aircraft and an average of 180 seats per aircraft. Finally, there is a subgroup comprising Bulgaria Air, Cyprus Airways, Czech Airlines, Croatia Airlines, Luxair, Air Malta and TAROM, with an average of 12 aircraft and an average of 123 seats per aircraft.

The reason why network carriers are sometimes also called legacy airlines is because of their historical background as large national, formerly state-controlled, airlines. The network carriers employ a large proportion of the civil aviation workforce in their countries. Of the 20 examples listed above, 16 are the largest employers of aircrew in 17 Member States. This is the case in Austria, Belgium, Croatia, Cyprus, Denmark, Finland, France, Germany, Greece, Italy, Luxembourg, the Netherlands, Poland, Portugal, Romania, Spain and Sweden. SAS is the largest employer of aircrew in both Denmark and Sweden. The four exceptions are Bulgaria Air, Czech Airlines, Air Malta and Aer Lingus, which are the second-largest airline companies in terms of aircrew employed in their countries. In Bulgaria, Bulgarian Air Charter employs the most aircrew. In Malta, the low-cost airline Malta Air does. In Czechia, the leisure airline Smartwings is larger than Czech Airlines, and in Ireland Ryanair employs more aircrew than Aer Lingus. The six Member States for which there is no network carrier among the largest three national employers of aircrew are Estonia, Hungary, Latvia, Lithuania, Slovakia and Slovenia.

Knowing that 18 of the 20 network carriers in the sample group are the largest employers of aircrew in their countries, and in the other 2 the second largest, does not indicate the proportion of aircrew employed in other airline companies in those Member States. As there are no exact figures on pilots and cabin crew employed, the proportion of aircraft operated in each country can be considered a functional equivalent of the pilots employed. The proportion of passenger seats in the aircraft the companies operate can give an indication of the proportion of cabin crew they employ. Table 37,

therefore, offers the proportion of registered aircraft in the home country of the airline and the proportion of passenger seats for three subgroups representing large, medium-sized and small percentages of the numbers in their respective countries.

Table 37: Network carriers in proportion to all operating aircraft per Member State, 2019

Sample group of network carriers	% of nationally registered aircraft	% of passenger seats in all nationally registered aircraft
Aegean Airlines (EL), Finnair (Fi), Air France (FR), KLM (NL), LOT (PL), SAS (SE), Croatian Airlines (HR)	50 or more	About 65 or more
Brussels airlines (BE), Lufthansa (DE), Alitalia (IT), TAP (PT), Luxair (LU) Cyprus Airways (CY), TAROM (RO)	30–40	50 or more
Austrian Airlines (AT), Iberia (ES), Aer Lingus (IE), Bulgaria Air (BG), Czech Airlines (CZ) and Air Malta (MT)	10–20	15–30

Source: *Cirium database and authors' own calculations*

In terms of industrial relations, 18 of the 20 network carriers are involved in single-employer bargaining in 21 Member States. SAS carries out single-employer bargaining in both Denmark and Sweden. The two network carriers not involved in collective bargaining are Bulgaria Air and Cyprus Airways.

5.2.2. Low-cost carriers

LCCs appear among the top three employers of aircrew in 10 EU Member States: Austria, Bulgaria, France, Germany, Hungary, Ireland, Italy, the Netherlands, Spain and Romania. In Hungary (Wizz Air) and Ireland (Ryanair), they are the largest employers of pilots and cabin crew. In seven Member States, an LCC is the second-largest employer. This is the case in Austria (Laudamotion), Bulgaria (Bulgarian Air), Germany (Eurowings), Italy (EasyJet), the Netherlands (Transavia), Romania (Blue Air) and Spain (Vueling). In three Member States, LCCs are the third-largest employers of aircrew: Austria (Eurowings), France (EasyJet) and Italy (Ryanair).

Information is too incomplete to determine the role of LCCs in industrial relations (listed in Table 38). It was confirmed for only six of them that they are involved in single-employer collective bargaining in seven Member States: Austria (Eurowings), Germany (Eurowings), Ireland (Ryanair), Italy (Ryanair), Malta (Malta Air), Romania (Blue Air) and Spain (Vueling and Iberia Express).

Some of the LCCs have aircraft registered in different countries, indicating they are multinationals. Examples are Eurowings in Austria and Germany, Level in Austria, France and Spain, and Transavia, which has registered aircraft in France and the Netherlands. In the case of Eurowings, it was also confirmed that it operates as an employer of aircrew and is involved in collective bargaining in both Austria and Germany. Ryanair is another example, operating as an employer of aircrew in most of the 27 Member States. However, based on the available information it appears to be involved in collective bargaining only in Ireland and in Italy. Ryanair indicated that this is not correct, although it could not share information on the other Member States where it is involved in collective bargaining.

Because of the missing data, the number of aircraft operated by LCCs can give us a better understanding of their proportion of the civil aviation sector (Table 38).

Table 38: Low-cost carriers, 2019

Member State	Company	Number of planes	% of planes in country	% of seats in country	Average number of seats per aircraft
AT	EasyJet	138	35	51	176
DE	Eurowings	103	13	13	152
ES	Vueling	121	24	27	185
HU	Wizz Air	110	89	52	200
IE	Ryanair ²⁰	365	66	75	189
AT	Eurowings Europe	21	5	7	165
AT	Lauda Air	23	6	9	180
AT	Level Europe	6	2	3	201
BG	Bul Air	3	6	7	148
DE	Germanwings	9	1	1	161
ES	Iberia Express	23	5	5	185
ES	Level (Spain)	4	1	2	314
ES	Volotea	33	6	4	143
FR	Level (France)	3	1	1	314
FR	Transavia France	36	8	9	190
IE	Norwegian Air	43	8	9	187
IT	Ernest Airlines	4	2	1	170
MT	Malta Air	48	19	52	189
NL	Transavia	33	14	14	181
RO	Blue Air	18	32	42	168
Total of this sample group of 20		1,144	23% of EU27		182

Note: Not possible to calculate total sum of '% of seats in country'.

Source: Cirium database and authors' own calculations

LCCs operate about one-quarter of the registered aircraft in the EU. From the sample set of 20 in Table 38, two subgroups can be defined based on the number of operated aircraft. EasyJet, Eurowings, Ryanair, Vueling and Wizz Air are examples of LCCs operating more than 100 aircraft. Ryanair is the largest, with 365 aircraft in operation in 2019. This corresponds to 66% of the aircraft registered in Ireland. Wizz Air operates 89% of the aircraft registered in Hungary. This shows the relative importance of these large LCCs for the civil aviation sector in their home country. EasyJet operates about one-third of the aircraft – and a full half of passenger seats – registered in Austria.

The other group consists of LCCs operating fewer than 50 aircraft. Looking at the proportion of aircraft operated and passenger seats in all registered aircraft in the country, Blue Air in Romania and Malta Air in Malta clearly make up a significant part of the civil aviation sector in their countries.

LCCs operate aircraft with between 140 and 205 passenger seats. This puts them in line with the middle group of the network carriers. Only the carrier Level in France and Spain operates aircraft with more than 300 passenger seats on average (Table 38). The relatively low MTOW of the aircraft operated by

²⁰ Ryanair indicated that for the entire Ryanair group there were about 460 aircraft registered in 2019. The number of 365 in the CIRIUM database is for Ryanair alone, not for the Ryanair group, which would also include the 32 registered by Buzz and the 23 registered by Lauda Air. As Buzz is categorised as a leisure airline in the CIRIUM database, it is not included in this table listing 20 examples of low-cost airline companies.

LCCs indicates that their main focus is on passenger air transport and not air freight, in contrast to the network carriers.

5.2.3. Regional airlines

Regional airlines are among the top three employers of aircrew in 10 Member States: Cyprus, Estonia, Greece, Spain, Finland, France, Latvia, Poland, Portugal and Sweden. In Estonia (Regional Jet OÜ) and Latvia (Air Baltic), a regional airline is the largest employer of pilots and cabin crew in the country. In Cyprus (TUS Airways), Greece (Olympic Airways), Finland (Nordic Regional Airlines), France (HOP!) and Portugal (SATA), a regional airline is the second-largest aircrew employer. And regional airlines are the third-largest employers in Spain (Air Europe), Poland (Sprint Air), Portugal (Portugalia Airlines) and Sweden (Braathens Regional Airlines).

Data could be obtained on six regional airlines involved in collective bargaining in six Member States. This is the case for Greece (Olympic Airways), Finland (Nordic Regional Airlines), France (HOP!), Latvia (Air Baltic), Portugal (Portugalia Airlines) and Sweden (Braathens Regional Airlines). Five of them are affiliated to national employer organisations, although not all of the employer organisations are dedicated to the civil aviation sector.

Regional airlines share three characteristics. First, they mainly operate smaller aircraft with a lower number of seats. As can be seen in Table 39, aircraft operated by regional airlines contain an average of 93 passenger seats. This means they do not have the costs associated with larger aircraft, such as sizeable hangars and maintenance work on massive engines. Second, they operate on a much smaller scale, as a proportion of both national totals and EU totals of aircraft, seats and MTOW. Only Air Baltic is in line with national aircraft, seats and MTOW, and it accounts for more than 50% of passenger traffic in its home country. All other regional airlines are well below 30%. Third, the focus of regional airlines is much more on passenger transport than on freight. This is something they have in common with LCCs. Some of them are part of the same airline holding group as network carriers, such as Lufthansa, Air France, Alitalia or KLM. Strikingly, these regional airlines linked to larger airline holding companies are the largest regional airlines in terms of the numbers of aircraft they operate.

The regional airlines included in Table 39 operate about 9% of all registered aircraft in the EU27.

Table 39: Regional airlines, 2019

Member State	Airline	Number of planes	% of planes in country	Average number of passenger seats per aircraft
DE	Lufthansa CityLine	54	7	107
EL	Olympic Air	12	12	66
EL	Sky Express	11	11	58
ES	Air Europe Express	21	4	95
ES	Air Nostrum	45	9	88
ES	Binter Canarias	28	5	81
ES	Canary Fly	7	1	70
FI	Nordic Regional Airlines	24	26	86
FR	Air Corsica	12	3	124
FR	HOP!	71	16	80
IT	Air Dolomiti	14	6	120
IT	Alitalia CityLiner	20	8	91
LV	Air Baltic	38	75	123
NL	KLM Cityhopper	49	21	96

PL	SprintAir	18	10	11
PT	EuroAtlantic Airways	6	3	277
PT	Azores Airlines	6	3	181
PT	Portugalia Airlines	20	10	96
RO	CarpatAir	3	5	100
SE	Braathens Regional Airways	17	7	68
Total		476	9% of planes in EU27	93

Note: The grey cells indicate that the airline is part of a holding of airline companies, namely Lufthansa, the Air France–KLM group and Alitalia.

Source: Cirium database and authors' own calculations

5.2.4. Leisure airline companies

Leisure airlines transport passengers to holiday destinations in a fairly similar way to how charter air companies bring passengers to a specific destination on an occasional basis. They do not operate regularly scheduled flights, which is what sets them apart from network carriers, LCCs and regional airlines.

Leisure airline companies operate a low proportion of aircraft but a relatively high proportion of passenger seats. They tend to fly larger aircraft with an average of 224 passenger seats. The size of the planes is something the leisure airline companies have in common with the largest network carriers and LCCs, with regional airlines operating much smaller aircraft.

Eight of the 20 largest leisure airlines in the EU27 are among the largest three aircrew employers in their countries: Czechia (Smartwings), Denmark (Sunclass Airlines), Greece (Ellinair), Hungary (Smartwings), Latvia (Smartlynx), Poland (Enter Air), Slovakia (AirExplore) and Spain (Air Europe). As far as information is available, only two of them – in Denmark (Sunclass Airlines) and Spain (Air Europe) – are involved in company-level bargaining. Three of them are affiliated to national employer organisations (whether sector-specific or not).

Table 40: Leisure airline companies

Member State	Company	Number of planes	% of planes in country	Average number of seats per aircraft	
BE	TUI fly	25	17	178	
DE		25	3	185	
NL		7	3	267	
SE		4	2	293	
BG	Holiday	8	15	198	
CZ	Smartwings	16	40	131	
HU		1	1	189	
PL		1	0.5	189	
SK		1	12	189	
DE	Condor	54	7	238	
DE	Sundair	5	0.6	172	
DE	Sun Express	15	2	245	
DK	Sunclass Airlines	14	12	268	
DK	Jet Time	9	8	171	
EE	Smartlynx Estonia	7	27	180	
LV		Smartlynx Latvia	7	14	207
MT		Smartlynx Malta	1	0.4	180
EL	Ellinair	4	4	162	

ES	Air Europe	44	9	253
ES	Wamos Air	12	2	376
ES	Alba Star	5	1	185
FR	Corsair	7	2	410
IT	Neos	12	5	258
IT	Blue Panorama Airlines	15	6	198
MT	Corendon Airlines	4	2	189
PL	Enter Air	21	10	189
PT	White	3	1.5	146
SK	Airexplorer	2	25	189
Total		329	About 6.5% of all aircraft in EU27	224

Source: Cirium database and authors' own calculations.

5.2.5. Cargo air transport companies

Air cargo transport companies operate about 5% of the aircraft and provide about 4% of the employment in the entire civil aviation sector. In five Member States, an air cargo company appears among the top five employers in the sector. This is the case for Belgium, Bulgaria, Hungary, Luxembourg and Slovenia. In Hungary (ALS airlines) and Luxembourg (Luxair), they are the second-largest employers of pilots, while in Belgium (ALS airlines), Bulgaria (Cargo Air) and Slovenia (Solinar) they are the third-largest employers.

Available data show that only two of them take part in collective bargaining. None of them, as far as information available, is affiliated to a national employer organisation.

Air cargo companies only transport freight, with the exception of ASL France and Poste Air Cargo, both of which have a very small number of passenger seats on board. Making up 5.2% of all European aircraft, these specialised cargo companies transport some 10% of air freight. Network carriers transport 47% of European air freight in terms of MTOW, and LCCs 18%. Part of network carriers' and LCCs' MTOW is of course passenger luggage, although, all things considered, it is clear that specialised cargo companies are, at 10%, only responsible for a relatively small proportion of the MTOW of all registered aircraft in the EU27.

These cargo companies employ pilots, but no cabin crew. For the purposes of this study, these companies are relevant in terms of the pilots and ground service workers they employ.

Table 41: Air cargo transport companies

Member State	Company	Number of planes	% of planes in country
BE	ASL Airlines (altogether 85 planes)	32	22
FR		18	4
HU		2	2
IE		33	6
BG	Cargo Air	9	17
DE	European Air Transport	41	5
DE	CargoLogic	3	0.4
DE	AeroLogic	14	2
DE	Lufthansa Cargo	15	2
DK	Star Air	14	12
FR	Airbus Transport International	6	1

IT	Poste Air Cargo	6	2.5
LU	CargoLux	25	24
IT	CargoLux Italia	4	1.5
SE	West Atlantic Sweden	16	6
SE	Babcock	1	0.4
IT		19	8
ES		1	0.2
SI		Solinair	3
SK	Air Cargo Global	3	38
Total		265	5.2% of all registered aircraft in EU27

Note: Lufthansa Cargo is not a separate company but part of the Lufthansa Group.

Source: Cirium database and authors' own calculations

5.2.6. Charter airline companies and corporate registered aircraft

In three Member States, a charter airline company is the largest employer of aircrew in the country. This is the case in Bulgaria (Bulgarian Air Charter), Lithuania (GetJet Airlines) and Slovenia (Amelia). In a number of other countries, a charter airline company is the second- or third-largest employer of aircrew, such as in Estonia (AS Fort Aero).

Charter airlines can operate larger aircraft on behalf of network carriers or leisure airlines, or cargo aircraft for cargo air transport companies. The group of charter airline companies at the top of Table 42 operate large aircraft with an average number of passenger seats between 150 and 200. Amelia (Slovenia) and Pan Européenne Air Service are two examples of charter airline companies operating aircraft with about 40–45 passenger seats. Most other charter airline companies operate aircraft with fewer than 20 passenger seats. These charter airlines offer private air transport services for business or corporate travel, as well as tourist flights or, for example, transport of tourists or patients who need to be repatriated on behalf of insurance companies.

Table 42: Sample of 35 charter airline companies

Member State	Company	Number of planes	% of planes in Member State	Average number of seats
BG	Bulgarian Air Charter	8	15	171
LT	GetJet Airlines	9	30	160
LT	Avion Express	7	23	191
RO	Just Us Air	3	5	181
RO	Star East	2	3.5	153
SI	Amelia	7	44	45
FR	Pan Européenne Air Service	2	0.5	43
AT	AVCON Jet	30	8	11
AT	Laudamotion executive	14	4	11
DK	Air Alsie	18	15	19
DE	Air Hamburg Private Jets	18	2	13
DE	MHS Aviation	10	1	14
DE	Baden Aircraft Operations	5	0.6	10
DE	Aerowest GmbH	5	0.6	8
DE	Heron Aviation	3	0.4	13
DE	ACM Air Charter Luftfahrt	7	1	9
DE	Proair-Charter-Transport GmbH	2	0.25	10

DE	FAI rent-a-jet	24	3	10
DE	Air Hamburg Private Jets	18	2	13
DE	K5-Aviation	7	1	15
DE	DC Aviation	11	1	15
DE	ACM Air Charter Luftfahrt	7	1	9
FR	Astonjet	2	0.5	8
CZ	ABS Jets	9	23	14
EE	Panaviatic	5	19	9
EE	AS Fort Aero	2	8	11
LU	Global Jet Luxembourg	48	46	16
MT	Elitavia	11	4	9
SI		6	37	13
MT	VistaJet Malta	58	23	12
NL	Exxaero	6	2.5	10
NL	JetNetherlands	5	2	20
SE	Svenskt Industriflyg AB	5	2	11
IT	Sirio spa	13	5	11
SE	EFS European Flight Service	5	2	11
BE	Luxaviation	12	8	13
DE		3	0.36	13
FR		4	1	12
LU		7	7	14
PT		7	3.5	14
Total		425	8.5% of all aircraft in EU27	33

Source: Cirium database and authors' own calculations

Charter airline companies operate an average of 12 aircraft each, and most of them have five or more registered aircraft. Corporate private aeroplane companies generally have only one or two registered aircraft, with an average of 12 passenger seats (Table 43).

Table 43: Sample group of corporate private aeroplane companies

Member State	Company	Number of planes	Average number of passenger seats per aircraft
AT	Art Aviation Flugbetrieb	5	13
BE	Exmar Marine	1	9
CY	Smart Jet Aviation Ltd	2	13
DE	BASF	2	10
DE	BMW	3	13
DE	VW Air Services	5	13
DE	Adolf Wurth GmbH	2	12
BG	AVB 2012 Ltd	1	12
CZ	CTR Flight Services Sro	1	8
EL	SeaFlight Aviation Ltd	1	14
IE	Hansel Jet Ireland Ltd	1	18
ES	Mercadona	1	12
FI	Strategic Moves	1	9
FR	Bolore	2	12
NL	Shell Aircraft	5	15
PT	Jet Capital Aviation	4	3

PT	DBT – Transportes Aereos	1	12
RO	Toyo Aviation (Toyota)	1	13
Total		39	12

Source: Cirium database and authors' own calculations

Table 44: Number of charter airline companies and corporate air transport companies

Member State	Number of charter companies	Number of corporate aviation companies	Member State	Number of charter companies	Number of corporate aviation companies
AT	15	8	IE	4	5
BE	3	3	IT	9	5
BG	3	0	LT	3	3
CY	0	9	LU	3	3
CZ	4	1	LV	1	1
DE	21	28	MT	16	10
DK	6	2	NL	2	4
EE	2	0	PL	2	4
EL	2	3	PT	6	5
ES	3	3	RO	3	2
FI	1	1	SE	4	0
FR	10	10	SI	1	1
HR	0	0	SK	2	0
HU	1	1	EU27	127	112

Source: Cirium database and authors' own calculations

Table 44 indicates that in the EU27 there were 127 charter air companies and 112 corporate aircraft companies in 2019. Combining these figures with those in Tables 42 and 43 offers an overview of what these civil aviation activities represent in relation to the sector. It can be estimated that about 20% of the registered aircraft are operated by these 139 aviation companies, mostly operating small aircraft.

5.3. Concentration as the main property of the airline business structure

In most Member States, the airline industry within the civil aviation sector is characterised by a notable concentration of activities among a relatively small number of major airline companies. The reasons for this high level of concentration are manifold. First, access to the air transport market is difficult for new players due to high start-up costs in relation to aircraft, personnel, marketing, etc. There is also limited terminal space at airport hubs. For start-ups and small airlines, trying to compete with major air carriers is risky, as the latter benefit from extensive networks enabling them to pursue a flexible pricing strategy. Moreover, incumbent airlines tend to control the use of airports and impede the ability of new airlines to obtain slots and terminal capacity.

Another reason for the concentration of activities among major airlines is the capital-intensiveness of the air transport industry in combination with increased numbers of shareholders. This has forced air carriers to merge to ensure substantial market share, which increases purchasing power and allows them to benefit from enhanced economies of scale. Finally, the national administrations, which often hold shares in the former state-controlled air carriers and their successor companies, may have a

strong interest in preserving and supporting these incumbents as strategic key companies; as could be seen during the COVID-19 pandemic, those companies tended to be the first to benefit from various forms of State aid.

5.3.1. Social partner involvement in the largest three airline employers in each Member State

Annex 4 provides information on the three largest airline companies in each of the 27 Member States. According to data provided by the Network of Eurofound Correspondents, 2 of the 15 largest corporate private aeroplane companies in the EU27 are among the largest three aviation employers: Smart Jet Aviation of Cyprus and Just Us Air of Romania. Based on the information provided, there is no indication that these corporate airlines are involved in collective bargaining or affiliated to a national employer organisation.

In 11 Member States, at least one sector-related trade union represents workers employed at the largest three airlines. This is the case in Austria, Belgium, Denmark, Finland, France, Germany, Italy, Malta, Portugal, Spain and Sweden. Other than in Portugal, at least one trade union representing workers at these companies is affiliated to one of the two European-level trade union organisations representing flight staff in the ESSDC, namely ETF and ECA. In Croatia, Czechia, Ireland, Latvia, Luxembourg, the Netherlands, Poland and Romania, one or two of the largest three airline employers have a trade union presence, often by trade unions affiliated to ETF or ECA. This is the case with Croatia Airlines of Croatia, Czech Airlines of Czechia, Ryanair and Air Lingus of Ireland, Air Baltic of Latvia, Luxair and Cargolux of Luxembourg, KLM of the Netherlands, LOT Polish Airlines of Poland and TAROM of Romania. In Bulgaria, Cyprus, Estonia, Greece, Hungary, Lithuania and Slovakia, there is no trade union representing workers at the largest three airlines (in terms of employment), or there is no information available on trade union representation in these companies.

The three largest airline employers in Austria, Belgium, Denmark, Finland and Sweden are members of employer organisations. In each of Germany and Italy, only one of the largest companies (Lufthansa of Germany and Alitalia of Italy) is a direct member of a sector-related employer organisation. In all other countries there is either no affiliation with a national employer organisation at all or an affiliation only to sector-non-specific organisations that do not act as social partners in civil aviation. The only employer organisation in the air transport subsector affiliated to a European-level social partner organisation (namely to ERA) is Transportföretagen of Sweden.

Rather, a number of the largest three airline employers are directly affiliated to one of the European-level employer organisations relevant in the air transport subsector (ENAA, AIRE, ERA and A4D). These large airline employers are listed in Table 45.

Table 45: Affiliations of largest three airline employers to ENAA, AIRE, ERA and A4D

Member State	Affiliation to ENAA	Affiliation to AIRE	Affiliation to ERA	Affiliation to A4D
AT	Austrian Airlines			
BE	Brussels Airlines	TUI Airlines (fly) Belgium		
BG				
CY			TUS Airways	
DE	Lufthansa, Eurowings	TUI fly		
DK	SAS Denmark		DAT AS	
EE				

EL				
ES				Iberia, Vueling
FI				Finnair
FR	Air France		HOP!	
HR	Croatia Airlines		Croatia Airlines	
HU			ASL Airlines	
IE				Ryanair, Aer Lingus
IT				
LT			DAT LT, Avion Express	
LU			Luxair	
LV			RAF-AVIA AS	
MT			Mediavia	
NL	KLM	TUI Group		
PL		LOT Polish Airlines		
PT	TAP		SATA, PGA	
RO			Blue AIR	
SE	SAS	TUI fly Nordic	Braathens Regional Airlines	
SI				
SK		airExplore		

Source: Network of Eurofound Correspondents, ENAA, AIRE, ERA, A4D

In most Member States, the largest employers are involved in industrial relations as they engage in company-level collective bargaining. In 11 Member States, all of the largest three airlines (in terms of employment) are involved in single-employer bargaining. These 11 countries are Austria, Belgium, Denmark, Finland, France, Germany, Italy, Malta, Portugal, Spain and Sweden. For some countries, such as Greece, Ireland, the Netherlands, Poland and Slovakia, the situation is unclear due to a lack of information on involvement in collective bargaining. In other countries (Croatia, Czechia, Latvia and Luxembourg), the situation varies among companies, with some involved in collective bargaining and others not involved. In Bulgaria, Cyprus, Estonia, Hungary and Lithuania, none of the largest employers among the airlines is involved in collective bargaining.

In a few Member States, all or at least some of the three largest employers are indirectly (through affiliation to an employer organisation) involved in sector-specific consultation procedures and social dialogue bodies, be they bipartite or tripartite. In Austria, Belgium, Denmark, Finland and Sweden, all of the three largest employers are indirectly involved in consultation practices, and all but those in Denmark are also involved in social dialogue bodies. In Germany, two of the largest employers indirectly participate in consultation procedures, and in France two of the largest indirectly take part in both consultation practices and social dialogue structures.

There are, however, no records of direct employer participation in consultation procedures and bipartite or tripartite social dialogue bodies.

5.3.2. Largest European airline companies

Table 46 lists the 20 largest airlines in the EU27, measured by both employment and number of aircraft. This is to demonstrate that a large airline licensed in a particular country is not necessarily a large employer in that country.

Table 46: 19 largest EU27 airlines, by size of workforce and aircraft fleet

By workforce					By fleet		
Airline	Member State ²¹	Total employment	Pilots	Cabin crew	Airline	Member State	Aircraft
Air France	FR	41,230	3,804	11,843	Ryanair	IE	256
Lufthansa	DE	34,754	n.a.	n.a.	Air France	FR	153
KLM	NL	25,500	2,500	9,500	Malta Air	MT	119
Iberia	ES	16,698	1,317	3,309	Lufthansa	DE	117
Alitalia	IT	11,600	1,600	3,600	KLM	NL	102
Eurowings	DE	9,255	n.a.	n.a.	Wizz Air	HU	90
TAP Air Portugal	PT	9,122	855	3,408	SAS	SE	84
Ryanair ²² (EU28 estimates)	EU 28	~ 18,000	7,500	10,500	TAP Air Portugal	PT	68
Austrian Airlines	AT	7,000	1,180	2,583	EasyJet Europe	AT	68
Finnair	FI	6,200	1,000	2,000	VistaJet Ltd	MT	59
SAS Denmark	DK	4,300	n.a.	n.a.	Vueling Airlines	ES	57
SAS	SE	3,816	560	n.a.	European Air Transport	DE	55
LOT Polish Airlines	PL	3,711	820	1,672	LOT Polish Airlines	PL	55
EasyJet Italy	IT	3,700	n.a.	n.a.	NetJets Europe	PT	53
Air Europa	ES	3,605	626	1,773	HOP!	FR	50
Vueling	ES	3,552	737	2,129	Iberia	ES	49
Brussels Airlines	BE	3,062	n.a.	n.a.	Buzz	PL	47
					Global Jet Luxembourg	LU	47

²¹ The Member State here indicates the country where the airline group is headquartered and where most of the employees are employed. The country of registration of aircraft, however, does not mean that all the employees of the airline are employed in that country. Most of the airlines are multinational companies with employees based in several Member States. This table, however, only aims to indicate the high degree of concentration of the sectoral workforce in the largest airline companies.

²² For Ryanair, there were no numbers of employees provided in the scope of this study, and where numbers were available we were not allowed to use them. Therefore, only rough estimates are available, for the EU28, including the UK, and not for the EU27 as is the case for the other airlines in the table.

HOP!	FR	2,700	700	1,000	KLM Cityhopper	NL	47
Transavia	NL	2,600	650	1,300	Alitalia	IT	42

Notes: *n.a.*, data not available. In the case of Ryanair, the total employment refers not only to direct employees, the number of pilots refers to employed and contractor pilots, and the number of cabin crew refers to employees and contract agency staff. Therefore, the figures are not directly comparable.

Source: Network of Eurofound Correspondents and Cirium database

Data are not available about all of the 20 largest employers in the air transport subsector of civil aviation. However, based on data provided by the Network of Eurofound Correspondents, there are an estimated 40,000 pilots in the EU27. It may be inferred from Table 46 that these 20 largest employers employ more than half of all EU27 pilots. The same is true of cabin crew. On the basis of data gathered by the Network of Eurofound Correspondents, there are an estimated 100,000–140,000 aircrew in the EU27, of whom roughly half are employed by the 20 largest employers.

Data shown in Table 46 relate to the country of operation rather than the company itself, which is important to note in the case of multinational players. Some of them are part of a group of airlines and (through subsidiaries or sister companies) active in a multitude of countries. Table 47 lists the largest multinational airline companies operating in the EU27, with data on total employment in each group, the size of the group's fleet and the Member States where the airline/group operates through subsidiaries/sister companies.

Table 47: Largest multinational airlines/airline groups operating in the EU27

Name of the airline company/group	Country with the group's headquarters	Number of the group's workforce	Number of the group's aircraft fleet	Member State(s) where the group has subsidiaries/sister companies
Lufthansa Group (including Lufthansa, Swiss, Austrian Airlines, Eurowings, Brussels Airlines and others)	DE	125,000 (2020)	757	AT, BE, DE, IT
Ryanair Holdings (including Ryanair, Ryanair Sun/Buzz, Lauda Europe, Malta Air)	IE	> 16,000	450	IE, MT, PL
Air France–KLM group (including HOP!, Transavia)	FR	89,000	327	FR, NL
EasyJet plc (EasyJet Switzerland, EasyJet Europe)	UK	8,000–9,000	315 (110 of them registered in EU27)	AT
Wizzair Holdings plc	JE	n.a.	121	HU
IAG (including British Airways, Iberia, Vueling, Aer Lingus, IAG Cargo)	ES	64,700	905	IE
SAS Group (including SAS Sweden, SAS Denmark, SAS Cargo Group and others)	SE	11,300	84	DK
Norwegian Group (Norwegian, Norwegian Air International, Norwegian Air Sweden)	NO	4,100	39	IE, SE

Sources: Web pages of the airline companies, 2021

The list in Table 47 is certainly not exhaustive but includes those groups of airlines (companies) employing at least 10,000 staff in the EU27, plus Norwegian with 4,100 staff. However, it is important to note that the employment figures are aggregate numbers, including all sorts of staff and occupations in both air flight and ground handling activities (where the multinationals operate the latter).

ETF has provided a list of sector-related trade unions representing workers employed by the largest multinational airline groups and their subsidiaries in each Member State (see Table 48). This table, however, shows the spread of operations of the multinationals in terms of their bases and aviation networks rather than the capacity of the national trade unions to organise the internationally operating airline companies' workforce (or the companies' willingness to accept unionism). Table 48 thus reflects the considerable network of low-cost airline groups such as Ryanair, EasyJet, Wizz Air and Norwegian (with trade union representatives in their companies/subsidiaries in 11, 6, 5 and 5 Member States, respectively), compared with the less dense aviation network of the network carrier airline groups (Lufthansa, Air France–KLM, IAG and SAS), and thus records trade union representation in only three Member States at most for the latter.

Table 48: Trade union representation of employees in largest multinational airline groups in the EU27

Member State	Lufthansa Group	Ryanair Holdings	Air France–KLM group	EasyJet plc	Wizzair Holdings plc	IAG	SAS Group	Norwegian Group
AT	Vida	Vida			Vida			
BE	ACV Puls	ACV Puls						
BG		FTTUB			FTTUB			
CY								
CZ								
DE	ver.di, UFO	ver.di		ver.di	ver.di			
DK							3F, FPU	3F, FPU
EE								
EL		RACU						
ES		SITCPLA, FS-USO, FSC-CCOO, FeSMC-UGT		SITCPLA, FS-USO, FSC-CCOO, FeSMC-UGT		SITCPLA, FSC-CCOO, FeSMC-UGT		SITCPLA, FS-USO
FI								AKT
FR		CGT, SNPNC-FO	CGT, CFDT, SNPNC-FO	CGT, CFDT, SNPNC-FO		CGT, CFDT		
HR								
HU								
IE		Forsa, SIPTU				Forsa, SIPTU	Forsa	
IT		UIL Trasporti, FILT-CGIL, FIT-CISL		UIL Trasporti, FILT-CGIL, FIT-CISL	UIL Trasporti, FILT-CGIL, FIT-CISL			UIL Trasporti, FILT-CGIL, FIT-CISL
LT								
LV								
LU								
MT		GWU						
NL			FNV, VNC	FNV, VNC				
PL		NSZZ Solidarność			NSZZ Solidarność			
PT				SNPVAC				
RO								

SE							Unionen, SPF	Unionen, SPF
SI								
SK								

Note: It is important to note that there may be trade unions active in a member of an airline group in countries where the company is not headquartered, if the airline group runs bases in those countries.

Sources: Network of Eurofound Correspondents and ETF, 2020

Table 49 shows that members of the Lufthansa Group are regularly affiliated to a national employer organisation in the country where they are headquartered. The same is true for the Air France–KLM group, the IAG Group and the SAS Group. A4D indicated that it has member companies affiliated to WKÖ-FVALS in Austria, NCADF in Ireland, ALA in Spain, Palta in Finland and AICALF in Italy (see Table 88 in section 7.2.2).

Table 49: Affiliations to national employer organisations of members of the largest multinational airline groups in the EU27

Member State	Lufthansa Group	Ryanair	Air France–KLM group	EasyJet plc	Wizzair Holdings plc	IAG	SAS Group	Norwegian Group
AT	WKÖ-FVALS (Austrian Airlines, Eurowings Europe)							
BE	BAR, BATA (Brussels Airlines)							
BG								
CY								
CZ								
DE	AGVL (Lufthansa)							
DK							DI (SAS)	
EE								
EL								
ES	ALA (Lufthansa)	ALA				ALA (Vueling, Iberia)		
FI								Palta (Norwegian)
FR			FNAM (HOP!)	none				
HR								
HU					none			
IE		NCADF				none		
IT		AICALF		none				
LT								
LV								
LU								
MT								
NL			VNO-NCW, AWWN (KLM)					
PL								
PT				none				
RO					none			
SE							Transportföretagen (SAS)	
SI								

SK								
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Note: 'none' means there is a group member headquartered in this country but not recording any affiliation to a national-level employer organisation.

Source: Network of Eurofound Correspondents, 2020

5.4. Air navigation service providers employing ATCOs, ATSEP and other ATM employees

The providers of air navigation services, which employ ATCOs, air traffic security, electricians, engineers and other air management staff,²³ are called air navigation service providers (ANSPs). There is only one ANSP in each of the 27 Member States. The Chicago Convention of 1944 obliges each state to provide ATM services in its airspace, which is regulated by the International Civil Aviation Organization (ICAO).

Within the EU, Member States are responsible for organising and controlling their airspace. The network manager plays an important role in support and in coordinating with ANSPs, and other operational stakeholders, actions to improve the capacity and the performance of European airspace.²⁴ The European Union Aviation Safety Agency (EASA) is the EU agency responsible for drafting ATM/air navigation service regulations and advising the European Commission on them, including on the design of airspace structures and the requirements for the providers of airspace management. Eurocontrol is responsible for coordinating the ANSP. Eurocontrol has no enforcing powers in this regard; it is the network manager, which conducts coordinating activities with states on how to best manage the European airspace.

Some ANSPs are government departments (purely public), as in France, Greece and Luxembourg. In other Member States, the ANSP is a public enterprise or autonomous government agency, as in Belgium, the Netherlands, Spain and Sweden. ANSPs are entirely private entities or corporatised in Austria, Croatia, Estonia, Germany, Ireland and Italy. The liberalisation of certain defined markets within air navigation services is supposed to help ANSPs adapt, innovate and expand into new markets, work collaboratively and secure rewards for better serving airline customers at competitive prices (ICAO, 2008; ATM Policy Institute, 2016). In the context of this liberalisation, ANSPs can compete to offer terminal air navigation services at a specific airport through a tender process for an exclusive contract for tower services for a fixed period. It is possible in a given Member State, then, that a small portion of the ATM workforce is employed not directly by the ANSP, but locally by a regional airport.

As already outlined in Chapter 1, ATM services include ATCOs, ATSEP and other ATM staff, such as accountants and administrative staff. All these ground-based air traffic service and ATM activities largely correspond to NACE 52.23.

ATM tasks – in particular ATC – are official duties, the fulfilment of which must be guaranteed under state supervision. In most countries, ATC services are centralised in one organisational unit and either form an integral part of the government administration or have been hived off (in some cases even

²³ For example, communication, navigation and surveillance (CNS) employees, employees providing meteorological services for operators and pilots (MET), and employees involved in search and rescue activities (SAR) are all among the other ATM employees, just like administrators, accountants and management employees.

²⁴ Eurocontrol is appointed by the European Commission to be the network manager until 2029.

privatised) and are operated as private-law companies supervised by the responsible ministry. Only in Estonia, Germany and Spain are more than one organisation responsible for ATC tasks, although there is one main provider in charge of the lion's share of ATC responsibilities. In Austria, Cyprus, Finland, Germany (at least the main operational unit, DFS), Ireland, Slovakia and Slovenia, the central ATC unit is a private-law and commercial company/agency owned by the state. In France, the Netherlands, Poland, Portugal, Romania and Sweden, ATC tasks are undertaken by a public corporate entity as a legal person under public law (Portugal) or a unit of the public administration.

Table 50: Largest ATM provider in each Member State with number and % of ATM employees

Member State	Largest ATM provider	ATM employees at this provider	% of all country's ATM employees at this provider	ATC employees at this provider	ATSEP employees at this provider	Other ATM staff at this provider
AT	Austro Control	1,107	100	327	162	618
BE	Skeyes	862	100	332	142	388
BG	BULATSA	1,121	100	311	309	501
CY	DCA (Ministry of Transport)	281	100	175	48	58
CZ	ANS CR	938	100	276	123	539
DE	DFS	5,400	n.a.	2,621	414	2,402
DK	Naviair	n.a.	100	270	6	354
EE	Air Traffic Management	190	n.a.	104	36	51
EL	HCAA	2,052	n.a.	620	407	n.a.
ES	ENAIRE	4,011	75	1,968	818	1,225
FI	ANS Finland	319	100	231	58	30
FR	DGAC	7,354	almost 100	3,469	1,321	2564
HR	Croatia Control	753	100	279	121	353
HU	HungaroControl	783	100	183	117	483
IE	IAA	650	100	300	50	300
IT	ENAV	3,781	n.a. ²⁵	1,693	486 ²⁶	1,602
LT	Oro Navigacija	291	100	n.a.	n.a.	n.a.
LU	ANA	n.a.	n.a.	n.a.	n.a.	n.a.
LV	LGS	362	100	77	59	226
MT	MATS	155	100	53	50	52
NL	LVNL	915	100	400	n.a.	n.a.
PL	PANSA	1,879	100	612	226	1,041
PT	NAV	965	almost 100	350	130	485
RO	ROMATSA	1,568	100	744	471	353
SE	LFV	982	100	500	200	282
SI	Slovenia Control	226	100	100	35	91
SK	LPS	126	100	116	n.a.	10

Note: n.a., data not available.

Sources: For Austria, Belgium, Bulgaria, Czechia, France, Hungary, Italy and Poland, CANSO, 2022, with data from December 2021; for all other Member States, Network of Eurofound Correspondents, 2020, with data from December 2019

²⁵ In Italy, the ATM employees also include personnel employed by the Italian Air Force, smaller airports providing flight information services and other companies providing ATM-related services on the market.

²⁶ In Italy, most of the ATSEP are employed by Techno Sky, a company owned by ENAV that provides maintenance services.

Table 50 shows that in the vast majority of countries the ATM provider is the only organisational unit providing ATC and related activities. According to the country reports provided by the Network of Eurofound Correspondents, only in Estonia, Germany and Spain does a pluralist system of organisations responsible for ATC tasks exist, whereas the situation in Greece and Luxembourg is not fully clear (due to a lack of information about the proportion of ATM employees the main ATM provider employs). Nevertheless, it is evident from this table that the largest provider in each of the EU27 either has a monopoly on ATM services or tends to cover the lion's share of related activities, since the largest providers employ almost 100% of each country's ATM workforce.

Table 51: ANSPs and their involvement in industrial relations, collective bargaining and social dialogue

Member State	Largest ATM provider	Trade unions organising employees	Affiliation to employer organisations	Collective bargaining involvement	Consultation by authorities	Participation in bipartite or tripartite social dialogue bodies
AT	Austro Control	Vida, GPF		SEB	yes	yes
BE	Skeyes	ACV-CSC, ABVV-FGTB, ACLVB-CGSLB	FEBETRA	MEB + SEB	no	no
BG	BULATSA	FTTUB, FTW-CL Podkrepa, BATCU		MEB + SEB	no	yes
CY	DCA (Ministry of Transport)	CYATCU, PASYDY		SEB	yes	yes
CZ	ANS CR	CZATCA, CZATSEA, PV OSD RLP CR, ZO OOPL RLP ²⁷		SEB	no	no
DE	DFS	GdF		SEB	yes	no
DK	Naviair	DATCA	DI	SEB	yes	yes
EE	Air Traffic Management	EstATCA	ELK	SEB	no	no
EL	HCAA	OSYPA		none	no	no
ES	ENAIRES	USCA, CCOO, UGT, SNCA, SPICA, OCCA, USO, CSPA	no	MEB + SEB	yes	no
FI	ANS Finland	SLJY	Palta	SEB	no	no
FR	DGAC	SNCTA, UNSA, CGT, FO, CFDT		SEB	yes	no
HR	Croatia Control	SDHKZP, CATCU		SEB	no	no
HU	Hungaro-Control	Control, IDFSZ, LIGOSZ, LIFSZ, INFO	STRATOSZ	SEB	yes	yes (FAB CE and EU level)
IE	IAA	Forsa, AHCPs		SEB	no	no
IT	ENAV	FIT-CISL, FILT-CGIL, UIL Trasporti, UGL Trasporto Aereo, UNICA	Assocontrol	MEB	n.a.	no
LT	Oro Navigacija	Union of Oro Navigacija, LATCA, Union of Kaunas Traffic Controllers		SEB	yes	no
LU	ANA	LACA		none	yes	no
LV	LGS	LADA, LAAF	LAA	SEB	no	no
MT	MATS	MATCA, GWU		SEB	yes	no

²⁷ ZO OOPL RLP is a new trade union for ATM employees created in 2021. It is, just like PV OSD RLP CR a single employer trade union that is only organising employees in ANS CR, the Czech ANSP.

NL	LVNL	VNLG		SEB	yes	yes
PL	PANSA	ZZPT, ZZPARL, NSZZ Solidarność, ZZPSRL, ZZPSPAŻP, ZZKRL, ZZKW, GZZPKRL, ZZKLW, ZZFIS, ZZPPAŻP, OZZSRL		SEB	Collective labour agreement must be approved by the Ministry of Transport	no
PT	NAV	SINCTA, SITECSA, SITAVA		SEB	no	no
RO	ROMATSA	ATSR	AAR	SEB	no	no
SE	LFV	ST, Unionen	SAGE	MEB	yes	yes
SI	Slovenia Control	SAITS, SATS, SSKL		MEB + SEB	no	no
SK	LPS	n.a.	UZvCL SR	SEB	no	no

Notes: MEB, multi-employer bargaining; SEB, single-employer bargaining.

Source: Network of Eurofound Correspondents, 2020

Table 51 indicates that at least one trade union organises the workforce, fully or in part, in all of the largest ATM providers in each Member State. Ten of the 27 largest (or only) ATM providers in each Member State are affiliated to a national employer organisation, which, however, tends to be a cross-sectoral or sector-non-specific association. However, all of the largest ATM providers in the EU27 are affiliated to CANSO at European level through direct membership, to such an extent that CANSO has full coverage in terms of countries (and almost full coverage in terms of organisations).

All but two organisations (in Greece and Luxembourg) are involved in collective bargaining, usually exclusively at company level. Twelve of the largest ATM provider organisations are consulted by authorities on sector-specific matters, and seven of them participate in bipartite or tripartite social dialogue bodies dealing with sector-specific matters.

5.5. Types of ground service providers in civil aviation

There are three categories of companies/employers providing ground services in civil aviation that play a significant role in the ground (handling) services section and in industrial relations: purely ground handling service providers; airports; and large airlines with a significant number of ground staff providing ground handling services on behalf of the airline. While ground handling service providers handle all kinds of activities at airports – passenger services (reservation and ticketing, check-in and departure control systems, arrival and departure services, boarding assistance, baggage services, etc.), ramp handling services for aircraft movements, and traffic operations – airports provide infrastructure that enables the transport of passengers and cargo, and either provide ground handling services themselves or contract them out to specialised firms. Airlines operating ground handling services do so only on behalf of their own passengers; however, in the case of big airlines, they may be among the largest employers of ground staff in a country.

5.5.1. Number of airports in each Member State

Unfortunately, a complete list of all ground service providers that includes airports, airlines with their own ground handling staff and ground handling companies could not be found for the EU27. However, the European Commission's communication concerning the procedure laid down by Article 1, paragraph 4, of Council Directive 96/67/EC compiles a list of all airports in the EU27 as of October 2019. Although not all airports may provide airport-related ground services on their own but some may

contract out such services or part of them to third parties, it can be assumed that at least the larger airports do provide at least subareas of these services.

Table 52: List of airports identified by the European Commission in 2019

Member State	Airports whose annual traffic was more than two million passenger movements or 50,000 tonnes of freight in 2018	Number of smaller airports open to commercial traffic in 2018	Total number of airports open to commercial traffic in 2018
AT	Vienna International	5	6
BE	Brussels, Brussels South Charleroi, Liège	3	6
BG	Sofia, Burgas, Varna	2	5
CY	Larnaca International, Paphos International	0	2
CZ	Prague	73	74
DE	Berlin Tegel, Berlin Schönefeld, Bremen, Dortmund, Düsseldorf, Frankfurt, Hahn, Hamburg, Hannover, Cologne Bonn, Leipzig/Halle, Munich, Nuremberg, Stuttgart	25	39
DK	Copenhagen, Billund	7	9
EE	Tallinn	4	5
EL	Athens International, Heraklion, Thessaloniki, Rhodes, Corfu, Chania, Kos, Santorini	31	39
ES	Madrid–Barajas, Alicante-Elche, Barcelona-El Prat, Bilbao, Fuerteventura, Girona, Gran Canaria, Ibiza, Lanzarote, Málaga-Costa del Sol, Menorca, Palma de Mallorca, Santiago, Seville, Tenerife Norte, Tenerife Sur, Valencia, Vitoria, Zaragoza	31	50
FI	Helsinki-Vantaa	23	24
FR	Paris Charles de Gaulle, Paris-Orly, Nice Côte d’Azur, Lyon-Saint Exupéry, Toulouse-Blagnac, Marseille Provence, Basel Mulhouse Freiburg, Bordeaux-Mérignac, Nantes Atlantique, Beauvais-Tillé, La Réunion Roland Garros, Pointe-à-Pitre Le Raizet, Lille-Lesquin	48	61
HR	Zagreb, Split, Dubrovnik	6	9
HU	Budapest International Airport	6	7
IE	Dublin, Cork	5	7
IT	Rome-Fiumicino, Milan Malpensa, Bergamo, Venice, Naples, Catania, Milan Linate, Bologna, Palermo, Rome Ciampino, Pisa, Bari, Cagliari, Turin, Verona, Treviso, Olbia, Lamezia Terme, Florence, Brindisi	22	42
LT	Vilnius International	3	4
LU	Luxembourg	0	1
LV	Riga International	1	2
MT	Malta International	0	1
NL	Amsterdam Schiphol, Eindhoven, Maastricht Aachen	2	5
PL	Warsaw Chopin, Kraków, Gdańsk Lecha Wałęsa, Katowice-Pyrzowice, Warsaw Modlin, Wrocław-Strachowice, Poznań-Ławica	7	14
PT	Lisbon, Porto, Faro, Madeira	16	20
RO	Bucharest Airport Otopeni, Cluj International	15	17
SE	Stockholm Arlanda, Gothenburg Landvetter, Stockholm Bromma, Stockholm Skavsta, Malmö	33	38
SI	none	3	3
SK	Bratislava	5	6
EU27	120	376	496

Note: Airports with annual traffic under 10,000 passengers have not been taken into account in France and Germany.

Source: European Commission, 2019, and own calculations

Table 52 indicates that there are at least 500 airports in the EU27 (the smaller airports of France and Germany are not included in this table), of which 120 recorded annual traffic exceeding two million passenger movements or 50,000 tonnes of freight in 2018. Whereas the number of commercial airports in the EU27 is particularly high in Czechia, France, Germany, Greece, Italy, Spain and Sweden, with 38 or more airports in each of these countries, there is a small group of large Member States that are home to more than 10 large airports (with more than two million passenger movements or 50,000 tonnes of freight in 2018): France, Germany, Italy and Spain.

5.5.2. Airline companies providing ground services

A number of airline companies that mainly employ aircrew also employ a number of ground service staff working in commercial services, management, ticketing, check-in and boarding, or other ground services.

Examples of airlines that have a significant number of ground service employees are AIG, Group Air France, Aer Lingus and Ryanair, KLM, Lufthansa and SAS. As some of the major airline groups have a significant number of employees in several EU Member States, they operate as employers of ground service employees in many EU Member States.

5.5.3. Specialised ground service providers in airports

There are no official data available on ground service providers in the EU27. A list of ground handlers in about half of the Member States in 2014, provided by ETF, indicates that there are many different ground handling companies in most countries, depending on the size of the Member State and the number of airports. In some countries, such as Denmark and Sweden, the airport (or a subsidiary) is often also the (main) ground handling provider. Moreover, in some countries, a large airline's airport hub acts as the main handling company (such as Air France at Paris Charles de Gaulle and Nice Côte d'Azur, or Iberia at a number of Spanish airports).

In most countries and at most airports, however, specialised handling companies serve the airports and the airlines. These specialised handlers can serve just one or a few airports in a certain country (such as Airpro of Finland or Lesma of Spain), or they can be large multinational players engaged at many airports in several different countries (such as Aviapartner, Menzies, Swissport or Worldwide Flight Services (WFS)). Table 53 gives a tentative overview of the number and (predominant) type of ground service providers in a limited number of Member States based on incomplete ETF data from 2014.

Table 53: Number and type of ground (handling) service providers in each Member State, 2014

Member State	Minimum number of ground service providers	Predominant types of companies operating	Most important providers in the country
AT	n.a.	Airports, airlines, national handlers, multinational handlers	Vienna International Airport Handling Services
BE	17	Airports, airlines, national handlers, multinational handlers	Aviapartner, Swissport
BG	4	Airports, multinational handlers	Fraport
CY	n.a.	n.a.	n.a.
CZ	n.a.	National handlers, multinational handlers	n.a.

DE	60	Airports, airlines, national handlers, multinational handlers	Aviapartner, Swissport
DK	7	Airports, national handlers, multinational handlers	n.a.
EE	n.a.	n.a.	n.a.
EL	n.a.	n.a.	n.a.
ES	17	Airlines, national handlers, multinational handlers	AGA, Groundforce, Iberia, Lesma, Menzies, Swissport
FI	9	Airlines, national handlers, multinational handlers	Airpro, RTG
FR	11	Airlines, national handlers, multinational handlers	Aviapartner, WFS
HR	n.a.	n.a.	n.a.
HU	6	National handlers, multinational handlers	n.a.
IE	n.a.	n.a.	n.a.
IT	20	Airlines, national handlers, multinational handlers	Aviapartner
LT	n.a.	n.a.	n.a.
LU	3	Airports, airlines, multinational handlers	n.a.
LV	n.a.	n.a.	n.a.
MT	n.a.	n.a.	n.a.
NL	4	Multinational handlers	Aviapartner
PL	n.a.	n.a.	n.a.
PT	2	National handlers, multinational handlers	Portway
RO	n.a.	n.a.	n.a.
SE	16	Airports, national handlers, multinational handlers	Swedavia
SI	n.a.	n.a.	n.a.
SK	n.a.	n.a.	n.a.

Note: Data available only for some Member States; the table indicates the minimum number of ground service providers as the completeness of the data is unclear; reference year is 2014.

Source: ETF, 2014, and own research

The IATA (International Air Transport Association) Ground Handling Partner Directory records all members of the IATA Ground Handling Programme, including ground service providers, airports and (non-IATA) airlines engaged in ground handling services worldwide.²⁸ The directory lists 49 ground handling partners in Europe in 2021, both those of national significance and multinational players such as Acciona Airport Services (based in Spain), Aviapartner (based in Belgium), Fraport (based in Germany), Menzies (based in the UK), Swissport International (based in Switzerland) and WFS (based in France). We will look at these multinational players in more detail below.

While the impact of the COVID-19 pandemic on the entire civil aviation sector, including airports and ground handling activities is evident (see Chapter 1), it is not yet entirely clear how many European airports and ground handling providers declared bankruptcy due to the crisis. According to the news

²⁸ The directory is a database available at <https://www.iata.org/en/publications/directories/ghp-directory/>

outlet Politico, in October 2020 nearly 200 airports were at risk of closure, in particular smaller and regional airports. However, it remains unclear how many of them actually filed for insolvency and/or closed down their activities. The same is true of ground handling providers.

5.6. Largest employers of ground service employees

Table 54 identifies the three largest employers of airport ground staff in each Member State, irrespective of whether these are specialised handlers, airports or airlines. The table also provides information on trade union representation in the companies, their affiliation to national employer organisations, and whether and which kind of collective bargaining is applicable.

Table 54: Largest three employers of ground staff in civil aviation in each Member State

Member State	Largest three employers of ground staff	Total employees	Ground staff employed	Trade unions organising employees in the company	Affiliations to employer organisations	Type of collective bargaining applicable
AT	Vienna International Airport	3,060 FTEs	3,060 FTEs	Vida, GPA-djp	WKÖ-FVALS	MEB
AT	Salzburg Airport	364	364	Vida, GPA-djp	WKÖ-FVALS	MEB
AT	Graz Airport	200	200	Vida, GPA-djp	WKÖ-FVALS	MEB
BE	SGS Belgium	1,282	n.a.	ACV-CSC, ABVV-FGTB, ACLVB-CGSLB	WF-BE, UPTR, FEBETRA	MEB + SEB
BE	General Services Antwerp	1,160	n.a.	ACV-CSC, ABVV-FGTB, ACLVB-CGSLB	WF-BE, UPTR, FEBETRA	MEB + SEB
BE	Lineas Group	1,000	n.a.	ACV-CSC, ABVV-FGTB, ACLVB-CGSLB	WF-BE, UPTR, FEBETRA	MEB + SEB
BG	Sofia Airport	n.a.	n.a.	FTTUB, FTW-CL Podkrepa	none	SEB
BG	Burgas Airport	n.a.	n.a.	FTTUB, FTW-CL Podkrepa	none	n.a.
BG	Varna Airport	n.a.	n.a.	FTTUB, FTW-CL Podkrepa	none	n.a.
CY	Swissport Cyprus	792	792	OYIK-SEK, PASEY-PEO, SYCHTHEM-DEOK	none	SEB
CY	LGS Handling	750	750	OYIK-SEK, PASEY-PEO, SYCHTHEM-DEOK	none	SEB
CY	Hermes Airports	160	160	n.a.	none	n.a.
CZ	Prague Airport	2,869	3,004	some small company trade unions	SP CR	SEB
CZ	Czech Airlines Technics	807	n.a.	n.a.	none	SEB
CZ	Menzies Aviation	750	750	none	none	none
DE	Fraport	19,000	16,000	ver.di, dbb	VKA, BDSW, BDLS	MEB
DE	FraSec	4,200	4,200	ver.di, dbb	BDSW, BDLS	MEB
DE	AeroGround	2,800	2,800	ver.di, dbb	VKA, BDSW, BDLS	MEB
DK	SAS Ground Handling	1,800	1,800	HK Privat, 3F	DI	MEB + SEB
DK	Aviator Services	n.a.	n.a.	HK Privat, 3F	DI	MEB + SEB
DK	Skyways Technics	100	100	Dansk Metal	DI	MEB + SEB
EE	Tallinn Airport	383	n.a.	ETTA	ELK	none
EE	AS Tallinn Airport GH	299	299	ETTA	ELK	none
EE	Air Traffic Management	225	n.a.	EstATCoA	ELK	SEB
EL	Goldair	3,500	n.a.	n.a.	SETE	SEB

Member State	Largest three employers of ground staff	Total employees	Ground staff employed	Trade unions organising employees in the company	Affiliations to employer organisations	Type of collective bargaining applicable
EL	Skyserv	n.a.	n.a.	n.a.	n.a.	none
EL	Swissport	n.a.	n.a.	n.a.	n.a.	none
ES	Iberia Airport Services	7,300	7,300	CCOO, UGT, USO	ASEATA	MEB
ES	Groundforce	4,437	4,437	CCOO, UGT	ASEATA	MEB
ES	Swissport	1,806	1,806	CCOO, UGT, USO	none	MEB
FI	Swissport Finland	2,000	1,400	IAU, JHL, Pro	Palta	MEB
FI	Finnair	6,200	1,100	n.a.	Palta	MEB + SEB
FI	Airpro	1,150	900	IAU, JHL, Pro	Palta	SEB
FR	Groupe Air France	41,230	29,202	FO-SNPNC, CFDT-UNPNC, CFE-CGC-UNAC, UNSA Aérien, CGT, SNGAF, SNPL, SUD Aérien, SPAF, ALTER, CFTC, CAT	FNAM	SEB
FR	Groupe ADP	6,410	6,410	CGT, UNSA, FO, CFDT, CAT, SUD, CFE-CGC	UAF	none
FR	Servair	8,151	8,151	n.a.	FNAM	MEB + SEB
HR	Croatia Airlines	959	200	ORCA, SHSZUZ, SKOZ, HSPP	HUP	SEB
HR	Zagreb Airport	800	250	SRAZ	none	SEB
HR	Split Airport	600	200	NSSZLKS	none	SEB
HU	Budapest International Airport	1,400	838	RÜDSZ	MVVLSZ	none
HU	Celebi Ground Handling Hungary	714	714	RÜDSZ	MVVLSZ	none
HU	Aeroplex	510	510	RMFSZ	MVVLSZ	SEB
IE	daa plc	3,500	3,500	SIPTU, Forsa, Mandate, Connect, Unite	none	SEB
IE	Aer Lingus	5,199	2,596	Forsa, SIPTU, Connect, Unite	none	SEB
IE	Ryanair	1,876	1,433	Forsa	none	SEB
IT	Alitalia	11,600	6,400	FIT-CISL, FILT-CGIL, UIL Trasporti, UGL Trasporto Aereo, ANPAV, ANPAC, USB	Assaereo	MEB + SEB
IT	Aeroporti di Roma	2,605	2,605	FIT-CISL, FILT-CGIL, UIL Trasporti, UGL Trasporto Aereo, USB	Assaeroporti	MEB + SEB
IT	Società Esercizi Aeroportuali	1980	1980	FIT-CISL, FILT-CGIL, UIL Trasporti, UGL Trasporto Aereo, USB	Assaeroporti	MEB + SEB
LT	FL Technics	890	n.a.	none	none	none
LT	Lithuanian Airports	655	n.a.	none	none	none
LT	Litcargus	368	368	none	none	none
LU	Luxair	1,670	1,228	OGBL, NGL-SNEP	none	SEB
LU	Luxembourg Airport	300	n.a.	OGBL, LCGB	none	SEB
LU	ANA	n.a.	n.a.	LACA	none	none

Member State	Largest three employers of ground staff	Total employees	Ground staff employed	Trade unions organising employees in the company	Affiliations to employer organisations	Type of collective bargaining applicable
LV	Riga International Airport	1,273	n.a.	LAAF	LAA	SEB
LV	Haval Latvia SIA	345	n.a.	LAAF	LAA	none
LV	ALS	54	n.a.	none	LAA	none
MT	Air Malta	1,200	450	n.a.	MEA	SEB
MT	Malta International Airport	n.a.	n.a.	n.a.	n.a.	SEB
MT	Aviaserve	500	500	n.a.	n.a.	SEB
NL	KLM	30,000	14,000	FNV, CNV, De Unie, NVLT, VKP	none	SEB until 2018
NL	Swissport	1,500	1,500	FNV	WPBL	SEB
NL	DNATA BV	700	700	FNV, De Unie	none	SEB
PL	LS Airport Services	3,000	3,000	KP OPZZ	none	none
PL	Welcome Airport Services	2,500	2,500	NSZZ Solidarność	none	none
PL	PPL	1,700	1,700	NSZZ Solidarność	none	none
PT	TAP	8,145	3,233	SITAVA, SITEMA, SINTAC, STHA, SQAC, SIMA, SICONT, STTAMP, STAMA ²⁹	RENA	MEB + SEB
PT	Groundforce	2,626	2,626	SITAVA, STHA, STTAMP, STAMA	AESH	MEB + SEB
PT	Portway	1,864	1,864	SITAVA, SINDAV, STHA, SIMAMEVIP	none	SEB
RO	Bucharest Airport Otopeni	1,500	n.a.	SAHC	AAR	SEB
RO	Globe Ground Romania	550	550	SLHA	none	none
RO	Cluj Airport	331	n.a.	SIAC	AAR	SEB
SE	SAS	3,816	~ 2,000	Unionen, ST	Transportföretagen	MEB
SE	Swedavia	3,231	3,231	Unionen, SEKO, Transport	ALMEGA	MEB
SE	Aviator Airport Service	626	626	Transport, SEKO	Transportföretagen	MEB
SI	Fraport Slovenija	456	320	SSAL, SAL, SPGAE	GZS, ZDS	SEB
SI	Portorož Airport	< 20	n.a.	none	none	none
SK	BTS	611	611	IOZ	UZvCL SR	MEB + SEB
SK	LPS	500	380	MOZRLP SR	UZvCL SR	SEB
SK	TAT	62	62	IOZ	UZvCL SR	MEB + SEB

Notes: FTE, full-time equivalent; MEB, multi-employer bargaining; n.a., data not available; SEB, single-employer bargaining.

Source: Network of Eurofound Correspondents, 2020

While ground handlers may operate transnationally, most providers identified by ETF from 2014 serve either only one or several airports in a single country. In some cases – such as AGA, Groundforce and Lesma of Spain, Airpro and RTG of Finland, and Swedavia of Sweden – ground service providers operate

²⁹ SICONT and STAMA are organising employees of TAP that are working in activities that are not considered as part of the civil aviation sector, and therefore not included in the scope of this study.

at more than 10 airports in a country, sometimes at several dozen airports. Strikingly, relatively few multinational ground handling companies serve airports in more than one Member State.

Only six European-based multinational ground handlers could be identified operating in at least two Member States: Acciona, Aviapartner, Fraport, Menzies, Swissport and WFS (Table 55). While Acciona is a multi-industry company specialising in construction and real estate, with sideline activities in ground handling in Spain and Germany, all other multinational ground handlers have their core activities in aviation services and operate in at least four Member States. Through their numerous subsidiaries, Menzies and Swissport report carrying out activities in far more than 10 Member States each.

Table 55: Largest multinational (groups of) ground handlers in terms of workforce in the EU27, UK and Switzerland

Service provider	Country where headquartered	Worldwide workforce	Airports served in EU27	Member States with subsidiaries/sister companies
Acciona	ES	n.a.	≥ 5	DE, ES
Aviapartner	BE	7,000	37	BE, DE, ES, FR, IT, NL
Fraport	DE	21,164	18	BG, DE, EL, SI
Menzies	UK	23,000	≥ 32	CY, CZ, DE, DK, EL, ES, FR, HU, IT, NL, PL, PT, RO, SE
Swissport	CH	45,000-66,000	79	AT, BE, BG, CY, DE, DK, ES, FI, FR, IE, LU, NL, RO
WFS	FR	22,200	47	BE, DE, DK, ES, FR, IE, IT, NL

Note: *n.a.*, data not available.

Source: *Individual companies' websites and ETF*

5.7. Ground service providers as industrial relations actors

Table 56: Trade union representation of employees in multinational (groups of) ground handling companies in the EU27

Member State	Acciona	Aviapartner	Fraport	Menzies	Swissport	WFS
AT					n.a.	
BE		n.a.			n.a.	n.a.
BG			n.a.		n.a.	
CY				n.a.	OYIK-SEK, PASEY-PEO, SYCHTHEM-DEOK	
CZ				none		
DE	n.a.	n.a.	ver.di, dbb	n.a.	n.a.	n.a.
DK				n.a.	n.a.	n.a.
EE						
EL			n.a.	n.a.	n.a.	
ES	n.a.	n.a.		n.a.	CCOO, UGT, USO	n.a.
FI					IAU, JHL, Pro	
FR		n.a.		n.a.	n.a.	n.a.
HR						
HU				n.a.		
IE					n.a.	n.a.

Member State	Acciona	Aviapartner	Fraport	Menzies	Swissport	WFS
IT		n.a.		n.a.		n.a.
LT						
LU					n.a.	
LV						
MT						
NL		n.a.		n.a.	FNV	n.a.
PL				n.a.		
PT				n.a.		
RO				n.a.	n.a.	
SE				n.a.		
SI			SSAL, SAL, SPGAE			
SK						

Note: n.a., data not available for countries where a subsidiary/sister company exists.

Source: Network of Eurofound Correspondents, 2020

Table 57: Employer organisation affiliation of multinational (groups of) ground handling companies in the EU27

Member State	Acciona	Aviapartner	Fraport	Menzies	Swissport	WFS
AT					n.a.	
BE		n.a.			n.a.	n.a.
BG			n.a.		n.a.	
CY				n.a.	none	
CZ				none		
DE	n.a.	n.a.	VKA, BDSW, BDLS	n.a.	n.a.	n.a.
DK				n.a.	n.a.	n.a.
EE						
EL			n.a.	n.a.	n.a.	
ES	n.a.	n.a.		n.a.	none	n.a.
FI					Palta	
FR		n.a.		n.a.	n.a.	n.a.
HR						
HU				n.a.		
IE					n.a.	n.a.
IT		n.a.		n.a.		n.a.
LT						
LU					n.a.	
LV						
MT						
NL		n.a.		n.a.	WPBL	n.a.
PL				n.a.		
PT				n.a.		
RO				n.a.	n.a.	
SE				n.a.		
SI			GZS, ZDS			

Member State	Acciona	Aviapartner	Fraport	Menzies	Swissport	WFS
SK						

Note: *n.a.*, data not available for countries where a subsidiary/sister company exists

Source: Network of Eurofound Correspondents, 2020

Table 58: Affiliations of largest ground service employers to ACI Europe, ERA, ASA, AIRE, ENAA and A4D

Member State	ACI Europe	ERA	ASA	AIRE	ENAA	A4D
AT	Vienna International Airport, Salzburg Airport, Graz Airport	Salzburg Airport				
BE						
BG	Sofia Airport, Burgas Airport, Varna Airport					
CY			LGS Handling			
CZ	Letiště Praha					
DE						
DK		Skyway Technics				
EE	Tallinn Airport		Tallinn Airport			
EL			Goldair			
ES						Iberia
FI						Finnair
FR	Groupe ADP				Groupe Air France	
HR	Zagreb Airport, Split Airport	Croatia Airlines			Croatia Airlines	
HU	Budapest International Airport					
IE	daa					Ryanair, Aer Lingus
IT						
LT	Lithuanian Airports					
LU	Luxembourg Airport	Luxair				
LV	Riga International Airport					
MT	Malta International Airport		Aviaserve			
NL			Swissport, Dnata		KLM	
PL			Welcome Airport Services			
PT			Portway		TAP	
RO	Bucharest Airport Otopeni, Cluj International Airport					
SE	Swedavia				SAS	
SI	Fraport					
SK						

Source: Network of Eurofound Correspondents, 2020

6. Representativeness of European trade union organisations

This chapter presents a detailed assessment of the representativeness of each European-level social partner organisation involved in the ESSDC for the civil aviation sector.

The representativeness of the social partners is assessed in three ways. First, the membership density of the European-level social partner organisations on both sides of the industry is described, based on the collective coverage of their national affiliates. Second, if and to what extent nationally affiliated organisations participate in industrial relations at the federal level is assessed. Third, the capacity to negotiate at European level on behalf of the nationally affiliated organisations is analysed; this is their ability to commit themselves on behalf of their members and to conclude binding agreements or actions that can be implemented or monitored EU-wide. This capacity to negotiate is affected by the involvement of their affiliates in collective bargaining at national level, which ensures not only that they can provide an effective mandate for discussion and negotiation at European level but also that they are able to implement European-level agreements.

This chapter analyses the representativeness of the three European trade union organisations participating in the ESSDC: ETF, ETC and ATCEUC. In Chapter 7 a similar analysis is made of the seven European employer organisations participating in the ESSDC. These are ENAA, A4D, ERA, AIRE, ASA, ACI Europe and CANSO.

In Chapter 8 the collective representativeness of all these European social partner organisations together is presented. The limits of the representativeness of social partners involved in the ESSDC for the civil aviation sector are assessed through comparison with the representativeness of other European associations and by measuring the representativeness of all the national organisations that are not represented by the organisations involved in the ESSDC. Through its affiliated organisations, ETF represents workers in all types of civil aviation activities. Of the 166 aviation sector trade unions, 63 are affiliated to ETF. Trade unions affiliated to ETF are present in 23 of the 27 EU Member States. There is no EFT-affiliated trade union in Cyprus, Latvia, Lithuania or Slovakia. ETF has affiliated trade unions involved in sector related collective bargaining in 21 Member States. Its affiliated trade unions in Greece and Slovenia are not involved in sectoral collective bargaining.

First, the sectoral representation of ETF-affiliated trade unions will be assessed for all three subsectors together, and then for each of the three subsectors separately in subsections 6.1.2, 6.1.3 and 6.1.4. In subsection 6.1.5 the ETF member unions will be situated in the social partner landscape at national level, while subsection 6.1.6 will document ETF's capacity to negotiate at European level.

6.1. ETF membership domain covering aircrew, ATM staff and ground handling staff

Table 59 presents an overview of ETF's membership strength in each of the different activities of the aviation sector. As ETF organises all parts of the aviation sector, with members in other transport sectors too, its membership domain is overlapping. ETF organises trade unions in all transport modes, in three different departments, including civil aviation (air transport department), but also road transport and rail transport (land transport department), and maritime and inland waterway transport and sea fisheries (water transport department). Thus ETF represents, according to its website, more

than five million transport workers from more than 200 transport trade unions in 41 European countries, including the EU27. Below the table a detailed analyses will be made of the representativeness of ETF in each of the different parts of the aviation sector.

A comparison with Table 10 indicates that, relatively speaking, ETF is the strongest because it represents 35 of the 51 (69%) trade unions organising cabin crew. In addition, more than half of the trade unions organising ground handling employees (57%), and ATSEP and other ATM employees (58%), are affiliated to ETF. The ground handling employees are represented through affiliated trade unions in 21 Member States. For ATSEP and other ATM employees this is the case in 19 Member States, for ATCOs and cabin crew in 15 Member States, and for pilots in nine Member States.

Table 59: ETF membership domain and composition in the aviation sector, 2019–2020

Member State	Trade union	NACE codes/occupations covered					EU-level affiliation				Collective bargaining involvement
		Pilots 51.10 51.21	Cabin crew 51.10	ATCOs 52.23	ATSEP and ATM 52.23	Ground handling 52.23	ETF	ECA	EurECCA	ATCEUC	
ETF TUs	63 ETF TUs in 22 MSs	19 in 10 MSs (39%)	35 in 19 MSs (69%)	27 in 15 MSs (46%)	35 in 19 MSs (57%)	46 in 21 MSs (53%)	Most of the ETF member trade unions are only affiliated to ETF. Exceptions are 3 trade unions, 1 in BE, 1 in FI and 1 in IE, that are also members of ATCEUC and 2 trade unions that are also members of ECA, one in DK and in in LU.				57 in 21 MSs
All TUs	166 in 27 MSs	50 in 20 MSs	51 in 21 MSs	55 in 26 MSs	60 in 24 MSs	89 in 27 MSs					148 in 27 MSs
% of TUs	38	38	69	49	58	52					39
% of MSs	81	45	71	58	89	78					78
AT	Vida	yes	yes	yes	yes	yes	yes				MEB + SEB
AT	GPA			yes	yes		yes				SEB
BE	ABVV-FGTB BTB-UBT				yes	yes	yes				MEB + SEB
BE	BBTK-SETCa	yes	yes	yes	yes	yes	yes				MEB + SEB
BE	ACLVB-CGSLB	yes	yes	yes	yes	yes	yes				MEB + SEB
BE	ACV-CSC Transcom ³⁰		yes	yes	yes	yes	yes			yes	MEB + SEB
BE	ACV Puls	yes	yes	yes	yes	yes	yes				MEB + SEB
BG	FTTUB ³¹		yes	yes	yes	yes	yes				SEB
BG	FTW-CL Podkrepa			n.a.	n.a.	n.a.	yes				SEB

³⁰ ACV-CSC Transcom has members in all sectors. The ATC workers are jointly represented by ATCEUC and by ETF, but the pilots are affiliated through BECA (ECA member) and have not declared their affiliation to ETF. The trade union organises has cabin crew members in TUI.

³¹ FTTUB has cabin crew members in Bulgaria Air.

Member State	Trade union	NACE codes/occupations covered					EU-level affiliation				Collective bargaining involvement
		Pilots 51.10 51.21	Cabin crew 51.10	ATCOs 52.23	ATSEP and ATM 52.23	Ground handling 52.23	ETF	ECA	EurECCA	ATCEUC	
CZ	OSD ³²		yes		yes	yes	yes				SEB
CZ	CZATCoA			yes	yes		yes				SEB
CZ	PV OSD				yes		(yes)				SEB
DE	ver.di	yes	yes	yes	n.a.	yes	yes				MEB + SEB
DK	HK Privat				yes	yes	yes				MEB + SEB
DK	3F					yes	yes				MEB + SEB
DK	Dansk Metal					yes	yes				n.a.
DK	FPU	yes	yes				yes	yes			MEB + SEB
DK	CUD		yes				yes				
EE	ETTA	yes	yes	yes	yes	yes	yes				SEB
EE	EstATCoA			yes			yes				SEB
EL	OSYPA				yes	yes	yes				
ES	FSC-CCOO	yes	yes	yes	yes	yes	yes				MEB + SEB
ES	FeSMC-UGT	yes	yes	yes	yes	yes	yes				MEB + SEB
ES	FS-USO	yes	yes	yes	yes	yes	yes				MEB + SEB
ES	SITCPLA		yes				yes				SEB
FI	IAU					yes	yes				MEB
FI	Pro		yes			yes	yes				MEB + SEB
FI	JHL				yes	yes	yes				MEB + SEB
FI	SLJY			yes			yes			yes	SEB
FI	AKT/SLSY		yes				yes				MEB
FR	USAC			yes	yes		(yes)				SEB
FR	FGTE-CFDT	yes		yes	yes	yes	yes				MEB + SEB
FR	UNSA Transport		yes	yes	yes	yes	yes				MEB + SEB
FR	CGT Transports	yes	yes		yes	yes	yes				MEB + SEB
FR	CGT Service Public				yes	yes	yes				MEB + SEB
FR	FGT CFTC	yes	yes			yes	(yes)				SEB

³² OSD has a small membership of Czech Airlines and Ryanair cabin crew.

Member State	Trade union	NACE codes/occupations covered					EU-level affiliation				Collective bargaining involvement
		Pilots 51.10 51.21	Cabin crew 51.10	ATCOs 52.23	ATSEP and ATM 52.23	Ground handling 52.23	ETF	ECA	EurECCA	ATCEUC	
FR	SNPNC (FO) (part of FEETS-FO)*		(yes)			(yes)	as of 2022		until 2020		(MEB + SEB)
FR	FEETS-FO		yes			yes	yes				MEB + SEB
HR	SKOZ		yes				(yes)				SEB
HU	RDSZSZ					yes	yes				
HU	RMFSz					yes	yes				SEB
HU	LESZ ³³	yes	yes		yes	yes	yes				
HU	Control MLISZ			yes			yes				SEB
IE	SIPTU		yes			yes	yes				SEB
IE	Forsa		yes	yes	yes	Yes	yes			yes	SEB
IT	FIT-CISL	yes	yes	yes	yes	yes	yes				MEB + SEB
IT	FILT-CGIL	yes	yes	yes	yes	yes	yes				MEB + SEB
IT	UIL Trasporti	yes	yes	yes	yes	yes	yes				MEB + SEB
LU	SAC-OGBL	yes	yes	yes	yes	yes	yes				SEB
LU	LCGB			yes	yes	yes	yes				SEB
LU	ALPL-LCGB	yes	yes				yes	yes			SEB
MT	GWU		yes		yes	yes	yes				SEB
MT	UCC		yes				yes				SEB
NL	FNV Luchtvaart				yes	yes	yes				SEB
NL	CNV Vakmensen					yes	yes				SEB
NL	FNV Cabine		yes				yes				SEB
PL	KSPTLiOL				yes	yes	yes				SEB
PL	ZZPPiL		yes				yes				
PT	SITAVA				yes	yes	yes				MEB + SEB
RO	SNTT			yes		yes	yes				SEB
SE	Unionen		yes			yes	yes				MEB
SE	SEKO					yes	yes				MEB
SE	STF					yes	yes				MEB
SE	ST			yes	yes	³⁴	yes				MEB

³³ In the feedback process of this study, LESZ informed ETF that it has both pilots and cabin crew in its membership. This was not confirmed by the Eurofound national correspondent.

³⁴ ETF reported that ST only organises ATC/ATM in the transport sector.

Member State	Trade union	NACE codes/occupations covered					EU-level affiliation				Collective bargaining involvement
		Pilots 51.10 51.21	Cabin crew 51.10	ATCOs 52.23	ATSEP and ATM 52.23	Ground handling 52.23	ETF	ECA	EurECCA	ATCEUC	
SI	SDPZ ³⁵										

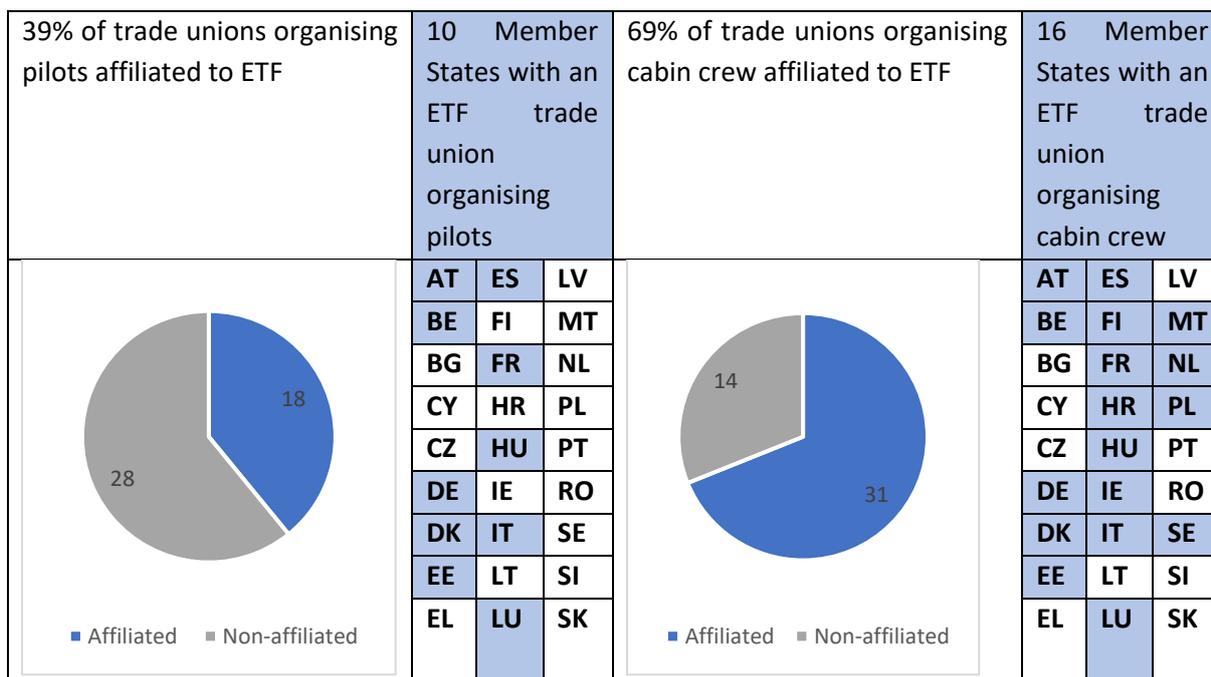
Notes: MEB, multi-employer bargaining; MS, Member State; SEB, single-employer bargaining; TU, trade union. Green cells indicate a positive response. Affiliations in parentheses mean indirect membership via higher- or lower-order units. Dark blue cells indicate involvement in sector-related multi-employer bargaining (sometimes in combination with single-employer bargaining), whereas light blue cells indicate involvement in only single-employer bargaining related to the sector. * The French trade union SNPNC (FO) is part of FEETS-FO and, as such, listed in this report. SNPNC informed us that it had decided to become a member of ETF in the course of 2021. As this has not yet happened, it was included in the table but not counted in the totals.

Source: Network of Eurofound Correspondents, 2020

6.1.1. ETF-affiliated trade unions organising aircrew

Of the 47 trade unions that organise pilots in 10 Member States, 19 (39%) are ETF affiliated. Among the 46 trade unions that organise cabin crew across 16 Member States, 32 (69%) are ETF affiliated. These trade unions are listed in the table above and visualised in blue in Figure 18, on the left for the pilots and on the right for the cabin crew.

Figure 18: ETF-affiliated trade unions organising pilots and cabin crew, 2019–2020



Source: Table 59 and 128

ETF member unions organise employees at the three largest airline companies in nine Member States: Austria, Belgium, Denmark, Finland, France, Germany, Italy, Spain, and Sweden. The companies in

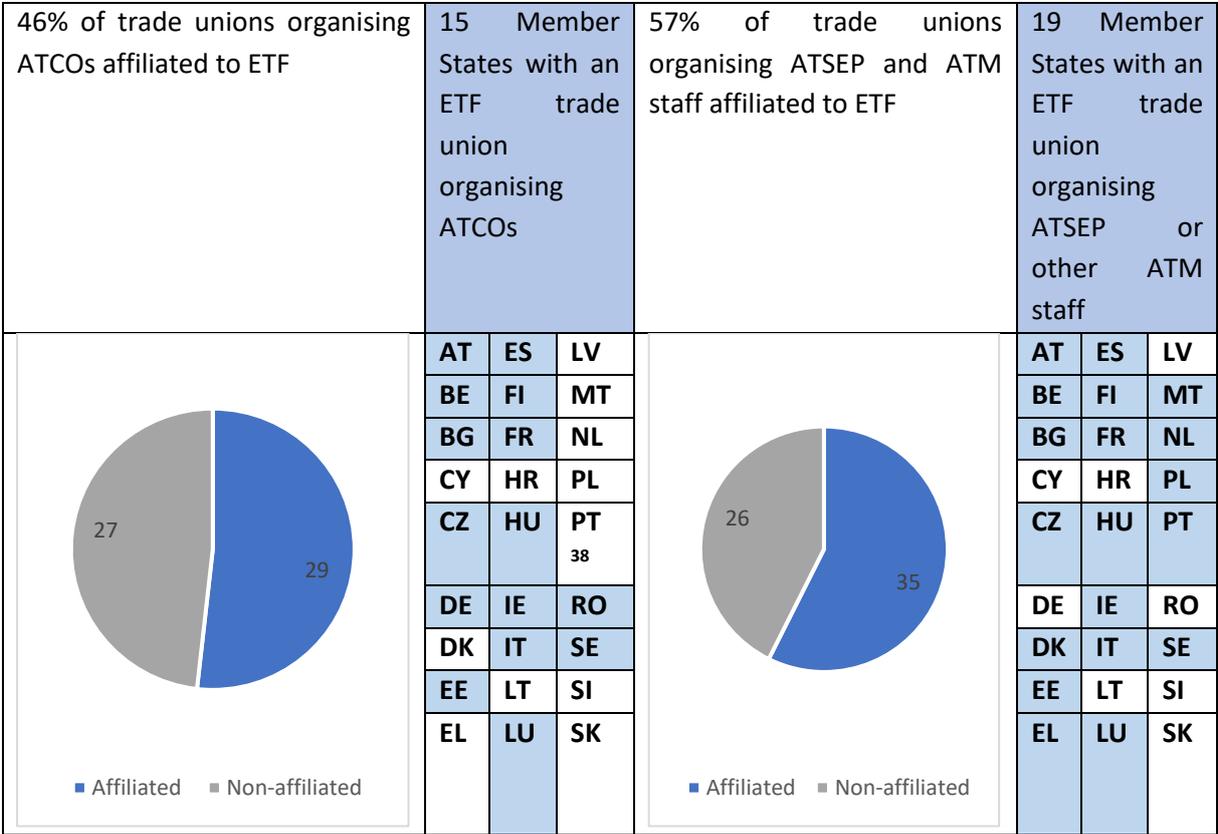
³⁵ The ETF reported that the Slovenian union SDPZ joined the ETF in 2020. It has a number of ground handling workers in Ljubljana and is only affiliated to ETF. This trade union was not included in the data collection and is not listed in Table 17 in Chapter 2.

these countries represent 70% of the EU sectoral workforce, and 70–90% of the sectoral workforce in their countries. Furthermore, in Croatia, Czechia, Ireland, Luxembourg, Malta,³⁶ the Netherlands, Poland³⁷ and Romania, ETF-affiliated trade unions organise one or two of the three largest airline companies. For Czechia (OSD) and Romania (SNTT), the trade unions did not confirm whether they organise pilots or cabin crew. At a rough estimate, airline companies organised by national aviation sector trade unions affiliated to ETF represent two-thirds of the workforce of all EU airline companies. Among the countries where ETF does not have an affiliated trade union organising aircrew, Greece and Portugal have the largest sectoral workforces.

6.1.2. ETF-affiliated trade unions organising air traffic management staff

ETF has 29 affiliated trade unions that organise ATCOs in 15 Member States, and 35 trade unions that organise ATSEP or other ATM employees in 19 Member States. All these trade unions are listed in Table 59 and visualised in Figure 19, on the left for the ATCOs and on the right for cabin crew.

Figure 19: ETF-affiliated trade unions organising ATCOs, ATSEP and other ATM staff, 2019–2020



Source: Table 59 and 129

³⁶ GWU in Malta organises aircrew in Air Malta and Ryanair.

³⁷ ZZPiL organises cabin crew in LOT, and Solidarność (TOZPLIN branch) organises cabin crew in Ryanair.

³⁸ ETF has a series of memorandums of understanding with Portuguese ATM Professional Staff Organisations (PSOs). They are not unions, so cannot affiliate directly, but do so through a memorandum of understanding.

Altogether, ETF has member unions organising ATCOs and/or ATSEP and other ATM staff in 21 Member States. In Croatia, Cyprus, Latvia, Lithuania, Slovakia and Slovenia, there is no trade union affiliated to ETF organising these employees.

Table 60: ETF affiliates present in the largest (only) ATM provider in the EU27

Member State	Largest/only ATM provider	ETF affiliates organising employees
AT	Austro Control	Vida
BE	Skeyes	ACV-CSC, ABVV-FGTB, ACLVB-CGSLB
BG	BULATSA	FTTUB, FTW-CL Podkrepa
CY	DCA (Ministry of Transport)	none
CZ	RLP	CZATCoA
DE	DFS	OSYPA (only ATM staff, no ATCOs)
DK	Naviair	HK Privat (only ATM staff, no ATCOs)
EE	Air Traffic Management	EstATCoA
EL	HCAA	OSYPA
ES	ENAIRE	CCOO, UGT
FI	ANS Finland	SLJY
FR	DGAC	UNSA, CGT, FO, CFDT
HR	Croatia Control	none
HU	HungaroControl	Control MLSZ (for ATCOs) and LESZ (for ATM staff)
IE	IAA	Forsa
IT	ENAV	FIT-CISL, FILT-CGIL, UIL Trasporti
LT	Oro Navigacija	none
LU	ANA	SAC OGBL, LCGB
LV	LGS	none
MT	MATS	GWU (only ATM staff, no ATCOs)
NL	LVNL	FNV Luchtvaart (only ATM staff, no ATCOs)
PL	PANSA	KSTLiOL
PT	NAV	SITAVA
RO	ROMATSA	SNTT (only ATCo)
SE	LFV	ST, Unionen
SI	Slovenia Control	none
SK	LPS	unknown

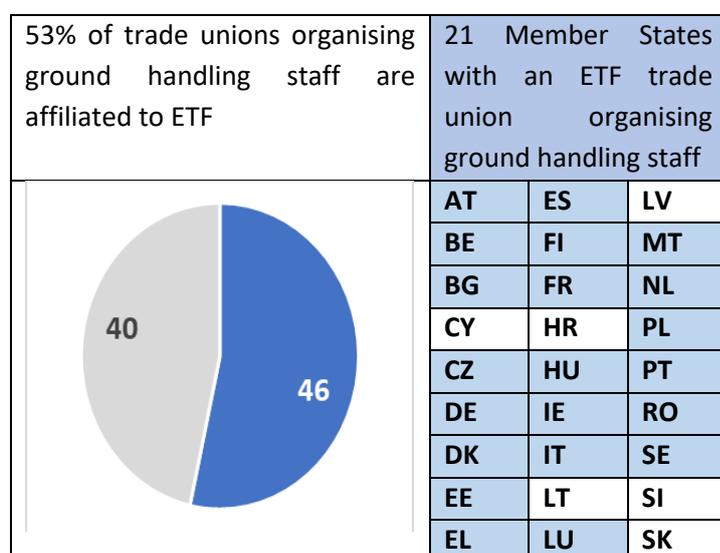
Notes: The green marked cells indicate the representativeness of the ETF through its affiliated trade unions.

Source: Network of Eurofound Correspondents, 2020 and ETF

6.1.3. ETF-affiliated trade unions organising ground service staff

There are 46 ETF-affiliated trade unions that organise ground handling staff in 21 Member States.

Figure 20: ETF representing trade unions organising ground handling staff, 2019–2020



Source: Table 59 and 130

Each Member State's largest three employers of ground handling staff are listed in Table 61 (in Slovenia there are only two large employers). Of the 80 employers, 44 are organised by trade unions affiliated to ETF. In 13 Member States, ETF-affiliated trade unions organise workers in all three of the largest employers of ground handling staff. This is the case in Austria, Belgium, Bulgaria, Germany, Denmark, Estonia, France, Ireland, Italy, the Netherlands, Portugal, Spain and Sweden. These countries represent more than 80% of the sectoral workforce. There are three companies in Czechia and Romania where ETF appears to have trade unions organising some employees in ground handling services, although not at any of the three largest employers.

The Solidarność trade union for ground staff (KSPTLiOL) is ETF affiliated and has a large membership in Welcome Airport Services. In Czechia, OSD, a member union of ETF, also represents ground handling employees, though it is not clear in which companies.

In Romania, the trade unions affiliated to ETF only represent some members in TAROM's maintenance and back-office services.

Table 61: ETF affiliates in the largest three employers of ground staff in the EU27

Member State	Largest three employers of ground staff	ETF affiliate(s) organising employees in the company
AT	Vienna International Airport	Vida
AT	Salzburg Airport	Vida
AT	Graz Airport	Vida
BE	SGS Belgium	ACV-CSC, ABVV-FGTB, ACLVB-CGSLB
BE	General Services Antwerp	ACV-CSC, ABVV-FGTB, ACLVB-CGSLB
BE	Lineas Group	ACV-CSC, ABVV-FGTB, ACLVB-CGSLB
BG	Sofia Airport	FTTUB, FTW-CL Podkrepa
BG	Burgas Airport	FTTUB, FTW-CL Podkrepa
BG	Varna Airport	FTTUB, FTW-CL Podkrepa
CY	Swissport Cyprus	
CY	LGS Handling	
CY	Hermes Airports	

Member State	Largest three employers of ground staff	ETF affiliate(s) organising employees in the company
CZ	Letiště Praha	
CZ	Czech Airlines Technics	
CZ	Menzies Aviation	
DE	Fraport	ver.di
DE	FraSec	ver.di
DE	AeroGround	ver.di
DK	SAS Ground Handling	HK Privat, 3F
DK	Aviator Services	HK Privat, 3F
DK	Skyways Technics	Dansk Metal
EE	Tallinn Airport	ETTA
EE	AS Tallinn Airport GH	ETTA
EE	Air Traffic Management	EstATCoA
EL	Goldair	
EL	Skyserv	
EL	Swissport	
ES	Iberia Airport Services	CCOO, UGT, USO
ES	Groundforce	CCOO, UGT
ES	Swissport	CCOO, UGT, USO
FI	Swissport Finland	IAU, JHL, Pro
FI	Finnair	n.a. ³⁹
FI	Airpro	IAU, JHL, Pro
FR	Groupe Air France	FO, CFDT, UNSA, CGT, CFTC
FR	Groupe ADP	CGT, UNSA, FO, CFDT
FR	Servair	FO, CFDT, CGT, UNSA
HR	Croatia Airlines	SKOZ
HR	Zagreb Airport	
HR	Split Airport	
HU	Budapest Airport	
HU	Celebi Ground Handling Hungary	RMFSZ
HU	Aeroplex	RMFSZ
IE	daa plc	SIPTU, Forsa
IE	Aer Lingus	Forsa, SIPTU
IE	Ryanair	Forsa
IT	Alitalia	FIT-CISL, FILT-CGIL, UIL Trasporti
IT	ENAV	FIT-CISL, FILT-CGIL, UIL Trasporti
IT	Aeroporti di Roma	FIT-CISL, FILT-CGIL, UIL Trasporti
LT	FL Technics	
LT	Lithuanian Airports	
LT	Litcargus	
LU	Luxair	OGBL
LU	Luxembourg Airport	OGBL, LCGB
LU	ANA	
LV	Riga International Airport	
LV	Haval Latvia SIA	
LV	ALS	
MT	Air Malta	GWU
MT	Malta International Airport	GWU
MT	Aviaserve	
NL	KLM	FNV, CNV
NL	Swissport	FNV

³⁹ ETF reported that Finnair outsources its ground handling services in Helsinki Airport. Probably this refers to the headquarters staff.

Member State	Largest three employers of ground staff	ETF affiliate(s) organising employees in the company
NL	DNATA BV	FNV
PL	LS Airport Services	
PL	Welcome Airport Services	KSPTLiOL
PL	PPL	
PT	TAP	SITAVA
PT	Groundforce	SITAVA
PT	Portway	SITAVA
RO	Bucharest Airport Otopeni	
RO	Globe Ground Romania	
RO	Cluj Airport	
SE	SAS	Unionen, ST
SE	Swedavia	Unionen, SEKO, STF
SE	Aviator Airport Service	STF, SEKO
SI	Fraport Slovenija	SDPZ
SI	Portorož Airport	
SI		
SK	BTS	
SK	LPS	
SK	TAT	

Note: *n.a.*, data not available. The green marked cells indicate the representativeness of the ETF through its affiliated trade unions.

Sources: *ETF and Network of Eurofound Correspondents, 2020*

ETF represents workers in all three types of ground handling service providers. It represents workers in specialised ground service providers in 10 Member States: Belgium, Germany, Denmark, Finland, Hungary, the Netherlands, Poland, Portugal, Spain and Sweden. Its affiliates represent workers in self-handling airlines, such as SAS (Denmark and Sweden), Croatian Airlines, Aer Lingus and Ryanair (Ireland), Air Malta, KLM (Netherlands) and TAP (Portugal). Finally, its affiliates represent airports or airport operators employing ground service employees in at least 11 Member States: Austria, Bulgaria, Estonia, France, Germany, Hungary, Ireland, Italy, Luxembourg, Malta and Slovenia.

6.1.4. ETF member unions' involvement in the national social partners' landscape

EFT-affiliated trade unions are involved in collective bargaining in the aviation sector in 22 of the 27 Member States (see Table 62). Only in Cyprus, Greece, Lithuania, Latvia and Slovakia are no ETF member unions involved in collective bargaining in the sector.

Table 62: Member States with an ETF affiliate involved in sector-related collective bargaining or social dialogue

Member State	Pilots (passenger)	Pilots (freight)	Cabin crew	ATC	Engineering staff (ATSEP)	Other ATM (admin)	Baggage-handling staff	Ticket desk, check-in and boarding, and administrative staff	Airport security staff	Aircraft maintenance and overhaul	Airport fire services	Services to aircraft such as fuel, catering, de-icing and pushbacks
AT												
BE												
BG			X									
CY												
CZ			X									
DE				X								
DK										X		
EE												
EL												
ES												
FI												
FR												
HR												
HU												
IE												
IT												
LT												
LU												
LV												
MT												
NL			X								X	
PL			X						X			X
PT									X			
RO												
SE												
SI							X	X				X
SK												
EU27	10 Member States	8 Member States	13 Member States	13 Member States	12 Member States	14 Member States	18 Member States	18 Member States	16 Member States	18 Member States	14 Member States	15 Member States

Note: The yellow cells were added by ETF in the feedback process. This information was not provided, or cross checked, by the Network of Eurofound Correspondents.

Source: Network of Eurofound Correspondents, 2020; ETF

There are also sector-related bipartite and tripartite social dialogue bodies in nine Member States in which ETF-affiliated trade unions are involved. In Belgium, Finland, Germany, Hungary and Spain, ETF-affiliated trade unions participate in bipartite aviation sector social dialogue. In France, they are involved in both bipartite and tripartite bodies. Tripartite social dialogue bodies exist in Austria, Denmark and Sweden. In Poland, sector unions affiliated to ETF are indirectly involved in a cross-sectoral social dialogue body, and in Romania there is a tripartite social dialogue body for all transport sectors together, although with no involvement of ETF-affiliated trade unions.

To illustrate these trade unions' capacity to autonomously implement agreements and joint positions, Table 62 indicates in which Member States ETF-affiliated trade unions are involved in collective bargaining with regard to specific areas and professional groups. ETF has an affiliate involved in collective bargaining on behalf of ground services employees in about two-thirds of the Member States. An affiliate is involved in collective bargaining on behalf of ATCOs, other ATM staff and cabin crew in about half of the Member States, while collective bargaining on behalf of pilots is limited to about one-third of the Member States.

6.1.5. ETF's capacity to negotiate on behalf of affiliated trade unions

ETF was established in 1999, participating in the aviation sector ESSDC from the beginning. It proved its capacity to negotiate as one of the European social partner organisations through its involvement in the 22 March 2000 European agreement on the organisation of working time of mobile staff in the aviation sector, which was implemented on 27 November 2000, through Council Directive 2000/79/EC.

ETF employs 25 people at its secretariat in Brussels. A total of 4.5 full-time equivalents (3 full-time and 3 part-time staff) work on aviation sector activities.⁴⁰ Some 60% of its activities are financed through membership fees, with the other 40% being on EU-funded projects. Staff working on aviation sector activities are fully financed by membership fees. ETF has a dedicated website for its aviation sector work, to share information on internal activities and policies.⁴¹

ETF's involvement in the aviation ESSDC is established in its constitution (2022), rule 1, paragraph 8:

Developing relations with European employers' organizations in order to establish sustainable social relations on the European level via social dialogue and negotiations, ensuring workers' representation in the relevant Sectoral Social Dialogue Committees and promoting the establishment and consolidation of European Works Councils in the sectors of its competence.

ETF has three governing bodies: a congress, an executive committee and a management committee. Bodies established for its various activities in multiple sectors are called 'sections', and ETF has a number of specific governing bodies for the aviation sector. There are the civil aviation section (CAS),

⁴⁰ ETF has 3 full-time and 3 part-time staff (a total of 4.5 full-time equivalents) because it also has a number of people whose work partly includes aviation, such as its organising work in central and eastern Europe, which is centrally controlled.

⁴¹ The ETF website is completely public; there is no members-only section. Information for members is distributed mainly through mailing lists and regular virtual and physical meetings.

which meets twice a year, a steering committee, three subsectoral committees and several ad hoc working groups, all dealing with matters related to the sector.

To obtain a mandate from its members for negotiating texts or agreements in the aviation sector, separate rules of procedure were adopted by the CAS on 15 June 2016, and ratified by the entire ETF executive committee on 30 September 2016.

These rules of procedures set out three decision-making mechanisms. Article 4.5 stipulates that:

general policy issues, conclusions and resolutions from CAS meetings, have to be reported to the ETF Executive Committee. While the aviation sector steering committee is mandated by the CAS to take decisions and promote the policies and positions of the section. For any call to action or decision resulting from social dialogue, the CAS must be consulted prior to any political initiatives that affect the section.

In negotiating texts, the steering committee and secretariat have the duty to explore solutions likely to result in a compromise. If a vote in the CAS is needed, this will be according to a simple majority, respecting the autonomy of affiliates to implement agreements reached. This autonomy does not imply that national strategies come into conflict with CAS strategies (Article 7.1). Article 7.2 indicates that, for decisions having significant financial implications for the ETF CAS budget, a majority of votes and the support of at least 50% of the total number of participating affiliates is needed. Finally, for any other question not covered by these rules of procedure, Article 8 provides guidelines and indicates that the CAS rules of procedures can only be amended by a two-thirds majority outcome in a ballot.

In addition to the ETF CAS, which meets twice a year, and the civil aviation steering committee, which meets four times a year, there are also three subsectoral committees: the ground staff committee, the joint aircrew committee and the ATM committee. Furthermore, ETF runs a number of working groups in the civil aviation sector that meet two or three times a year:

- EASA Steering Group
- ASPEReT (shared with CANSO and ATCEUC)
- TUI Transnational Airline Network
- Lufthansa Group Transnational Airline Network
- Ryanair Transnational Airline Network
- Wizz Air Transnational Airline Network
- Pilot Working Group
- Ground Staff Volunteers Group
- Women's Working Group (Informal)
- Med-Co Project Coordinating Committee (shared with the International Transport Workers' Federation (ITF) Arab World region)
- Social Dialogue Project Working Group (shared with other social partners)

Potential ESSCD joint opinions or texts are first discussed in the relevant subsectoral committee and in the steering committee. Affiliates are kept informed between meetings by email and in WhatsApp groups. A final decision is taken by the steering committee and signed off by the head of department if it is agreed to with employers, or by the ETF general secretary if it involves European institutions. A progress report is given to the CAS and the ETF executive committee on developments in the ESSDC. Further dissemination happens through the aviation section on the ETF website and by email.

In conclusion, the ETF CAS has well-equipped internal structures and precise decision-making mechanisms, with a strong capacity to negotiate rooted in the ETF constitution and the CAS rules of procedure.

ETF is also directly involved in providing expert assistance to European works councils representing network airline companies, including Air France–KLM, IAG and Lufthansa. ETF also participates in the works councils of TUI (German, not European), Swissport and Menzies.

ETF has been focusing on the overall improvement of working conditions in civil aviation against the backdrop of ongoing liberalisation of services, tougher competition and the implementation of various forms of atypical work, such as through agencies, zero-hours contracts and (bogus) self-employment. In particular, ETF has initiated numerous campaigns to combat social dumping, forum shopping practices and flags of convenience. With regard to the European sectoral social dialogue, ETF engages in various advisory bodies of EASA and participates in the formulation of the Commission’s Aviation Strategy for Europe as well as the implementation of the Single European Sky initiative.⁴² It also participates in the Commission’s Sub-Group on Social Matters Related to Aircrew, the Aviation Roundtable, the Expert Group on the Human Dimension of the Single European Sky and Single European Sky ATM Research (SESAR).⁴³

6.2. European Cockpit Association

ECA represents the aircrew subsector only, with a strong focus on pilots.

6.2.1. Membership domain and membership composition of ECA

ECA is an interest organisation that represents European pilots. Its membership domain is sectional, as it covers only one specific professional group in the sector. ECA organises 16 trade unions (involved in collective bargaining) and 4 professional associations (not involved in collective bargaining) in 18 Member States. In Denmark and Finland it has two member organisations, while in each of the other Member States there is one affiliated organisation. In four other Member States trade unions not affiliated to ECA organise pilots; this is the case in Estonia, Lithuania, Poland and Romania.

Table 63: Membership domain and membership composition of ECA

Member State	Trade union	Occupations covered (NACE codes)					EU-level affiliation				Collective bargaining involvement
		Pilots (51.10 + 51.21)	Cabin crew (51.10)	ATCOs (52.23)	ATSEP and other ATM (52.23)	Ground handling (52.23)	ETF	ECA	EurECCA	ATCEUC	
Total of 20 ECA members in 18 MSs		20 in 18 MSs	3 in 3 MSs	1 in 1 MS	0	1 in 1 MS	Most of the ECA member organisations are only affiliated to ECA. Exceptions are 1 trade union in Luxembourg and 1 in Denmark that are also affiliated to ETF and 1 trade union in Italy that is also affiliated to EurECCA				16 in 14 MSs
All TUs	164 in 27 MS	46 in 20 MSs	45 in 21 MSs	56 in 26 MSs	61 in 25 MSs	86 in 27 MSs					148 in 27 MSs
% of TUs	12	41	7	2	0	1					11
% of MSs	67	90	14	4	0	4					52

⁴² See https://www.etf-europe.org/our_work/civil-aviation/

⁴³ SESAR is an institutionalised European partnership between private and public sector partners set up to accelerate through research and innovation the delivery of the Digital European Sky.

Member State	Trade union	Occupations covered (NACE codes)					EU-level affiliation				Collective bargaining involvement
		Pilots (51.10 + 51.21)	Cabin crew (51.10)	ATCOs (52.23)	ATSEP and other ATM (52.23)	Ground handling (52.23)	ETF	ECA	EurECCA	ATCEUC	
AT	ACA	yes						yes			
BE	BeCA	yes						yes			
CZ	CZALPA	yes						yes			SEB
DE	VC	yes						yes			SEB
DK	DALPA	yes						yes			SEB
DK	FPU	yes					yes	yes			SEB
ES	SEPLA	yes						yes			MEB + SEB
FI	YTY	yes		yes				yes			SEB
FI	FPA	yes						yes			(SEB)
FR	SNPL	yes						yes			SEB
HR	HSPP	yes						(yes)			SEB
HU	HUNALPA	yes						yes			
IE	IALPA	yes						yes			SEB
IT	ANPAC	yes	yes					yes	yes		SEB
LU	ALPL-LCGB	yes	yes				yes	yes			SEB
LV	LAA	yes	yes			yes		yes			SEB
MT	ALPA	yes						yes			SEB
NL	VNV	yes						yes			SEB
PT	APPLA	yes						yes			
SE	SPF	yes						yes			MEB + SEB

Notes: MEB, multi-employer bargaining; MS, Member State; SEB, single-employer bargaining. Affiliations in parentheses mean indirect membership via higher- or lower-order units. Collective bargaining involvement in parentheses means effective involvement in negotiations, while a higher-order unit is the signatory.

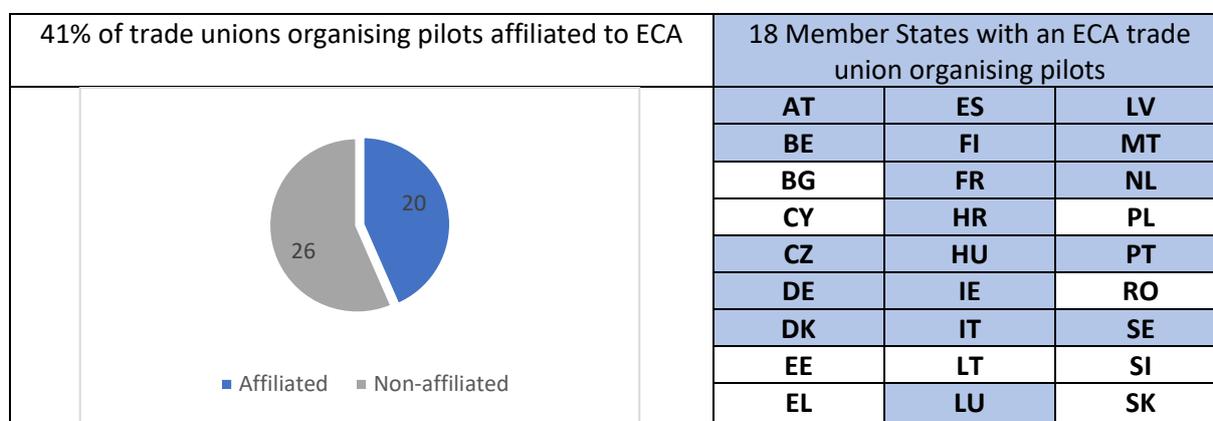
The dark green cells indicate the countries where ECA has an affiliated organisation representing pilots. The light green cells indicate that some trade unions affiliated to ECA also have members in other professional groups, though they are only for the pilots represented by ECA. The yellow cells indicate the affiliation to European trade union organisations and the blue cells the involvement in sectoral collective bargaining. Light orange indicates organisations identified as professional associations or guilds rather than trade unions. Dark blue indicates involvement in sector-related multi-employer bargaining in combination with single-employer bargaining), whereas light blue indicates involvement in only single-employer bargaining related to the sector.

Source: Network of Eurofound Correspondents, 2020

6.2.2. ECA represents mainly trade unions organising pilots

ECA has 19 affiliated trade unions, which corresponds to 41% of all 46 trade unions that organise pilots.

Figure 21: ECA trade unions organising pilots, 2019–2020



Source: Table 63 and 128

Table 63 lists 20 ECA members in 18 Member States. No members can be found in Bulgaria, Cyprus, Estonia, Greece, Lithuania, Poland, Romania, Slovakia or Slovenia.⁴⁴ Most of the ECA affiliates are involved in sector-related collective bargaining at company level only. This is because the signatory party vis-à-vis the trade union is usually the individual air carrier rather than an employer organisation. In four countries (Austria, Belgium, Hungary and Portugal), the ECA affiliate is a professional organisation rather than a trade union, such that collective bargaining on behalf of its members is carried out by another workers' organisation (a trade union with the right to enter into bargaining) in these countries.

Table 63 also illustrates a consistently narrow membership domain of the ECA members. With the exceptions of Finland's YTY, which also organises ATC workers, and Italy's ANPAC, Luxembourg's ALPL-LCGB and Latvia's LAA, which all also organise cabin crew (and in the case of LAA also ground handling staff), all other ECA affiliates (from 15 Member States) exclusively represent pilots. ECA's membership is confined to the occupational group of pilots (and thus very specifically tailored to this very powerful profession), and it represents about 41% of all trade unions in the EU27 that organise pilots. Through affiliations, it is present in 18 of the 21 countries with trade unions organising pilots. ECA claims to represent more than half of all unionised pilots. Based on ECA calculations that could not be confirmed in the scope of this study, the ECA-affiliated trade unions and professional associations would represent about 39,000 active pilots of the 66,000 pilots (59%) with licences in the EU. Not all of the licensed pilots in the EU are active; some are students, unemployed or retired. The proportion of active pilots organised by trade unions affiliated to ECA must thus be very high, probably around 70–80% or even higher.

Of the 20 ECA member organisations, 3 are also members of other European-level associations (ANPAC of Italy being affiliated to EurECCA and FPU of Denmark and ALPL-LCGB of Luxembourg being

⁴⁴ Regarding the membership strength of some of its affiliates, ECA indicates that some associations in eastern Europe do not disclose the numbers of their members. Table 15 includes information on membership strength for air transportation (aircrew) all together, but not for the numbers of organised pilots separately.

affiliated to ETF); all other sector-related ECA affiliates are exclusively represented by this organisation at European level.

Article 10 of the ECA statutes makes a distinction between full members (European region) and associate members (non-European). All the member organisations in Table 63 are confirmed to be full members of ECA.

Through its national affiliates, ECA is present in at least one of the largest employers of pilots and aircrew in each of 14 Member States, among which are the largest Member States (see Table 64). In Austria, Belgium, Finland, France, Germany, Spain and Sweden, an ECA affiliate represents workers in each of the three largest airline employers.

Table 64: ECA affiliates active in the largest airline employers per country in the EU27

Member State	Name of largest airline employers in the sector	Name of ECA affiliated trade union(s) organising the employees in the company
AT	Austrian Airlines	ACA
AT	Laudamotion	ACA
AT	Eurowings Europe	ACA
BE	Brussels Airlines	BeCA
BE	TUI Airlines Belgium	BeCA
BE	TNT Express Worldwide	BeCA
BG	Bulgarian Air Charter	none
BG	Bulgaria Air	none
BG	Cargo Air	none
CY	Cyprus Airways	none
CY	TUS Airways	none
CZ	Smartwings	CZALPA
CZ	Czech Airlines	CZALPA
CZ	ABS Jets	none
DE	Lufthansa	VC
DE	Eurowings	VC
DE	TUI fly	VC
DK	SAS Denmark	DALPA
DK	Sunclass Airlines	DALPA
DK	DAT A/S	none
EE	Regional Jet OÜ	none
EE	AS Fort Aero	none
EE	Airest AS	none
EL	Aegean Airlines	none
EL	Olympic Air	none
EL	Ellinair	none
ES	Iberia	SEPLA
ES	Air Europa	SEPLA
ES	Vueling	SEPLA
FI	Finnair	FPA/YTY
FI	Nordic Regional Airlines	FPA/YTY
FI	Norwegian OSM Fi Oy	FPA/YTY
FR	Air France	SNPL
FR	HOP !	SNPL
FR	EasyJet	SNPL

Member State	Name of largest airline employers in the sector	Name of ECA affiliated trade union(s) organising the employees in the company
HR	Croatia Airlines	HSPP
HR	Trade Air	none
HU	Wizz Air Hungary	none
HU	ASL Airlines	none
HU	Smartwings Hungary	none
IE	Ryanair	IALPA
IE	Aer Lingus	IALPA
IE	City Jet	unknown
IT	Alitalia	ANPAC
IT	EasyJet	none
IT	Ryanair	ANPAC
LT	GetJet Airlines	none
LT	DAT LT	none
LT	Avion Express	none
LU	Luxair	LCGB/ALPL
LU	Cargolux	LCGB/ALPL
LU	Luxaviation	none
LV	Air Baltic corporation ⁴⁵	LAU
LV	SmartLynx Airlines	none
LV	RAF-AVIA AS	none
MT	Air Malta	ALPA
MT	Malta Air	none
MT	Mediavia	none
NL	KLM	VNV
NL	Transavia (daughter company of KLM)	VNV
NL	TUI Group	VNV
PL	LOT Polish Airlines	none
PL	Enter Air	none
PL	Sprint Air	none
PT	TAP	SPAC ⁴⁶ (indirectly represented in ECA through APPLA)
PT	SATA	SPAC (indirectly represented in ECA through APPLA)
PT	PGA	SPAC (indirectly represented in ECA through APPLA)
RO	TAROM	none
RO	Blue Air	none
SE	SAS	SPF
SE	TUI fly Nordic	SPF
SE	Braathens Regional Airlines	SPF

⁴⁵ Air Baltic Corporation transferred the crew members' contracts to an in-house staffing subsidiary called Aviation Crew Resources. The pilots who fly these aircraft are organised by LAU, which is a trade union that is affiliated to ECA.

⁴⁶ The three airlines in Portugal (TAPA, SATA and PGA) are represented by SPAC. SPAC is the Portuguese founding member of ECA. The international representation is delegated to APPLA, an association without bargaining power, which is independent from SPAC but functionally linked to the union, which is its main source of revenue. Whenever ECA deals with industrial issues, following the arrangements between the union and the association, SPAC members attend the ECA meetings on behalf of APPLA.

Member State	Name of largest airline employers in the sector	Name of ECA affiliated trade union(s) organising the employees in the company
SI		
SK	AirExplore	none
SK	Go2Sky	none
SK	Travel Service Slovensko	none

Sources: ECA and Network of Eurofound Correspondents, 2020

6.2.3. Involvement of ECA member unions in social dialogue or collective bargaining

ECA has 16 trade unions involved in collective bargaining in 14 Member States. All of them represent passenger air pilots in collective bargaining, while nine of them also represent freight air transport pilots. Five ECA-affiliated trade unions in five Member States take part in collective bargaining on behalf of cabin crew.

Twelve ECA member unions are consulted by governments on sector-related topics. Mutual recognition through involvement in social dialogue structures is found in Austria, Denmark, France, the Netherlands and Sweden. Seven of the ECA member unions are part of cross-industry trade union confederations.

All details of the involvement of ECA member unions in industrial relations can be found in Table 65.

Table 65: Involvement of ECA member unions in collective bargaining, consultation procedures and social dialogue, 2020

Member State	Trade union	Collective bargaining involvement													Consultation	Social dialogue		Type of organisation	Representativeness of organisation	National affiliation
		Pilots NACE 51.10	Pilots NACE 51.21	Cabin crew	ATC	ATSEP	Other ATM	Baggage handling	Ticket desk/check-in	Airport security	Aircraft maintenance/overhaul	Airport fire services	Services such as fuel, catering, de-icing	Air transport activities (NACE 51.10 + 51.21)		Bipartite	Tripartite			
AT	ACA	no	no	no	no	no	no	no	no	no	no	no	no	no	yes	no	yes	PA	no	no
BE	BeCA	no	no	no	no	no	no	no	no	no	no	no	no	no	no	no	no	PA	no	no
CZ	CZALPA	yes	no	no	no	no	no	no	no	no	no	no	no	yes	no	no	no	TU	MR + LC	no
DE	VC	yes	yes	no	no	no	no	no	no	no	no	no	no	yes	yes	no	no	TU	MR	no
DK	FPU	yes	yes	yes	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	yes	no	yes	TU	MR	FH
DK	DALPA	yes	no	no	no	no	no	no	no	no	no	no	no	yes	yes	no	yes	TU	MR	no
ES	SEPLA	yes	yes	no	no	no	no	no	no	no	no	no	no	yes	no	no	no	TU	LC	no
FI	FPA	(yes)	no	no	no	no	no	no	no	no	no	no	no	yes	yes	no	no	TU	MR	Akava
FI	YTY	yes	no	no	no	no	no	no	no	no	no	no	no	yes	yes	no	no	TU	MR	Akava
FR	SNPL	yes	yes	yes	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	yes	yes	yes	TU	LC	no
HR	HSPP	yes	no	yes	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	no	no	no	TU	LC	ITUC
HU	HUNALPA	no	no	no	no	no	no	no	no	no	no	no	no	no	no	no	no	PA	no	MAPLESZ
IE	IALPA	yes	yes	no	no	no	no	no	no	no	no	no	no	yes	no	no	no	TU	MR	ICTU
IT	ANPAC	yes	yes	yes	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	yes	no	no	PA	MR	no
LU	LCGB (ALPL)	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	no	no	TU	LC	LCGB
MT	ALPA	yes	no	no	no	no	no	no	no	no	no	no	no	yes	yes	no	no	TU	MR	no
NL	VNV	yes	yes	no	no	no	no	no	no	no	no	no	no	yes	yes	yes	no	TU	MR	no
PT	APPLA	no	no	no	no	no	no	no	no	no	no	no	no	no	n.a.	n.a.	n.a.	PA	no	no
SE	SPF	yes	yes	no	no	no	no	no	no	no	no	no	no	yes	yes	yes	no	TU	MR	no

Notes: GUI, guild; LC, legal criteria; MR, mutual recognition of social partners; n.a., not available; PA, professional association; TU, trade union. Affiliations in parentheses indicate indirect membership through higher- or lower-order units. Collective bargaining involvement in parentheses indicates effective involvement in negotiations, while a higher-order unit is the signatory. Pink cells indicate collective bargaining involvement. Medium green indicates involvement in consultation procedures; light green indicates participation in bipartite/tripartite social dialogue bodies. Yellow indicates organisations identified as trade unions rather than professional associations or guilds. Blue indicates representative organisations according to national law. Names of organisations in bold are affiliated to at least one of the European organisations: ETF, ECA, EurECCA and ATCEUC.

Source: Network of Eurofound correspondents, 2020

6.2.4. ECA's autonomy and capacity to negotiate

ECA was established in 1991 and has participated in the ESSDC since 2000. It has a proven capacity to negotiate, as it was one of the European social partner organisations that reached the 22 March 2000 European agreement on the organisation of working time of mobile staff in the aviation sector, which was implemented on 27 November 2000, through Council Directive 2000/79/EC.

ECA has a staff of 10 working at its secretariat in Brussels, of whom 4 are regularly involved in social dialogue or industrial relations. ECA is entirely financed by membership fees. Its website includes a members-only aviation section to share information on internal activities and policies, (draft) documents for its statutory bodies, minutes and position papers. Article 8 of the ECA by-laws indicates that ECA has a formalised relationship with the International Federation of Airline Pilots Associations, while maintaining its operational, financial and political independence. Article 7 emphasises that ECA is an independent association.

ECA's involvement in the ESSDC is rooted in its objectives listed in Article 4 (a) and (b) of its statutes of 22 November 2018. Article 4 (a) states that its first objective is to represent its members at European level (before European institutions) and in the ESSDC. Article 4 (b) refers to ECA's EU social partner status.

ECA has the following statutory bodies:

- the ECA Conference, assembling all member associations, with the task of approving financial affairs (Articles 20–30)
- the ECA executive board (Articles 31–49)
- working groups— currently there are 10 working groups advising the executive board on matters such as security, training and licensing, ATM and airports, and flight time limitations (Articles 50–51)
- the ECA Office, led by the secretary-general, which handles the operation of day-to-day business and carries out tasks assigned by the executive board; it also represents the association in external meetings and working groups (Article 2.2)

The ECA industrial working group discusses matter associated with the ESSDC. Other working groups can be consulted if a topic is relevant to them. The executive board nominates representatives to attend ESSDC meetings and monitors its activities. ECA's transnational airlines pilot groups defend the interests of pilots in a group of airlines or in a single airline with operational bases in multiple Member States.

Article 50 of the ECA by-laws states that the executive board can establish a procedures manual to provide guidelines on decision-making processes and the composition of working groups and committees, including their mandate and duration. Under Article 51, the members of ECA working committees have no decision-making powers. Only the executive committee can delegate powers, in accordance with Article 33. No such procedures manual has been published.

ECA's capacity to negotiate is confirmed in Articles 5 and 7 of its statutes. Under Article 5, any act, transaction or initiative can be taken to fulfil its objectives, including engaging with national and international bodies. Article 9 adds that ECA may conclude arrangements with other organisations in the field of civil aviation and industrial relations.

Internal discussions on ESSDC initiatives take place in the ECA industrial working group, which considers whether it is in line with ECA positions. Draft joint opinions are distributed to and approved by the ECA executive board (composed of seven pilots elected at the ECA Conference), and subsequently signed off by the ECA president and secretary-general. Depending on the sensitivity of a draft joint opinion, the presidents of the member organisations could also be consulted.

ECA has emerged as an important stakeholder and signatory of several ESSDC joint texts regarding issues related to atypical employment, EU-based flags of convenience in aviation, social security, occupational

health and security, a healthy and fair work culture, and working hours. The ECA Conference is kept informed on social dialogue initiatives. The conference offers orientations depending on the political dimension of potential actions. In cases of agreements of a binding nature, the conference will be informed and may ask for formal approval by vote.

To illustrate the capacity to implement agreements and joint opinions autonomously, Table 65 indicates (pink shaded cells to the left) the member organisations involved in collective bargaining.⁴⁷ There are 15 ECA-affiliated trade unions in 13 Member States that are involved in single-employer collective bargaining. For 13 of them, their involvement is limited to single-employer bargaining. The two exceptions are SEPLA in Spain and SPF in Sweden, which are also involved in multi-employer collective bargaining.

6.3. Air Traffic Controllers European Union Coordination (ATCEUC)

The Air Traffic Controllers European Union Coordination (ATCEUC) represents trade unions that organise employees of ANSP, with a special focus on the professional group of ATCOs. ATCEUC is part of the European Confederation of Independent Trade Unions (CESI).

6.3.1. Membership domain and membership composition of ATCEUC

ATCEUC represents 23 trade unions in 20 Member States. ATCEUC only represents its affiliated trade unions for ATM activities, not aircrew or any other ground service employees. Within ATM activities, the focus lies on ATCOs, for whom ATCEUC has 22 affiliated trade unions. Its affiliate TUACV Transcom in Belgium only organises blue-collar ATSEP. CYATCU in Cyprus occasionally represents ATM employees who were formerly ATCOs but have been promoted into management functions. With these two trade unions included, ATCEUC has eight affiliated trade unions organising ATSEP in eight Member States and eight affiliated trade unions organising other ATM employees in eight Member States. Their main membership domain is thus focussed on ATCOs, whom they organise with 22 trade unions in 20 Member States.

Table 66: Membership domain of ATCEUC in the aviation sector, 2019–2020

Member State	Trade unions affiliated to ATCEUC	ATC	ATSEP	Other ATM	ETF	ATCEUC
Number of ATCEUC TUs	23 TUs in 20 MSs	22 TUs in 20 MSs	8 TUs in 8 MSs	8 TUs in 8 MSs	Most of the ATCEUC-affiliated trade unions are only members of ATCEUC	
All ATM TUs	82 trade unions in ATC or ATM	58	43	46		
% of TUs	27	36	16	15		
% of MSs	74	74	26	26		
BE	ACV-CSC Transcom		blue collar only		yes	yes
BE	BGATCo	yes				yes
BG	BATCU	yes				yes
CY	CYATCU	yes		former ATCOs ⁴⁸		yes
DE	GdF	yes				yes

⁴⁷ The Portuguese association affiliated to ECA has a particular status. The ECA founding member is SPAC (Sindicato dos Pilotos da Aviação Civil). SPAC has delegated representation on ECA to APPLA, the association of pilots that deals with technical and social issues. SPAC transfers funds to APPLA so it can pay ECA membership fees. The Portuguese members of the ECA industrial working group are designated by SPAC, the body where social dialogue matters are discussed. Where agreements need the signature of a union, SPAC signs. SPAC designates the Portuguese delegation to meetings regarding transnational airlines pilot groups, such as the Ryanair Pilot Group, which aims to negotiate collective agreements at transnational level. APPLA (SPAC) can therefore be considered to have the authority to engage in collective bargaining in Portugal.

⁴⁸ Former ATCOs now in managerial positions in the Department of Civil Aviation and NSA.

Member State	Trade unions affiliated to ATCEUC	ATC	ATSEP	Other ATM	ETF	ATCEUC
DK	DATCA	yes				yes
EL	EEEKE	yes				yes
EL	HACU	yes				yes
ES	USCA	yes				yes
FI	SLJY (FATCA)	yes			yes	yes
FR	SNCTA	yes				yes
HR	CATCU (HSSKL)	yes				yes
IE	Forsa	yes			yes	yes
IT	Unica	yes				yes
LT	LATCA	yes				yes
LU	LGATC	yes				yes
MT	MATCA	yes				yes
NL	VNLG	yes				yes
NL, DE and BE (EU) ⁴⁹	TUEM (Eurocontrol)	yes				
PL	ZKRL	yes				yes
PT	SINCTA	yes				yes
RO	ATSR	yes				yes
SI	SSKL	yes				yes

Notes: MS, Member State; TU, trade union. The cells marked in green indicate the representativeness of the ATCEUC through its affiliated trade unions. The cells marked in yellow indicate the affiliation at European level.

Source: Network of Eurofound correspondents, 2020

Most of the ATCEUC member unions are affiliated only to ATCEUC for their membership in ATM activities. There are three exceptions, affiliated to both ATCEUC and ETF: ACV Transcom in Belgium, SLJY in Finland and Forsa in Ireland.

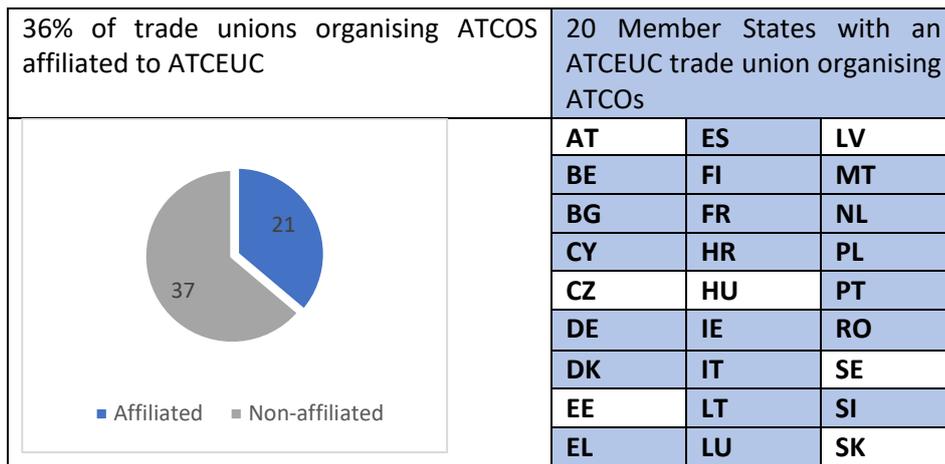
6.3.2. ATCEUC representing air traffic controllers

Of the 59 trade unions organising ATCOs in the EU27, there are 22, or 37%, affiliated to ATCEUC in 20 Member States. There is no ATCEUC-affiliated trade union in seven Member States. There is an ETF-affiliated trade union organising ATCOs in six of the Member States where there is no ATCEUC-affiliated trade union. Only in Latvia is there no affiliated trade union representing ATC workers.

A comparison of the membership strength for ATCOs (Figure 22) and for ATSEP and other ATM staff (Figure 23) shows the overwhelming presence of ATCEUC among ATCOs. For ATSEP and other ATM employees, there are only 16 affiliated trade unions, or 15%, in seven Member States.

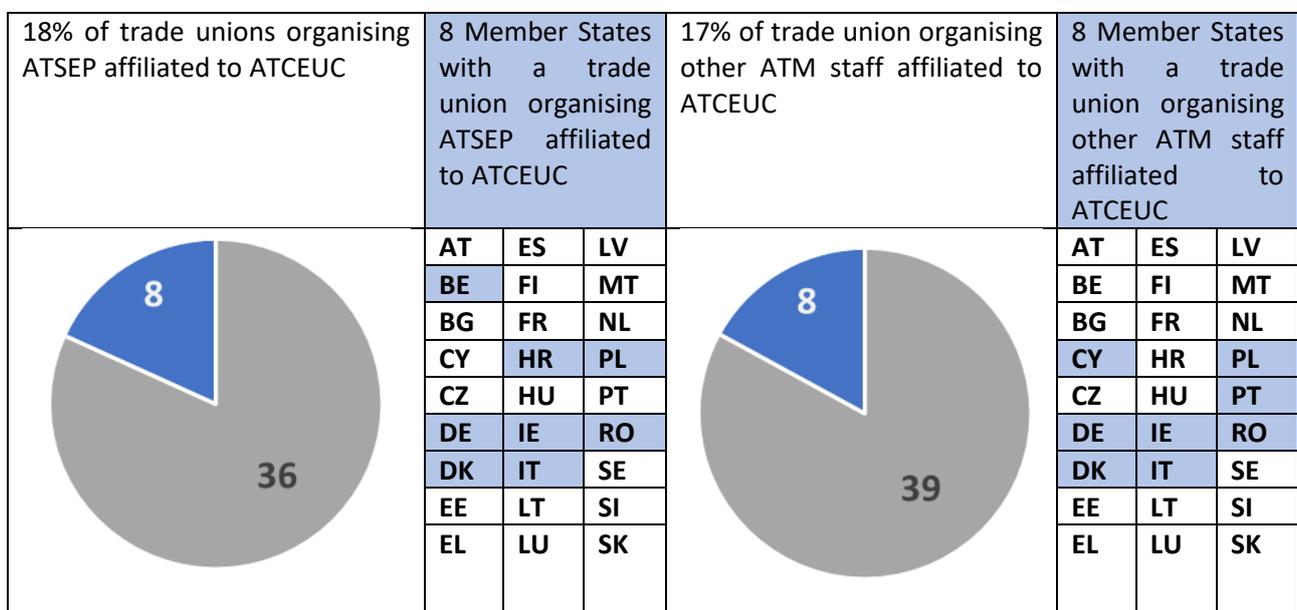
⁴⁹ TUEM is employing ATCO's in the Netherlands, Germany, Belgium and they cover ATM activities for the EU.

Figure 22: ATCEUC-affiliated trade unions organising air traffic controllers, 2019–2020



Source: Network of Eurofound Correspondents, 2020

Figure 23: ATCEUC-affiliated trade unions organising ATSEP or other ATM staff, 2019–2020



Source: Network of Eurofound Correspondents, 2020

Table 67 lists all ATCEUC-affiliated trade unions representing ATCOs, ATSEP or ATM employees of the ANSPs in the largest (or only) ATM service providers in the 27 Member States. For Spain, information is included on all three employers of ATCOs.

Table 67: ATCEUC affiliates present in the largest (or only) ATM provider, EU27

Member State	Largest/only ATM provider	Total number of ATCOs	ATCEUC affiliates organising employees	Proportion of ATCOs represented by ATCEUC (%)	Trade union organising ATM employees not affiliated to ATCEUC
EU (BE, DE, NL)	Eurocontrol (300	TUEM	100	n.a
AT	Austro Control	n.a	none	n.a	VIDA, GPF
BE	Skeyes	300	ACV-CSC	n.a	ABVV-FGTB, ACLVB-CGSLB
BG	BULATSA	311	BATCU	~ 90	FTTUB, FTW-CL Podkrepa

CY	DCA (Ministry of Transport)	n.a	CYATCU	90	PASYDY
CZ	RLP	n.a	none	n.a	CZATCA, CZATSEA, RLP company trade union
DE	DFS	1,800	GdF	95	n.a
DK	Naviair	275	DATCA	100	n.a
EE	Air Traffic Management	n.a	none	n.a	EstATCa
EL	HCAA	n.a	HACU	n.a	OSYPA
ES	ENAIRES (state owned, approach and 30 towers)	2,000	USCA	84	CC.OO, UGT Spica (75), OCCA (35), SNCA (20)
	Saerco (private, 9 towers)	175		53	CCOO (70), USOC
	FerroatNATS (private, 4 towers)	175		53	CCOO (70), USOC
FI	ANS Finland	240	SLJY	75	n.a
FR	DGAC	3,069	SNCTA	56	UNSA, CGT, FO, CFdT
HR	Croatia Control	n.a	CATCU	n.a	SDHKZP
HU	HungaroControl	n.a	none	n.a	Control, IDFSZ, LIGOSZ
IE	IAA	n.a	Forsa	95	AHCPS
IT	ENAV	n.a	UNICA	n.a	FIT-CISL, FILT-CGIL, UIL Transporti, UGL Transporto Aereo, USB
LT	Oro Navigacija	n.a	LATCA	n.a	Union of Oro Navigacija, Union of Kaunas Traffic Controllers
LU	ANA	n.a	LGATC	n.a	LACA
LV	LGS	n.a	none	n.a	LADA, LAAF
MT	MATS	52	MATCA	92	GWU
NL	LVNL	n.a	VNLG	n.a	n.a
PL	PANSA	600	ZZKRL	60	OZZSRL (35%), ZZKLW (5%) NSZZ Solidarność
PT	NAV	300	SINCTA	98	SITECSA, SITAVA
RO	ROMATSA	n.a	ATSR	98	
SE	LFV	n.a	none	n.a	ST, Unionen
SI	Slovenia Control	n.a	SSKL	n.a	SAITS, SATS
SK	LPS	n.a	none	n.a	n.a

Note: n.a., data not available.

Source: ATCEUC and Network of Eurofound Correspondents, 2020

Twelve of the ATCEUC-affiliated unions (in 10 Member States), according to the information provided, organise most or almost all of the ATCOs in those countries. Based on the information from those countries, it can be concluded that ATCEUC is, for the professional group of ATCOs, the most representative European association. It is followed by ETF, which also has a significant membership among ATM employees and ATSEP, although for the professional group of ATCOs ETF's membership base appears smaller than that of ATCEUC.

Of the 22 ATCEUC members, 19 organise only ATCOs and/or ATSEP, while two (ACV-CSC Transcom of Belgium and GdF of Germany) also organise some ground handling staff, and one (Forsa of Ireland) also represents ground handling staff and cabin crew. Accordingly, representation is tailored to ATM workers, in particular

ATCOs and ATSEP, and thus quite narrow in focus. With the exception of Belgium’s ACV-CSC Transcom, all ATCEUC affiliates represent ATCOs. In Belgium, the other ATCEUC affiliate (BGATCo) represents ATCOs. No information has been provided by MATCA in Malta. By contrast, only about half of the ATCEUC members represent ATSEP, which indicates that ATCEUC member unions’ primary constituency is ATCOs rather than ATSEP.

Of the 22 ATCEUC member organisations, 3 are also members of ETF (co-affiliations to ECA and EurECCA do not exist), while all other sector-related ATCEUC member unions are exclusively represented by ATCEUC at European level.

Also adding to the representativeness of ATCEUC are the ATCOs who are part of Trade Union Eurocontrol Maastricht (TUEM) and the ATCOs working for the Maastricht Upper Area Control Centre. These are 87 ATCOs in the Brussels sector group (Belgium), 85 in the Deco sector group (Netherlands), 91 in the Hannover sector group (Germany) and 24 in the German military.

6.3.3. ATCEUC member unions in the national social partner setting

ATCEUC has 17 affiliated trade unions that are involved in collective bargaining for ATCOs in 16 Member States. There is an affiliated trade union involved in collective bargaining for ATSEP in 9 Member States and for other ATM staff in 10 Member States. This includes, however, 3 Member States where the ATCEUC does not have members among the ATSEP or other ATM staff; its involvement in collective bargaining is due to its representativeness for the ATCOs, and because the collective bargaining is for ATCOs, ATSEP and ATM all together. These cases are shaded purple in Table 68. Limiting the context to the trade unions involved in collective bargaining for ATSEP where the ATCEUC-affiliated trade union has also members results in six trade unions in six Member States. ATCEUC has seven affiliated trade unions involved in collective bargaining that also have members among the other ATM staff in seven Member States.

Table 68: ATCEUC affiliated trade unions involved in collective bargaining

Member State	Trade union affiliated to ATCEUC	Collective bargaining for ATCOs	Collective bargaining for ATSEP	Collective bargaining for other ATM staff	Consulted	Bipartite social dialogue	Tripartite social dialogue	Type of collective bargaining involvement
Total		17 trade unions in 16 Member States	6 trade unions (9) in 6 Member States (9)	7 trade unions (10) in 7 Member States (10)	13 trade unions in 12 Member States	7 trade unions in 6 Member States	1 trade union in 1 Member State	
BE	ACV-CSC Transcom							MEB + SEB
BE	BGATCo	none ⁵⁰						
BG	BATCU							SEB
CY	CYATCU							SEB
DE	GdF							SEB
DK	DATCA							MEB + SEB
EL	EEEKE							

⁵⁰ BGATCo does not do collective bargaining but has, through its capacity to mobilise, an important role in the industrial relations setting. ATCOs are a remarkable group within Belgian social dialogue. Comparable to train drivers within the railway sector, they have significant power over all airport activities. If they choose to strike, the entire airport ceases to function. They are a relatively small but strongly organised group through their own guild (BGATCo), which regularly functions as the voice of the controllers, alongside the traditional trade unions. As is the case with all business associations in Belgium, BGATCo has no formal negotiation or signing rights within the joint committee.

Member State	Trade union affiliated to ATCEUC	Collective bargaining for ATCOs	Collective bargaining for ATSEP	Collective bargaining for other ATM staff	Consulted	Bipartite social dialogue	Tripartite social dialogue	Type of collective bargaining involvement
EL	HACU							
ES	USCA							SEB
FI	SLJY							SEB
FR	SNCTA						(x) ⁵¹	SEB
HR	CATCU (HSSKL)							SEB
IE	Forsa							SEB
IT	Unica							MEB + SEB
LT	LATCA							SEB
LU	LGATC							
MT	MATCA							SEB
EU	TUEM (NL, DE, BE)							
NL	VNLG							SEB
PL	ZZKRL							SEB
PT	SINCTA							SEB
RO	ATSR							SEB
SI	SSKL							MEB + SEB

Note: MEB, multi-employer bargaining; MS, Member State; SEB, single-employer bargaining. Colour code: the cells marked in purple indicate the professional groups covered by collective bargaining, the cells marked in grey indicate the consultation or involvement in social dialogue, and the cells marked in blue indicate the type of collective bargaining the organisation is involved in.

Source: Network of Eurofound Correspondents, 2020

There are 13 ATCEUC-affiliated trade unions that are consulted by their national governments in 12 Member States. Eight ATCEUC-affiliated trade unions are involved in social dialogue bodies. For seven of them in six Member States this is bipartite social dialogue, while one is involved in tripartite social dialogue (in Poland).

The vast majority of ATCEUC's 22 affiliated trade unions are involved in sector-related multi- and/or single-employer collective bargaining. The seven countries without sector-related ATCEUC members are Austria, Czechia, Estonia, Hungary, Latvia, Slovakia and Sweden. All Member States with ATCEUC affiliates have exactly one member trade union, except Belgium and Greece, which are each home to two affiliates. One of the two affiliates in Belgium (BGATCo), the only affiliate in Luxembourg (LGATC) and both affiliates in Greece (EEKE and HACU) are not involved in collective bargaining. All other ATCEUC affiliates engage in sector-related collective bargaining, mostly at the company level.

6.3.4. ATCEUC's autonomy and capacity to negotiate

ATCEUC was established in 1989, initially to represent only ATCOs; now it also represents engineers and technicians for ATM systems (ATSEP). ATCEUC has been a member of the ESSDC's ATM working group since 2011. For the ESSDC's plenary meetings, ETF invites ATCEUC, based on a 2009 cooperation agreement between the two organisations. According to Article 3.5 in the ATCEUC statutes, representing member trade unions in the ESSDC is one method to achieve the organisation's objectives. According to the ATCEUC

⁵¹ SNCTA indicates there could also be some involvement in tripartite social dialogue with FABEC; however, this is not listed in Table 31 in section 4.3.

website, the aim of the organisation is to promote the views of its member trade unions at European level and to pool their resources and expertise with regard to technical and social issues. ATCEUC also has member unions outside the EU27. In 2020, ATCEUC was composed of 32 national trade unions representing more than 14,000 ATCOs and ATSEPs in 30 European countries. ATCEUC is affiliated to CESI.

All of ATCEUC's activities are 100% financed by membership fees. Its travel and accommodation expenses incurred through participation in ESSDC meetings are reimbursed by the European Commission, just as they are for participation in expert group meetings and SESAR activities. SESAR is the European air traffic control infrastructure modernisation programme. ATCEUC employs 14 staff at its secretariat, of which eight are regularly involved in ESSDC activities. The ATCEUC website does not contain a members-only section.

ATCEUC indicates that it has the capacity to negotiate agreements on behalf of its members. It has a standard mandating procedure and an ad hoc procedure to decide on European social dialogue texts, though neither the standard procedure nor the ad hoc one is applied for most of the ESSDC-adopted texts. A case-by-case assessment is made for each proposed ESSDC text. Normally, the ATCEUC executive board is involved in providing a mandate/approving texts or initiatives. A consensus among the members of the board is necessary to approve an ATCEUC position. The general assembly is also often involved. Twice a year, an ATCEUC general assembly is organised. The ATCEUC executive board is responsible for identifying elements of particular importance for which a specific mandate or approval process is necessary. The executive board is discharged from all the decisions taken at the two annual general assemblies. It is elected by the member unions. Executive board officers speak and act on behalf of the members, and their actions are reviewed twice a year by a plenary meeting where ATCEUC policies are decided, and actions, strategies and targets are set. The executive board decides how to implement the ATCEUC policies.

An example was provided of how ATCEUC handled the internal mandating and decision-making process regarding the 22 October 2020 joint statement on payroll support schemes for the aviation sector in response to the COVID-19 pandemic. In the months before the adoption of this text, ATCEUC organised several virtual meetings to inform member trade unions of the economic situation in the aviation sectors. The executive board defined a general guideline, which was approved by all ATCEUC members. Once a draft of the text was made, the executive board reviewed and approved it. It was then signed by the ATCEUC president on behalf of the organisation and all its affiliated trade unions. A post-signing endorsement took place at the following ATCEUC general assembly, where the executive board was discharged from the decisions taken.

ATCEUC has a working group to deal with matters related to social dialogue and working conditions. This group is composed of the president and members of the board. This group, which has no specific name, is relatively small, so it is easy for members to collaborate. The president of ATCEUC tasks members of the group with specific subjects. There are also three other ATCEUC working groups that are occasionally involved in ESSDC activities: one deals with EASA subjects, one is related to activities of the Expert Group on the Human Dimension of the Single European Sky and one addresses SESAR activities.⁵²

Apart from its statutes, ATCEUC has detailed rules and procedures, in which all internal procedures, structures and decision-making mechanisms are formally clarified. It also includes information on the ATCO committee representing the ATCOs' interests, and the ATSEP committee for specific ATSEP activities within ATCEUC.

To realise its goals, ATCEUC relies on close cooperation with other European organisations and bodies, in particular with Eurocontrol and the European Commission. ATCEUC became a recognised participant in the

⁵² ATCEUC and CANSO are involved in several European activities that are not related to the ESSDC, for example the SESAR JU, TSG, EASA TEC, EASC and ATM Partners.

civil aviation ESSDC following a cooperation agreement between ETF and ATCEUC from 18 June 2009. Together with other recognised social partner organisations in the ESSDC, ATCEUC jointly developed and published a number of texts and documents, including *Toolbox for successful social dialogue in air traffic management* with ETF and CANSO in 2015, *Change management in the ATM industry – Principles and process* with the same partner organisations in 2018, and the ATM Partners *Just culture toolbox* co-authored with ETF, CANSO and other international organisations in 2018.

6.4. National civil aviation trade unions not represented in the ESSDC

A total of 59 sector-related trade unions in 20 Member States can be identified that are not affiliated to any of the relevant European-level organisations – ETF, ECA, ATCEUC and EurECCA – and thus not represented in the ESSDC. An overview of these organisations is provided in Table 69. All of the 59 trade unions not represented in the ESSDC are involved in collective bargaining; otherwise, they would not have been considered in this study. Most of these trade unions represent workers in ground handling activities, and very few of them represent a significant portion of the civil aviation sector. Although some trade unions not represented in the ESSDC – such as TGL/IGL of Germany, OPAM of Greece, FNSA of Romania and handful of unions in Portugal – have a significant membership base, it appears from Table 69 and Table 70 that the biggest and most influential trade unions in virtually all Member States are affiliated to at least one of the relevant European trade union organisations.

Table 69: Detailed membership domain of the trade unions not represented in the ESSDC

Member State	Trade union	Pilots, passenger	Pilots, freight	Cabin crew	ATCOS	ATSEP	Other ATM staff	Baggage handling	Ticket desk, check-in and boarding	Airport security	Aircraft maintenance	Airport fire services	Services to aircraft, fuel, catering, pushbacks
AT	ACA	yes											
AT	Vida	yes		yes	yes	yes	yes	yes		yes	yes	yes	yes
AT	GPA-djp								yes				
AT	GPF				yes	yes	yes						
BE	BBTK-SETCa	yes	yes	yes	yes	yes	yes		yes	yes	yes	yes	yes
BE	ACLVB-CGSLB	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes
BE	ACV Puls	yes	yes	yes	yes	yes	yes		yes	yes	yes	yes	yes
BE	ACV-CSC CNE	yes	yes	yes	yes	yes	yes		yes	yes	yes	yes	yes
BE	BeCA	yes	yes			yes		yes		yes	yes	yes	yes
BE	ABVV-FGTB BTB-UBT							yes		yes	yes	yes	yes
BE	ACV-CSC Transcom							yes		yes	yes	yes	yes
BE	BGATCo				yes	yes	yes						
BG	FTTUB				yes	yes	yes	yes	yes	yes	yes		yes
BG	FTW-CL Podkrepa												
BG	BATCoU				yes								
CY	OIYK-SEK							yes	yes		yes		yes
CY	PASEY-PEO							yes	yes		yes		yes
CY	CYATCoU				yes		yes						
CY	PASYDY				yes		yes						
CY	SYCHTHEM-DEOK							yes	yes		yes		yes
CZ	OOPL	yes		yes									
CZ	CZALPA	yes											
CZ	OSD					yes		yes	yes	yes		yes	
CZ	OSZL								yes		yes		yes
CZ	CZATCoA				yes		yes						

Member State	Trade union	Pilots, passenger	Pilots, freight	Cabin crew	ATCOs	ATSEP	Other ATM staff	Baggage handling	Ticket desk, check-in and boarding	Airport security	Aircraft maintenance	Airport fire services	Services to aircraft, fuel, catering, pushbacks
CZ	PV OSD						yes						
CZ	CZATSEA					yes	yes						
DE	ver.di	yes	yes	yes	yes			yes	yes	yes	yes	yes	yes
DE	VC	yes	yes										
DE	UFO			yes									
DE	dbb				yes	yes	yes	yes		yes			
DE	GdF				yes	yes	yes						yes
DE	TGL/IGL										yes		
DE	GdP									yes			yes
DK	FPU	yes	yes	yes									
DK	DALPA	yes											
DK	CUD			yes									
DK	HK Privat						yes		yes	yes			
DK	3F							yes		yes		yes	yes
DK	Dansk Metal										yes		
DK	DATCoA				yes	yes	yes						
EE	ETTA										yes		
EE	EstATCoA				yes								
EL	RACU			yes									
EL	EEEEKE				yes								
EL	HACU				yes								
EL	OSYPA					yes	yes				yes	yes	
EL	OPAM						yes	yes	yes	yes	yes	yes	yes
ES	SEPLA	yes	yes										
ES	FSC-CCOO	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes		
ES	FeSMC-UGT	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes		

Member State	Trade union	Pilots, passenger	Pilots, freight	Cabin crew	ATCOs	ATSEP	Other ATM staff	Baggage handling	Ticket desk, check-in and boarding	Airport security	Aircraft maintenance	Airport fire services	Services to aircraft, fuel, catering, pushbacks
ES	FS-USO	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes		
ES	SITCPLA			yes									
ES	STAVLA			yes									
ES	USCA				yes								
FI	AKT/SLSY			yes									
FI	FPA	yes											
FI	YTY	yes			yes								
FI	Pro			yes				yes		yes	yes		
FI	IAU							yes	yes	yes	yes		yes
FI	JHL							yes	yes	yes		yes	yes
FI	SLJY				yes								
FR	FEETS-FO	yes	yes	yes				yes	yes	yes	yes		yes
FR	SNPNC			yes									
FR	FNEMA-CFE CGC			yes				yes	yes		yes		yes
FR	UNSA Transport			yes	yes	yes	yes	yes	yes	yes	yes	yes	yes
FR	CGT Transports		yes	yes		yes	yes	yes	yes		yes	yes	yes
FR	FGT CFTC	yes						yes	yes				
FR	SNPL	yes	yes	yes									
FR	SPAF	yes											
FR	ALTER	yes											
FR	SNPNAC			yes									
FR	SNCTA				yes	yes	yes						
FR	USAC				yes	yes	yes						
FR	FGTE-CFDT	yes	yes	yes	yes	yes	yes	yes	yes		yes	yes	yes
FR	CGT Commerce								yes	yes			yes
FR	CGT Ports et Docks							yes	yes		yes		yes

Member State	Trade union	Pilots, passenger	Pilots, freight	Cabin crew	ATCOs	ATSEP	Other ATM staff	Baggage handling	Ticket desk, check-in and boarding	Airport security	Aircraft maintenance	Airport fire services	Services to aircraft, fuel, catering, pushbacks
FR	CGT Service Public					yes	yes	yes	yes		yes	yes	yes
FR	SUD Aérien							yes	yes	yes	yes	yes	yes
HR	ORCA	yes		yes							yes		
HR	SKOZ	yes		yes			yes						
HR	HSPP	yes		yes			yes						
HR	SHSZUZ						yes	yes	yes		yes		yes
HR	SZTH						yes	yes	yes		yes		yes
HR	SSDUZ										yes		yes
HR	CATCoU				yes	yes					yes		
HR	SDHKZP				yes	yes					yes		
HR	SRAZ					yes	yes	yes	yes	yes			yes
HR	NSSZZLD						yes	yes	yes	yes	yes		
HR	NSSZLSK						yes	yes	yes		yes		yes
HU	HUNALPA	yes	yes										
HU	RDSZSZ									yes	yes		yes
HU	RMFSz										yes		yes
HU	LESZ					yes		yes	yes	yes			yes
HU	LIGOSZ						yes						
HU	IDFSZ					yes							
HU	Control MLISZ				yes								
IE	IALPA	yes	yes										
IE	Forsa			yes	yes	yes	yes						
IE	SIPTU			yes			yes	yes	yes	yes	yes	yes	yes
IT	FIT-CISL	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes
IT	FILT-CGIL	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes
IT	UIL Trasporti	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes

Member State	Trade union	Pilots, passenger	Pilots, freight	Cabin crew	ATCOs	ATSEP	Other ATM staff	Baggage handling	Ticket desk, check-in and boarding	Airport security	Aircraft maintenance	Airport fire services	Services to aircraft, fuel, catering, pushbacks
IT	UGL Trasporto Aereo	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes
IT	ANPAC	yes	yes	yes									
IT	ANPAV	yes	yes	yes									
IT	Unica				yes	yes	yes						
LT	LPSDPS									yes			
LT	LATCoA				yes		yes						
LU	SAC-OGBL	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes
LU	ALPL-LCGB	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes
LU	NGL-SNEP	yes	yes	yes									
LU	LGATCo				yes								
LV	LAA	yes		yes					yes				
LV	LAAF	yes		yes	yes			yes	yes	yes	yes		yes
LV	LADA				yes	yes	yes						
MT	UCC			yes									
MT	ALPA	yes											
MT	GWU			yes		yes	yes	yes	yes	yes	yes	yes	yes
MT	MATCoA												
NL	VNC			yes									
NL	VNV	yes	yes										
NL	FNV Cabine			yes									
NL	FNV Luchtvaart						yes	yes	yes				yes
NL	CNV Vakmensen							yes	yes	yes	yes		yes
NL	De Unie							yes	yes	yes			yes
NL	VKP							yes	yes		yes		yes
NL	VNLG				yes								
NL	VPS							yes		yes		yes	

Member State	Trade union	Pilots, passenger	Pilots, freight	Cabin crew	ATCOs	ATSEP	Other ATM staff	Baggage handling	Ticket desk, check-in and boarding	Airport security	Aircraft maintenance	Airport fire services	Services to aircraft, fuel, catering, pushbacks
NL	NVLT					yes					yes		yes
PL	ZZPPiL			yes									
PL	ZZPK PLL LOT SA	yes											
PL	KM NSZZ Solidarność PLL LOT	yes		yes									
PL	ZZKRL				yes								
PL	KSPTLiOL							yes	yes		yes	yes	
PL	ZZKLW				yes								
PT	SPAC	yes	yes										
PT	APPLA	yes	yes										
PT	SIPLA	yes											
PT	SNPVAC			yes									
PT	SITAVA						yes	yes	yes		yes		yes
PT	STHA							yes	yes		yes		yes
PT	SINCTA				yes		yes						
PT	SITECSA				yes		yes						
PT	SIMA						yes				yes		
PT	SINTAC						yes	yes	yes		yes		yes
PT	SQAC						yes	yes	yes		yes		yes
PT	SINDAV							yes	yes		yes		yes
PT	SITEMA										yes		
RO	FNSA	yes		yes									
RO	SNTT							yes	yes	yes	yes	yes	
RO	ATSR				yes	yes	yes						
RO	FSA				yes	yes	yes						
SE	Unionen			yes				yes	yes	yes	yes		yes
SE	SPF	yes	yes										

Member State	Trade union	Pilots, passenger	Pilots, freight	Cabin crew	ATCOs	ATSEP	Other ATM staff	Baggage handling	Ticket desk, check-in and boarding	Airport security	Aircraft maintenance	Airport fire services	Services to aircraft, fuel, catering, pushbacks
SE	SEKO							yes		yes	yes	yes	yes
SE	STF							yes		yes	yes	yes	yes
SE	ST				yes	yes	yes		yes				
SE	Kommunal											yes	
SI	SSAL							yes	yes			yes	yes
SI	SAL							yes	yes			yes	yes
SI	SPGAE							yes	yes			yes	yes
SI	SAITS				yes	yes	yes						
SI	SATS				yes	yes	yes						
SI	SSKL				yes	yes	yes						
SK	IOZ							yes	yes	yes	yes	yes	yes
Total	166 trade unions												

Source: Network of Eurofound Correspondents, 2020 and direct feedback from social partners

Table 70: Trade unions not represented in the ESSDC and their involvement in collective bargaining, consultation procedures and social dialogue, 2020

Member State	Trade union	Collective bargaining involvement													Consultation	Social dialogue body		Type of organisation	Representativeness of organisation	National affiliation	European affiliation
		Pilots NACE 51.10	Pilots NACE 51.21	Cabin crew	ATCOs	ATSEP	Other ATM	Baggage handling	Ticket desk/check-in	Airport security	Aircraft maintenance/overhaul	Airport fire services	Services such as fuel, catering, de-icing	Air transport activities (NACE 51.10 + 51.21)		Bipartite	Tripartite				
AT	GPA-djp	no	no	no	no	no	no	no	yes	no	no	no	no	no	n.a.	n.a.	n.a.	TU	MR + LC	ÖGB	no
BE	ACV-CSC CNE	yes	yes	yes	yes	yes	yes	no	yes	yes	yes	yes	yes	yes	yes	yes	no	TU	LC	ACV-CSC	no
CY	OIYK-SEK	no	no	no	no	no	no	yes	yes	no	yes	no	yes	no	no	yes	no	TU	no	SEK	no
CY	PASEY-PEO	no	no	no	no	no	no	yes	yes	no	yes	no	yes	no	no	yes	no	TU	no	PEO	no
CY	PASYDY	no	no	no	yes	no	yes	no	no	no	no	no	no	no	yes	yes	no	TU	yes	no	no
CY	SYCHTHEM-DEOK	no	no	no	no	no	no	yes	yes	no	yes	no	yes	no	no	yes	no	TU	MR	DEOK	no
CZ	OOPL	yes	no	yes	no	no	no	no	no	no	no	no	no	yes	no	no	no	TU	MR	no	no
CZ	OSZL	no	no	no	no	no	no	no	yes	no	yes	no	yes	no	no	no	no	TU	MR	CMKOS	no
DE	dbb	no	no	no	no	no	no	yes	no	yes	no	no	no	no	yes	no	yes	TU	MR	dbb	no
DE	TGL/IGL	no	no	no	no	no	no	no	no	no	yes	no	no	no	no	no	no	TU	n.a.	no	no
DE	GdP	no	no	no	no	no	no	no	no	yes	no	no	no	no	yes	no	yes	TU	MR	DGB	no
EL	OPAM	no	no	no	no	no	yes	yes	yes	yes	yes	yes	yes	no	no	yes	yes	TU	LC	GSEE	no
FR	SPAF	yes	no	no	no	no	no	no	no	no	no	no	no	yes	no	no	no	TU	n.a.	no	no
FR	ALTER	yes	no	no	no	no	no	no	no	no	no	no	no	yes	no	no	no	TU	n.a.	no	no
FR	CGT Commerce	no	no	no	no	no	no	no	yes	yes	no	no	yes	no	yes	yes	no	TU	LC	CGT	no
FR	CGT Ports et Docks	no	no	no	no	no	no	yes	yes	no	yes	no	yes	no	no	yes	no	TU	LC	CGT	no
FR	FNEMA-CFE CGC	no	no	yes	no	no	no	yes	yes	no	yes	no	yes	yes	yes	yes	no	TU	LC	CFE-CGC	no
FR	SUD Aérien	no	no	no	no	no	no	yes	yes	yes	yes	yes	yes	no	yes	yes	no	TU	LC	no	no
HR	SHSZUZ	no	no	no	no	no	yes	yes	yes	no	yes	no	yes	no	no	yes	no	TU	LC	URSH	no
HR	ORCA	yes	no	yes	no	no	no	no	no	no	yes	no	no	yes	yes	yes	no	TU	LC	HUS	no
HR	SZTH	no	no	no	no	no	yes	yes	yes	no	yes	no	yes	no	no	yes	no	TU	LC	no	no
HR	SSDUZ	no	no	no	no	no	no	no	no	no	yes	no	yes	no	no	yes	no	TU	LC	ITUC	no
HR	SDHKZP	no	no	no	yes	yes	no	no	no	no	yes	no	no	no	no	yes	no	TU	LC	no	no
HR	SRAZ	no	no	no	no	yes	yes	yes	yes	yes	no	no	yes	no	no	yes	no	TU	LC	ITUC	no
HR	NSSZZLD	no	no	no	no	no	yes	yes	yes	yes	no	yes	yes	no	no	no	no	TU	LC	ITUC	no
HR	NSSZLSK	no	no	no	no	no	yes	yes	yes	no	yes	no	yes	no	no	yes	no	TU	LC	ITUC	no
HU	LIGOSZ	no	no	no	no	no	yes	no	no	no	no	no	no	no	no	yes	no	TU	no	no	no
HU	IDFSZ	no	no	no	no	yes	no	no	no	no	no	no	no	no	no	yes	no	TU	MR	no	no

Member State	Trade union	Collective bargaining involvement													Consultation	Social dialogue body		Type of organisation	Representativeness of organisation	National affiliation	European affiliation
		Pilots NACE 51.10	Pilots NACE 51.21	Cabin crew	ATCOs	ATSEP	Other ATM	Baggage handling	Ticket desk/check-in	Airport security	Aircraft maintenance/overhaul	Airport fire services	Services such as fuel, catering, de-icing	Air transport activities (NACE 51.10 + 51.21)		Bipartite	Tripartite				
IT	ANPAV	yes	yes	yes	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	yes	no	no	PA	MR	ORSA	no
IT	UGL Trasporto Aereo	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	no	no	TU	MR	UGL	no
LT	LPSDPS	no	no	no	no	no	no	no	no	yes	no	no	no	no	yes	no	no	TU	MR	LPSK	no
LV	LAAF	yes	no	yes	yes	no	no	yes	yes	yes	yes	no	yes	yes	yes	no	no	TU	LC	LBAS	no
LV	LADA	no	no	no	yes	yes	yes	no	no	no	no	no	no	no	no	no	no	TU	no	no	no
MT	UHM	no	no	no	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	no	yes	no	no	TU	LC	CMTU	no
NL	De Unie	no	no	no	no	no	no	yes	yes	yes	no	no	yes	no	n.a.	yes	n.a.	TU	MR	no	no
NL	VKP	no	no	no	no	no	no	yes	yes	no	yes	no	yes	no	n.a.	yes	n.a.	TU	MR	VCP	no
NL	VPS	no	no	no	no	no	no	yes	no	yes	no	yes	no	no	no	yes	no	TU	MR	CMHF	no
NL	NVLT	no	no	no	no	yes	no	no	no	no	yes	no	yes	no	yes	yes	no	TU	MR	no	no
PL	ZZKLW	no	no	no	yes	no	no	no	no	no	no	no	no	no	n.a.	no	n.a.	TU	n.a.	no	no
PL	ZZNPL	no	no	no	no	no	no	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	no	n.a.	no	n.a.	TU	n.a.	no	no
PT	SPAC	yes	yes	no	no	no	no	no	no	no	no	no	no	yes	n.a.	n.a.	n.a.	TU	MR	no	no
PT	SIPLA	yes	no	no	no	no	no	no	no	no	no	no	no	yes	no	no	no	TU	MR	no	no
PT	STHA	no	no	no	no	no	no	yes	yes	no	yes	no	yes	no	yes	no	no	TU	MR	no	no
PT	SITECSA	no	no	no	yes	no	yes	no	no	no	no	no	no	no	no	no	no	TU	MR	no	no
PT	SIMA	no	no	no	no	no	yes	no	no	no	yes	no	no	no	no	no	no	TU	MR	no	no
PT	SINTAC	no	no	no	no	no	yes	yes	yes	no	yes	no	yes	no	no	no	no	TU	MR	no	no
PT	SQAC	no	no	no	no	no	yes	yes	yes	no	yes	no	yes	no	no	no	no	TU	MR	UGT	no
PT	SINDAV	no	no	no	no	no	no	yes	yes	no	yes	no	yes	no	no	no	no	TU	MR	UGT	no
PT	SITEMA	no	no	no	no	no	no	no	no	no	yes	no	no	no	no	no	no	TU	MR	UGT	no
RO	FNSA	yes	no	yes	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	yes	yes	no	no	TU	LC	CNS Cartel Alfa	no
RO	FSA	n.a.	n.a.	n.a.	yes	yes	yes	no	no	no	no	no	no	no	n.a.	no	no	TU	LC	CNS Meridian	no
SE	Kommunal	no	no	no	no	no	no	no	no	no	no	yes	no	no	no	no	no	TU	MR	LO	no
SI	SSAL	no	no	no	no	no	no	yes	yes	no	no	yes	yes	no	no	no	no	TU	LC	no	no
SI	SAL	no	no	no	no	no	no	yes	yes	no	no	yes	yes	no	no	no	no	TU	LC	KS-90	no
SI	SPGAE	no	no	no	no	no	no	yes	yes	no	no	yes	yes	no	no	no	no	TU	LC	ZSSS	no
SI	SAITS	no	no	no	yes	yes	yes	no	no	no	no	no	no	no	no	no	no	TU	LC	no	no
SI	SATS	no	no	no	yes	yes	yes	no	no	no	no	no	no	no	no	no	no	TU	LC	KS-90	no

Member State	Trade union	Collective bargaining involvement													Consultation	Social dialogue body		Type of organisation	Representativeness of organisation	National affiliation	European affiliation
		Pilots NACE 51.10	Pilots NACE 51.21	Cabin crew	ATCOs	ATSEP	Other ATM	Baggage handling	Ticket desk/check-in	Airport security	Aircraft maintenance/overhaul	Airport fire services	Services such as fuel, catering, de-icing	Air transport activities (NACE 51.10 + 51.21)		Bipartite	Tripartite				
SK	IOZ	no	no	no	no	no	no	yes	yes	yes	yes	yes	yes	no	yes	no	yes	TU	LC	KOZ SR	no
SK	MOZRLP SR	no	no	no	yes	n.a.	n.a.	no	no	no	no	no	no	no	n.a.	n.a.	n.a.	TU	n.a.	no	no

Source: Network of Eurofound Correspondents, 2020

6.5. Other European organisations with affiliated civil aviation trade unions

An overview of national civil aviation trade unions' affiliation to European-level associations represented in the ESSDC is provided in Table 71. However, not all sector-related trade unions are affiliated to the European-level social partner organisations currently involved in the ESSDC (ETF, ECA and ATCEUC). Some are affiliated to one or more European organisations other than those three or are members of one of the three ESSDC participant organisations as well as another organisation at European level. However, as Table 71 shows, most sector-related trade unions in most Member States have no, or relatively few, affiliations to European associations other than ETF, ECA and ATCEUC – bearing in mind that the information on affiliations provided by the Network of Eurofound Correspondents can be incomplete.

The national contributions to this study provided by the Network of Eurofound Correspondents have identified sector-related trade union affiliations to only five organisations other than ETF, ECA and ATCEUC. These are EurECCA, CESI, EFFAT, EPSU and UNI Europa. With regard to the civil aviation sector, these affiliations result from overlapping membership domains of the unions, which organise workers in other industries and sectors. Trade unions' membership of European associations other than the three civil aviation ESSDC participants is thus based on membership domains that are not related to the civil aviation sector. Hence, it can be concluded that there are no other European trade union associations with representativeness in the sector comparable to that of ETF, ECA and ATCEUC.

Table 71: Other EU-level associations with civil aviation sector national trade unions as members, 2020

Other EU trade union organisations			Member States with an affiliate according to organisation website	Member States with a civil aviation sector affiliate
Abbreviation	Full name	Assessment of sector-relatedness		
EurECCA	European Cabin Crew Association	EurECCA focuses on cabin crew only. It claims on its website to represent 70% of all cabin crew in Europe, with more than 33,000 affiliated trade union members in 8 countries. The affiliation of the Irish trade union Impact Forsa has not been confirmed by this study	6 (DE, EL, ES, IT, NL, PT) RACU (EL) is affiliated but not involved in collective bargaining	6 trade unions in 6 Member States, of which 5 are involved in collective bargaining in 5 Member States: UFO (DE), Stavla (ES), ANPAC (IT), VNC (NL) and SNPAC (PT) engage in collective bargaining
CESI	European Confederation of Independent Trade Unions	CESI is an organisation bringing together independent trade union organisations with a special focus on public sector workers. ATCEUC is also a member of CESI	15	2 trade unions in 2 Member States: DE (dbb), IT (Unica)
EFFAT	European Federation of Food, Agriculture and Tourism Trade Unions	EFFAT represents and defends the interests of workers in the food, agriculture and tourism industries	25	3 trade unions in 2 Member States: AT (Vida), ES (FSC-CCOO and FeSMC-UGT)
EPSU	European Public Service Union	EPSU organises public service workers in various public sector services	27	3 trade unions in 2 Member States: AT (Vida), DE (ver.di), FI (JHL)
UNI Europa	European Services Workers Union	UNI Europa organises and represents workers in a broad range of private sector services	27	3 trade unions in 2 Member States: AT (Vida), ES (FSC-CCOO and FeSMC-UGT)

Source: Authors' own elaboration based on the Network of Eurofound Correspondents, 2020

The appearance of EPSU and CESI with each affiliated aviation trade union in two Member States may point to the multisectoralism between ATM activities and public sector trade unions. For EFFAT, there is multisectoralism with catering and tourism, and for UNI Europa with private security and commerce.

EurECCA is the only other European organisation with affiliated trade unions involved in collective bargaining in more than five Member States, which is why it is analysed in detail (below).

6.5.1. EurECCA membership representation and composition

EurECCA works specifically on behalf of cabin crew in Europe. Founded in Brussels in 2014, it is currently made up of eight cabin crew unions from seven Member States. They all hold the status of full members, with the goal of improving living and working conditions for flight attendants throughout Europe.

EurECCA is not a recognised European social partner organisation, and therefore not allowed to participate in the ESSDC. As an organisation, it is working towards recognition in order to be regularly consulted within the framework of sectoral social dialogue at European level. EurECCA concentrates on a number of policies, such as reasonable flight time limitation for cabin crew, a European cabin crew licence, labour contracts, and occupational health and safety matters – with a special emphasis on the last since the outbreak of the COVID-19 pandemic.

The EurECCA Conference serves as a general assembly for official decisions and positions and for the appointment of posts such as the president, vice-president and general-secretary, as well as the other board members. The conference also decides on constitutional changes, budget and membership issues. The organisation is managed by the board, of which up to seven members come from the member trade unions. The board is headed by three executive directors: the president, the vice-president and the general secretary. EurECCA working groups advise the board on more technical aspects of topics and decisions being considered.⁵³

EurECCA's six member trade unions come from Germany, Greece, Italy, the Netherlands, Portugal and Spain. Five of these trade unions, with the exception of RACU in Greece, are involved in sector-related single-employer bargaining.

While all six trade unions affiliated to EurECCA organise and represent cabin crew, one of them also represents other workers in the civil aviation sector: ANPAC in Italy covers pilots. ANPAC is already represented in the ESSDC through its membership of ECA, but only for the pilots it organises, as cabin crew members are not represented by ECA. The other five EurECCA members included in this study are affiliated exclusively to this organisation, and as such not represented on the ESSDC. In conclusion, all six EurECCA trade unions are involved in collective bargaining and form unique representativeness for EurECCA as they organise cabin crew who are not represented in the ESSDC through any other European trade union organisation participating in the ESSDC.

⁵³ More information is available at <https://eurecca.eu/who-we-are>

Table 72: EurECCA membership domain and composition

Member State	Trade union	Occupations covered (NACE codes)					EU-level affiliation				Collective bargaining involvement
		Pilots (51.10 + 51.21)	Cabin crew (51.10)	ATCOs (52.23)	ATSEP and other ATM (52.23)	Ground handling (52.23)	ETF	ECA	EurECCA	ATCEUC	
DE	UFO		yes					yes		SEB	
EL	RACU		yes					yes		Ryanair reported to have an agreement with RACU	
ES	STAVLA		yes					yes		SEB	
IT	ANPAC	yes	yes					yes	yes	SEB	
NL	VNC		yes					yes		SEB	
PT	SNPVAC		yes					yes		SEB	

Notes: SEB, single-employer bargaining. Green cells indicate a positive response. Light blue cells indicate involvement in single-employer bargaining only.

Source: Network of Eurofound Correspondents, 2020

EurECCA claims to represent 70% of all European cabin crew, but a careful analysis leads us to conclude that this is overestimated and that 15–20% of all organised aircrew would be more realistic. The six countries with EurECCA member trade unions that could be confirmed represent almost 55% of the European civil aviation workforce. ETF also has affiliated trade unions in Germany, Italy, Spain and the Netherlands that organise cabin crew, but not in Greece and Portugal. In Portugal and the Netherlands, the trade union organising most of the cabin crew is affiliated to EurECCA. In Germany (ver.di) and Spain (SEPLA), however, the trade union with most members among cabin crew is only affiliated to ETF. In Spain the EurECCA-affiliated trade union STAVLA reported about 1,000 affiliated cabin crew, while SEPLA (affiliated to ETF) reported 6,000 affiliated aircrew, about 2,000 pilots and about 4,000 cabin crew. For Germany, UFO organises most cabin crew from Lufthansa, but the cabin crew of Eurowings, Ryanair, EasyJet and other airlines operating in Germany are all organised by ver.di. Taking, all cabin crew employed in Germany, the trade union having most cabin crew members affiliated must thus be ver.di.

Taking all this into consideration leads to an estimate of about 15–20% of all organised cabin crew who could be affiliated to a trade union that is a member of EurECCA. Given the trade union density rates reported in Table 15, a more realistic estimate would be that EurECCA represents some 5% of European cabin crew employees.

6.6. Comparative analysis of the representativeness of ETF, ECA, ATCEUC and EurECCA

Table 73 compares the representativeness of the European trade union organisations for the civil aviation sector. In terms of absolute numbers, ETF has the strongest representativeness, with 69 affiliated trade unions. Its affiliates are spread across 23 Member States. In all of these countries but one, ETF counts at least one member union involved in collective bargaining. A full 91% of all sector-related ETF members engage in collective bargaining. The main reason for ETF’s high representativeness in the sector is its all-encompassing industry representation. In relative terms, ETF is particularly representative among cabin crew: 70% of all trade unions representing cabin crew are affiliated to ETF. And 51 of the 69 ETF affiliates (74%) represent ground handling staff, which is 56% of all trade unions representing employees in ground handling activities.

Table 73: Comparative analysis of the representativeness of the European trade union organisations with members in the civil aviation sector

Organisation	TUs in total	Type of affiliation/coverage	Occupations covered (NACE codes)					TU involvement in collective bargaining
			Pilots (51.10 + 51.21)	Cabin crew (51.10)	ATCOs (52.23)	ATSEP and other ATM (52.23)	Ground handling (52.23)	
All TUs	166	Number of TUs covering this part of the civil aviation sector	47	47	58	63	91	154
	27 MSs	Coverage in terms of countries	20	21	26	25	27	27
ETF	63	Number of TUs affiliated to ETF	19	33	28	37	51	63
	% of 63	Proportion of TUs affiliated to ETF	28	48	41	54	74	91
	41% of all TUs in the sector	Proportion of all TUs with coverage	40	70	48	59	56	41
	22 MSs	Coverage in terms of countries	9	15	15	19	21	21
ECA	20	Number of TUs affiliated to ECA	20	3	1	0	1	15
	% of 20	Proportion of TUs affiliated to ECA	100	16	5	0	5	79
	11% of all TUs in the sector	Proportion of all TUs with coverage	40	6	2	0	1	10
	18 MSs	Coverage in terms of countries	18	3	1	0	1	14
ATCEUC	23	Number of TUs affiliated to ATCEUC	0	1	20	10	3	17
	% of 23	Proportion of TUs affiliated to ATCEUC	0	5	91	45	14	82
	13% of all TUs in the sector	Proportion of all TUs with coverage	0	2	34	16	3	11
	20 MSs	Coverage in terms of countries	0	1	19	9	3	15
EurECCA	6	Number of TUs affiliated to EurECCA	1	6	1	1	2	5
	% of 6	Proportion of TUs affiliated to EurECCA	13	100	13	13	25	88
	5% of all TUs in the sector	Proportion of all TUs with coverage	2	17	2	2	2	5
	6 MSs	Coverage in terms of countries	1	6	1	1	1	5

Notes: MS, Member State; TU, trade union. EurECCA is not a recognised European trade union organisation and does not participate in the civil aviation ESSDC.

Source: Network of Eurofound correspondents, 2020

ECA as the specific voice of pilots at European level records significantly lower representativeness than ETF in terms of absolute numbers with regard to the whole civil aviation sector; however, it is highly representative with regard to the group of workers it represents. ECA counts 20 member trade unions in 18 Member States and thus represents 40% of trade unions that organise pilots and 86% of countries that are home to trade unions representing pilots. Some 79% of all ECA members are involved in sector-related collective bargaining.

Like ECA, ATCEUC's membership base is specific, representing trade unions organising primarily ATC workers and secondarily ATSEP staff at European level. ATCEUC counts 22 affiliated trade unions from 20 Member States and is thus highly representative in the ATC and ATSEP ATM subsectors. Of the 58 trade unions representing ATC workers, 20 (34%) are affiliated to ATCEUC, among which are the largest. Some 82% of the ATCEUC members are involved in sector-related collective bargaining.

EurECCA is the European trade union association with the lowest representativeness in terms of absolute numbers of members and countries covered. It aims to represent the largest national unions for cabin crew; however, with its six affiliates from six Member States, it represents only 11% of all trade unions that organise cabin crew, and about 15–20% of all organised cabin crew members. Five of the six EurECCA members engage in collective bargaining and can thus be regarded as industrial relations actors in the sector in Germany, Spain, Italy, the Netherlands and Portugal.

When considering the two largest trade unions (in terms of membership) in each subsector and country (see Table 74), it is evident that the relevant European-level social partner organisations tend to organise the largest trade unions within their respective domains. This is, in particular, important for the representativeness of the highly specialised European associations, with a membership domain covering only specific, well-demarcated parts of the sector: ECA, ATCEUC and EurECCA. In particular, ECA and ATCEUC tend to represent the largest trade unions within their respective domains in those countries where they have affiliates. This is also true of EurECCA, although it covers only a few countries through affiliations. ETF tends to represent the largest trade unions in those segments of the sector where no other European trade union organisation competes for the same constituency, such as in ground handling activities. Moreover, ETF organises the strongest unions representing cabin crew in many of those countries where EurECCA has not got a foothold. EurECCA is not a recognised European trade union organisation and does not participate in the civil aviation ESSDC.

Table 74: European affiliations of the largest and second-largest civil aviation trade unions by subsector

Member State	Largest trade unions organising pilots and their affiliations to ETF and ECA		Largest trade unions organising cabin crew and their affiliations to ETF and EurECCA		Largest trade unions organising ATCOs and their affiliations to ETF and ATCEUC		Largest trade unions organising ground handling staff and their affiliations to ETF	
	Largest	Second largest	Largest	Second largest	Largest	Second largest	Largest	Second largest
AT	Vida: ETF	ACA: ECA	Vida: ETF	none	Vida: ETF	GPF: ETF	Vida: ETF	GPA
BE	BBTK-SETCa: ETF	ACV-CSC CNE: ETF	BBTK-SETCa: ETF	ACV-CSC CNE: ETF	BGATCo: ATCEUC ⁵⁴	ACV-CSC-Transcom: ETF	BTB-UTB: ETF	ACV-CSC: ETF
BG	none	none	none	none	FTTUB: ETF	FTW-CL Podkrepa: ETF	FTTUB: ETF	FTW-CL Podkrepa: ETF
CY	none	none	none	none	CYATCoU: ATCEUC	none ⁵⁵	OIYK-SEK	PASEY-PEO
CZ	CZALPA: ECA	OOPL	OOPL	none	CZATCoA: ETF	none	OSD: ETF	OSZL
DE	VC: ECA	ver.di: ETF	UFO: EurECCA	ver.di: ETF	GdF: ATCEUC	ver.di: ETF ⁵⁶	ver.di: ETF	dbb
DK	DALPA: ECA	FPU: ETF, ECA	CUD: ETF	none	DATCoA: ATCEUC	none	HK Privat: ETF	3F: ETF
EE	ETTA: ETF	none	ETTA: ETF	none	EstACTA	ETTA: ETF	ETTA: ETF	none
EL	none	none	RACU: EurECCA	none	EEEKE: ATCEUC	HACU: ATCEUC	OSYPA: ETF	OPAM

⁵⁴ ATCEUC reported that BGATC is considered to be not a trade union but a professional association without official bargaining power. The collective bargaining is done by ACV on behalf of BGATC. However, BGATC works as the main actor to represent and (also indirectly) negotiate for the ATC, ATSEP and other ATM employees. ATCEUC also states that the ATCOs organised by trade unions that are part of ACV are affiliated to ATCEUC and not to ETF.

⁵⁵ ATCEUC indicated that PASYDY is a trade union organising mainly civil servants, and a small number of ATCOs. It could be regarded as the second-largest trade union in this subsector, but, due to its very small number of affiliated ATCOs, it is left out here. Almost all ATCOs and some other ATM employees are organised by CYATCO, which is affiliated to ATCEUC, which has a de facto monopoly in Cyprus.

⁵⁶ ATCEUC indicated that ver.di is as second-largest trade union for ATM staff, only organising about 1% of ATM employees. In theory it could claim involvement in collective bargaining for ATM employees, but in practice this does not happen. The point that ATCEUC wants to make is that, in Germany, it has a quasi-monopoly on representing ATC, ATSEP and ATM employees. This is a comment provided by ATCEUC that was not cross-checked in the framework of this study.

Member State	Largest trade unions organising pilots and their affiliations to ETF and ECA		Largest trade unions organising cabin crew and their affiliations to ETF and EurECCA		Largest trade unions organising ATCOs and their affiliations to ETF and ATCEUC		Largest trade unions organising ground handling staff and their affiliations to ETF	
	Largest	Second largest	Largest	Second largest	Largest	Second largest	Largest	Second largest
ES	SEPLA: ECA	UPPA	FSC-CCOO: ETF	SITCPLA: ETF	USCA: ATCEUC ⁵⁷	FSC-CCOO: ETF	FSC-CCOO: ETF	FS-USO: ETF
FI	FPA: ECA	YTY: ECA	AKT/SLSY: ETF	Pro: ETF	SLJY: ETF, ATCEUC	none	IAU: ETF	JHL: ETF
FR	SNPL: ECA	ALTER or SPAF ⁵⁸	FEETS-FO/SNPNC: ETF, EurECCA	FGTE-CFDT: ETF	SNCTA: ATCEUC	USAC-CGT: (ETF)	CGT Transports: ETF	CFDT: ETF
HR	HSPP	none	SKOZ: ETF	none	CATCoU: ATCEUC	SDHKZP	SHSZUZ	SRAZ
HU	HUNALPA: ECA	none	none	none	Control: ETF	LESZ: ETF	RMFSZ: ETF	LESZ: ETF
IE	IALPA: ECA	none	Forsa: ETF	SIPTU: ETF	Forsa: ETF, ATCEUC	none	SIPTU: ETF	Forsa: ETF
IT	ANPAC: ECA,	FILT-CGIL: ETF	ANPAC: EurECCA	FILT-CGIL: ETF	UNICA: ATCEUC	UGL Trasporto Aereo	FILT-CGIL: ETF	FIT-CISL: ETF
LT	none	none	none	none	LATCoA: ATCEUC	none	LPSDPS	none
LU	LCGB-ALPL: ETF, ECA	SAC-OGBL: ETF	SAC-OGBL: ETF	LCGB: ETF	LGATCo: ATCEUC	none	LCGB: ETF	SAC-OGBL: ETF
LV	LAA: ECA	LAAF	LAA	LAAF	LADA	LAAF	LAAF	LAA
MT	ALPA: ECA	none	UCC: ETF	None	MATCoA: ATCEUC	none	GWU: ETF	none
NL	VNV: ECA	none	VNC: EurECCA	FNV Cabine: ETF	VNLG: ATCEUC	none	FNV Luchtvaart: ETF	none
PL	ZZPK	none	ZZPiL	none	ZZKRL: ATCEUC	ZZKLW (contested: according to ATCEUC the second largest is its member organisation OZZSRL)	KSPTLIOL: ETF	ZZNPL
PT	SPAC	APPLA: ECA	SNPVAC: EurECCA	none	SINCTA: ATCEUC	SITECSA	SITAVA: ETF	SITEMA

⁵⁷ In Spain, USCA has a total affiliation (all employees, not only ATCOs) of 41.15% within ENAIRE, the major ANSP in Spain. CCOO is second with 19.72%. (ENAIRE has 4,011 employees in total, USCA almost 1,800 ATCOs). In the other two providers (SAERCO and FerroNATS, which are much smaller since they are terminal air navigation services for a few medium-size airports), USCA still represents more ATCOs than CCOO. USCA is therefore the largest trade union representing ATCOs in Spain.

⁵⁸ Not clear which one is the second-largest.

Member State	Largest trade unions organising pilots and their affiliations to ETF and ECA		Largest trade unions organising cabin crew and their affiliations to ETF and EurECCA		Largest trade unions organising ATCOs and their affiliations to ETF and ATCEUC		Largest trade unions organising ground handling staff and their affiliations to ETF	
	Largest	Second largest	Largest	Second largest	Largest	Second largest	Largest	Second largest
RO	FNSA	none	FNSA	none	ATSR: ATCEUC	none	FSA	SNTT: ETF
SE	SPF: ECA	none	Unionen: ETF	none	ST: ETF	none	Unionen: ETF	STF: ETF
SI	none	none	none	none	SSKL: ATCEUC	none	SAL	SSAL
SK	none	none	none	none	MOZRLP SR	none	OZ	none
Total EU27	14 ECA; 4 ETF	4 ECA; 5 ETF	12 ETF; 6 EurECCA	9 ETF	19 ATCEUC; 8 ETF	1 ATCEUC; 8 ETF	20 ETF	12 ETF

Notes: Affiliation in parentheses means indirect membership via a higher- or lower-order unit. ATCEUC indicated that in Poland only its member unions organising ATCOs, ATSEP and ATM staff. According to ATCEUC, the ETF affiliated trade unions from Poland do not organise ATCOs, ATSEP or other ATM employees. In addition, adding to the representativeness of ATCEUC are the ATCOs that are part of TUEM and the ATCOs working for the Maastricht Upper Area Control Centre. These are 87 ATCOs in the Brussels sector group (Belgium), 85 in the Deco sector group (Netherlands), 91 in the Hannover sector group (Germany) and 24 in the German military.

Source: Network of Eurofound Correspondents, 2020

7. Representativeness of the European employer organisations

In this chapter the collective representativeness of all seven European employer organisations will be presented. An assessment will be made of their membership strength, the status of their national members and their capacity to negotiate. In addition, the limits of the representativeness of social partners involved in the ESSDC for the civil aviation sector are assessed through comparison with the representativeness of other European associations and by measuring the representativeness of all the national organisations that are not represented by the organisations involved in the ESSDC.

Table 75: European employer organisations in the civil aviation sector

Subsector	European employer organisation	Represented companies
Airlines	ENAA (formerly ACP)	Network carriers
	A4D	LCCs and network carriers
	ERA	Regional airlines and cargo airlines
	AIRE	Leisure airlines
Ground services	ACI Europe	Airports
	ASA	Specialised ground service providers
ATM	CANSO	Air traffic control

Source: Network of Eurofound Correspondents, 2020

7.1. European Network Airlines' Association

In the second quarter of 2022, the Airline Coordination Platform (ACP) changed its name to the European Network Airlines Association (ENAA). The statutes, the membership structure and all other characteristics of the organisation were reported as staying the same.

ENAA is the European employer organisation representing mainly network carrier airlines. It also has, however, regional airlines (such as HOP!, KLM Cityhopper and Lufthansa CityLine) and LCCs (Transavia and Eurowings) in its membership, where the regional airlines are part of network carrier groups. ENAA is an association of companies. It does not have a website or its own office. According to ENAA, its secretariat is supplied by 'a dedicated support team provided by DR2 consultants, and the Director of the Social Affairs Workgroup, as well as a Director of the Competitiveness Workgroup'.

7.1.1. Membership representation and composition of ENAA (ACP)

ENAA represents a number of European airline companies, all of which belong to three groups: Air France–KLM, Lufthansa and SAS. The largest airline company in each of 9 Member States is represented by ENAA, and eight of them are among the 13 Member States with the largest sectoral workforce (see Table 5 in Chapter 1). Based on information provided by the airlines, ENAA affiliates represent 45% pilots employed in the EU and 41% of the cabin crew.

Table 76: Membership domain and membership strength of ENAA in EU27, 2019

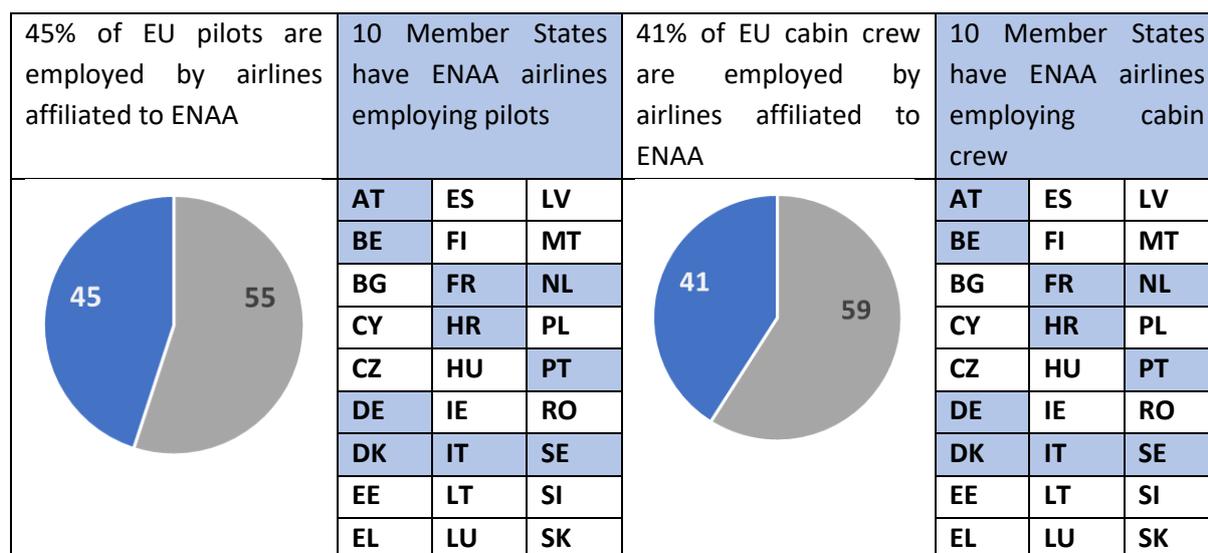
Member State	Airline	Aircrew employees in absolute numbers and %				Number of ground services employees
		Number of pilots employed	% of all pilots in the country	Number of cabin crew employed	% of all cabin crew in country	
AT	Austrian Airlines	1,185	79	2,583	78	n.a.
AT	Eurowings	100	7	180	5	n.a.
BE	Brussels Airlines	701	n.a.	1,856	n.a.	n.a.
DE	Lufthansa	4,920	41	21,053	n.a.	2,950
DE	Eurowings	1,065	9	1,751	n.a.	n.a.
DK	SAS	~ 600	n.a.	~ 1,200	n.a.	~ 1,000
FR	Air France	3,804	42	11,843	63	29,202
FR	HOP!	850	8	785	5	n.a.
HR	Croatia Airlines	130	90	250	95	80
IT	Air Dolomiti	192	n.a.	311	n.a.	200
NL	KLM	2,500	46	9,500	80	13,500
NL	Transavia	650	12	1,300	11	500
PT	TAP	855	n.a.	3,408	n.a.	2,626
SE	SAS	560	n.a.	~ 1,200	n.a.	~ 1,000
EU27	14 airline companies in 10 Member States	~ 18,000	45% of 40,000	~ 57,000	41% of 140,000	In 8 Member States: DE, DK, FR, IT, HR, NL, PT, SE

Notes: Green cells contain the name of the largest airline in the country. Red cells indicate only a rough estimate was available.

Source: Network of Eurofound Correspondents, 2020

Among ENAA's member companies, two have established European works councils, in which their employees from other Member States are informed and consulted. This is the case for Air France–KLM and for the Lufthansa Group, and it proves that, with their affiliation to ENAA, the central managements of these two multinationals also take seriously their role as employers in all EU Member States where they have employees. The Air France–KLM European works council, for example, has employee representatives from Germany, Italy and Spain, representing between 250 and 500 employees in each country.

Figure 24: ENAA representing employers of pilots and cabin crew, 2019

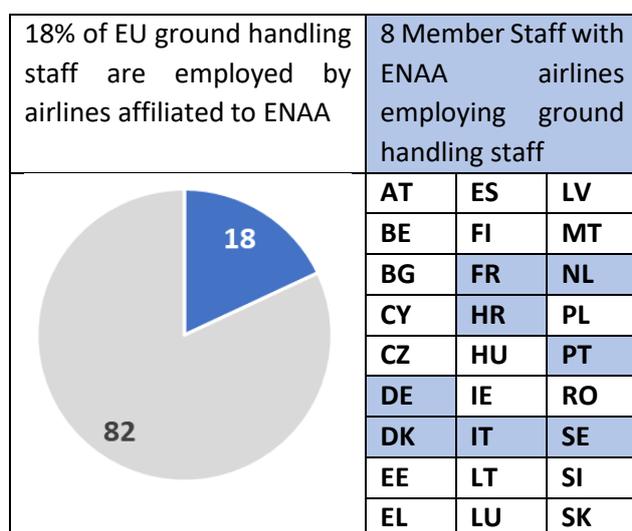


Source: Table 76

Based on available information, the ENAA member companies also employ ground handling services workers in at least five or six Member States. But this could well be 12–15 Member States, if all information could be gathered on the employees of the Lufthansa Group and Air France–KLM in all Member States. However, this could not be checked. Thus, ENAA represents the interests of affiliated companies as employers of pilots, cabin crew and ground handling staff.

Most of the affiliated airline companies are only represented in the ESSDC by ENAA. The exceptions are the Lufthansa Group and Croatian Airlines, which are both also affiliated to ERA.

Figure 25: ENAA representing employers of ground handling staff, 2019



Source: Table 76

Table 77: ENAA member companies and the numbers of their aircraft, seats and MTOW, 2019

Member State	Airline	Aircraft registered in 2019	Aircraft in this Member State in 2019	% of all aircraft in Member State	% of total seats in Member State	% of total MTOW in Member State
AT	Austrian Airlines	82	390	21	27	29
AT	Eurowings	21		5	7	6
BE	Brussels Airlines	56	148	38	67	47
DE	Lufthansa	296	823	36	59	55
DE	Eurowings	103		13	13	7
DE	Lufthansa CityLine	54		7	5	3
DE	Lufthansa Cargo	15		2	0	5
DK	SAS	n.a.	117	n.a.	n.a.	n.a.
FR	Air France	225	435	52	73	78
FR	Transavia France	36		8	9	5
FR	HOP!	71		16	8	4
HR	Croatia Airlines	12	14	86	83	83
IT	Air Dolomiti	14	244	6	5	3
NL	KLM	119	234	51	70	74
NL	KLM Cityhopper	49		21	11	7
NL	Transavia	33		14	14	8
PT	TAP	84	202	42	69	64
SE	SAS	152	255	60	72	72
EU27	14 companies in 10 Member States	1,422	5,073 (EU-27)MS	28% of EU27	39% of EU27	41% of EU27

Note: The companies marked in green are the network carrier airlines (see section 5.2.1) represented by ENAA.

Source: Cirium database and authors' own calculations

Figures in Table 77 come from a database with exact numbers of registered aircraft for each airline company and for each Member State where they are registered, the number of passenger seats in these aircraft and their MTOW. The number of passenger seats represents the relative capacity of the given airline in passenger transport, and the MTOW provides an indication of its capacity in freight air transport. Lufthansa Cargo, for example, has 15 registered aircraft in Germany and no passenger seats, but with its 4,722,618 kg MTOW accounts for 5% of the MTOW of all aircraft registered in Germany.

ENAA-affiliated airline companies operated 1,422 aircraft in 2019, 28% of all 5,073 registered aircraft in the EU27. The 10 Member States where ENAA affiliates are based alone have 2,862 registered aircraft, of which 1,422, or 50%, are operated by the ENAA-affiliated airlines. The total number of seats in aircraft operated by ENAA-affiliated airlines was 271,404 in 2019. This is 39% of the total of 699,447 passenger seats in registered aircraft in the EU27 in 2019. The total MTOW of aircraft operated by ENAA-affiliated airlines was 186,027,291 kg in 2019. This is 41% of the total MTOW of 456,619,537 kg of all registered aircraft in the EU27 in 2019.

Considering the typology of air transport companies, developed in Chapter 3, the ENAA membership represents five types of companies. ENAA has the strongest representativeness among the largest

network carriers, listed in Chapter 5. ENAA's members include the largest main airlines, operating 69% of all aircraft. The LCCs Eurowings and Transavia are ENAA members, accounting for 17% of the aircraft in this category. ENAA-affiliated regional airlines, meanwhile, represent 39% of the aircraft in this category. Croatian Airlines is a smaller main airline, and Lufthansa Cargo and SAS Cargo illustrate the representativeness of ENAA in these categories.

Table 78: Types of air transport companies represented by ENAA, 2019

Type of air transport company	Affiliates of ENAA in this category	Number of aircraft of ENAA affiliates	% of all aircraft in this category	Average number of passenger seats per aircraft
Largest main airline	Austrian Airlines, Brussels Airlines, Lufthansa, Air France, KLM, TAP, SAS	1,014	69	217
Smaller main airline	Croatian Airlines	12	20	115
LCC	Eurowings, Transavia	193	17	165
Regional	Lufthansa CityLine, HOP!, KLM Cityhopper, Air Dolomiti	188	39	95
Cargo	Lufthansa Cargo, SAS Cargo (no info on SAS cargo)	15	7	0

Source: Chapter 3 of this report

7.1.2. ENAA members in the social partner structures of their countries

The second representativeness criterion in Decision 500 of 1998 requires that European social partner organisations be an integral and recognised part of Member States' social partner structures (see section 0.1 in the introduction). All 14 airlines affiliated to ENAA are involved in single-employer collective bargaining in 10 Member States. In all cases, this includes collective bargaining on behalf of pilots; for cabin crew, this is the case in nine Member States (excluding Sweden, where collective bargaining is done at sector level). ENAA also represents seven companies in six Member States that are involved in collective bargaining at company level on behalf of ground handling staff. This is the case in Denmark, France, Croatia, Italy, the Netherlands and Portugal (Table 79).

In Austria, Denmark, France, the Netherlands and Portugal, ENAA-affiliated airlines are also consulted by their national governments on sector-related matters. This happens in Austria, Denmark, France (only for ground handling) and the Netherlands.

Table 79: Involvement of ENAA in company-level collective bargaining

Member State	Company	On behalf of pilots (%)	On behalf of cabin crew (%)	On behalf of ground handling staff (%)	SEB/MEB	Employer organisation co-signing collective bargaining agreements	Consulted as company	Bipartite social dialogue	Tripartite social dialogue
AT	Austrian Airlines	75	75		SEB	WKÖ-FVALS			
AT	Eurowings	n.a.	n.a.		SEB	WKÖ-FVALS			
BE	Brussels Airlines	n.a.	100		SEB				
DE	Lufthansa	100	100	90	SEB		n.a.	n.a.	n.a.
DE	Eurowings	85	85		SEB				
DK	SAS	50	50		SEB	DI			
DK	SGH			75	SEB	DI (assisting)			
FR	Air France	50	60	30	SEB			For ground handling	
HR	Croatian Airlines	97	97	100	SEB				
IT	Air Dolomiti	2	2	2	SEB				
NL	KLM	100		100	SEB				
NL	Transavia	100	100	100	SEB				
PT	TAP	61	87	26	SEB		50%		
SE	SAS	n.a.			SEB	Transport-företagen	n.a.	n.a.	n.a.

Note: MEB, multi-employer bargaining; n.a., no data available; SEB, single-employer bargaining. The purple cells indicate the percentage of the company workforce covered by these single-employer bargaining agreements, subject to data availability. The grey cells indicate companies that are consulted on sector-related matters by the government or those that are involved in bipartite or tripartite sectoral social dialogue in their countries.

Source: Network of Eurofound Correspondents, 2020

Except for Air Dolomiti, all companies affiliated to ENAA are also affiliated to national sectoral employer organisations. Through this affiliation, the companies are indirectly involved in multi-employer collective bargaining in nine Member States. Table 80 indicates the affiliations to national sectoral employer organisations. HUP in Croatia is a cross-industry employer organisation with a transport association in which air transport actors are involved, among employers from other transport sectors.

Table 80: ENAA member companies' affiliations to national sectoral employer organisations

Member State	Company	National organisation
AT	Austrian Airlines	WKÖ-FVALS
	Eurowings	WKÖ-FVALS
BE	Brussels Airlines	BAR, BATA
DE	Lufthansa	AGVL for aircrew staff

		BdL for GH staff
DK	SAS	DI
FR	Air France	FNAM
HR	Croatian Airlines	HUP (cross-industry employer organisation) transport association
IT	Air Dolomiti	
NL	KLM	VNO NCW
PT	TAP	APTTA, RENA
SE	SAS	Transportföretagen

Source: Network of Eurofound Correspondents, 2020

Table 81: National sectoral employer organisations to which ENAA companies are affiliated

Member State	Employer organisation	Collective bargaining involvement				Consulted	Social dialogue body		Type of organisation	Representativeness of organisation*	Affiliation to national cross-industry EO
		Pilots NACE 51.10	Pilots NACE 51.21	Cabin crew	Ground handling		Bipartite	Tripartite			
AT	WKÖ-FVALS	yes	yes	yes	yes	yes	no	yes	EO	yes	WKÖ
BE	BAR	yes	yes	yes	no	yes	yes	no	EO	yes	none
BE	BATA	yes	yes	yes	no	yes	yes	no	EO	yes	FEB-VBO
DE	AGVL	yes	yes	yes	no	yes	n.a.	n.a.	EO	yes	BDA
DE	BdL								EO	yes	none
DK	DI	yes	yes	yes	yes	yes	no	no	EO	yes	DA
FR	FNAM	(yes)	(yes)	(yes)	yes	yes	yes	no	EO	yes	MEDEF
HR	HUP (transport association)					yes			BA		HUP
SE	Transportföretagen	yes	yes	yes	no	yes	yes	no	EO	yes	SN

Italy is the only country where there is a sectoral EO (Assaereo) that does not represent the ENAA-affiliated airline (Air Dolomiti).

IT	Assaereo	yes	yes	yes	yes	n.a.	no	no	EO	yes	Confindustria
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Note: BA, business association; EO, employer organisation. The dark green cells indicate that this employers organisation has affiliated companies that operate as employer for this part of the sector; the light green cells indicate their involvement in consultations and in social dialogue. The yellow cells mark the employers organisations; the blue cells indicate organisations that are recognised as representative for the sector in the country.

Source: Network of Eurofound Correspondents, 2020

7.1.3. ENAA's autonomy and capacity to negotiate

The third criterion to assess representativeness, according to Commission Decision 500 of 1998, is that European social partner organisations have adequate structures to ensure effective participation in the ESSDC. For this, the internal functioning and the delegating and decision-making procedures

within ENAA will be assessed here. An important part of the recognition and role of ENAA lies in its history. ENAA was established in 2017, but its members were already involved in the ESSDC before that.

ENAA can to some extent be seen as the successor of the Association of European Airlines (AEA), which was included in the 2010 aviation sector representativeness study. AEA was dissolved in 2016 because of the establishment of Airlines for Europe (A4E), which took in members of both AEA and the European Low Fares Airlines Association (ELFAA), which was also dissolved (in 2017). ENAA was created in 2017 because airlines united in A4E found they could agree on most sector-related topics, but not on issues related to competitiveness and social dialogue. Therefore, two separate European employer organisations were created in 2017: ENAA and Airlines for Dialogue (A4D). They coexist with A4E, the European trade association representing all ENAA and A4D airlines on issues such as airport charges, consumer rights and environmental matters.

Comparing the current membership of ENAA with the airlines that were part of the former AEA shows that ENAA's membership domain is somewhat smaller. Moreover, Aegean, Air Baltic, Air Malta, CargoLux, Luxair, DHL Aviation, Finnair, LOT and TAROM were members of AEA, although they are not represented in ENAA currently. Finnair is affiliated to A4D. There are also network carriers, such as Czech Airlines, Bulgaria Air and the former Alitalia, that are not represented by ENAA. With Lufthansa Cargo, ENAA has some representation among the cargo air transport companies, although somewhat less than the former AEA. And, where in the past there was a clearer divide between AEA representing the network carriers and ELFAA representing the LCCs, this is less clear when it comes to ENAA and A4D. ENAA also represents the low-cost operators Transavia (part of the Air France–KLM group) and Eurowings (part of the Lufthansa Group). Table 76 illustrates that some regional airlines are also represented by ENAA.

ENAA participated in the ESSDC for the aviation sector as of 2019, two years after it was founded. Article 3 in ENAA's articles of association indicates that its official seat is in Nijmegen, the Netherlands. The organisation does not, however, have a secretariat, website or permanent staff. The administration of ENAA is outsourced, with four people engaged in its activities: the director of social affairs, the director of external affairs and two administrators. ENAA membership fees provide 100% of ENAA's resources.

The ENAA statutes provide for a general assembly and an executive board. Article 16 stipulates that most decisions are taken by unanimous consent. The involvement of ENAA in the ESSDC is rooted in its objectives, included in Article 4 of its statutes. One of these objectives is to 'create a common platform for air carriers based in the EU, advocating on social issues and participating in the European Social Dialogue'. In Article 6, ENAA requires its members to engage in consultations, social dialogue and collective bargaining with trade unions, in accordance with ILO conventions 98 and 87.

Regarding internal decision-making procedures, the possibility of providing rules and procedures is stipulated in Article 20 of the statutes, but so far this has not been used. According to Article 5, ENAA has no authority to undertake obligations or liabilities in the name of its members, unless so instructed by an explicit authorisation. The procedure by which ENAA obtains a mandate to discuss or negotiate a text in the ESSDC comes from the ENAA social affairs working group, which meets eight times a year, reporting from the social affairs director to the executive committee on at least four occasions per year, and from email exchanges between the social affairs director and the contacts in the affiliated airline companies. There is a fixed list of people to be consulted, and, if an issue arises between the

fixed eight meetings of the social affairs working group, another ad hoc meeting can be called spontaneously. The ENAA members are kept informed about the activities in the ESSDC, but there is no need to agree on an ESSDC joint opinion; this is done only within the social affairs working group of ENAA. Once the working group has reached a consensus, the social affairs director can sign ESSDC joint opinions or approved texts.

In terms of general policy positions, ENAA advocates fair and balanced international air transport agreements and fair working conditions for all aviation employees in order to establish a level playing field for all European airlines. ENAA calls for the prohibition of pay-to-fly schemes, zero-hours contracts and bogus self-employment and wants to establish minimum social standards, including for non-EU carriers operating inside the EU. As a promoter of social dialogue in the sector at both European and national levels, ENAA insists that its member carriers be involved in collective bargaining or social dialogue at national level.

7.2. Airlines for Dialogue

A4D represents mainly LCCs, although it also counts the network carrier IAG among its members. It is an association of companies without a secretariat or a website. Some of the member companies have delegated a person who, for part of his or her working time, takes up tasks for A4D. Collecting information from A4D members has proven to be extremely difficult, and the information obtained was given on the condition that it not be published in this study. This may indicate that A4D is only an advocacy vehicle of the affiliated airlines and not a proper European employer organisation, representing the companies as sectoral employers. A4D reported that it represents the member companies at EU level and that it can participate in the ESSDC on behalf of all its member companies.

7.2.1. A4D's membership domain and composition

A4D represents a number of European airline companies belonging to four groups plus Finnair. The four airline groups represented by A4D are: Ryanair Group (with Ryanair, Ryanair DAC, Buzz, Lauda Air and Malta Air), EasyJet Group, IAG (with Iberia, British Airways, Vueling, Aer Lingus and IAG Cargo) and Norwegian Group. For affiliated airlines based in the UK and Norway, only their employment and activities in the EU27 are included in this report.

In three Member States, the largest airline company is represented by A4D. This is the case for Iberia in Spain, Finnair in Finland and Aer Lingus in Ireland (see Table 5 in Chapter 1). Based on information from the airline companies, the airlines affiliated to A4D represent about 20% of pilots employed in the EU and 13–15% of the cabin crew (Table 82).

Table 82: A4D membership domain and density in EU27, 2019

Member State	Airline	Aircrew employees in absolute numbers and %				Number of ground services employees
		Number of pilots employed	% of all pilots in Member State	Number of cabin crew employed	% of all cabin crew in Member State	
ES	Iberia	1,317	26	3,309	33	2,680
ES	Vueling	737	14	2,129	21	
ES	EasyJet	109	2	242	2	
ES	Norwegian	238	5	600	6	
ES	Ryanair	n.a.		n.a.		
FI	Finnair	1,000	62	2,000	60	300 ticket desk, 800 technicians

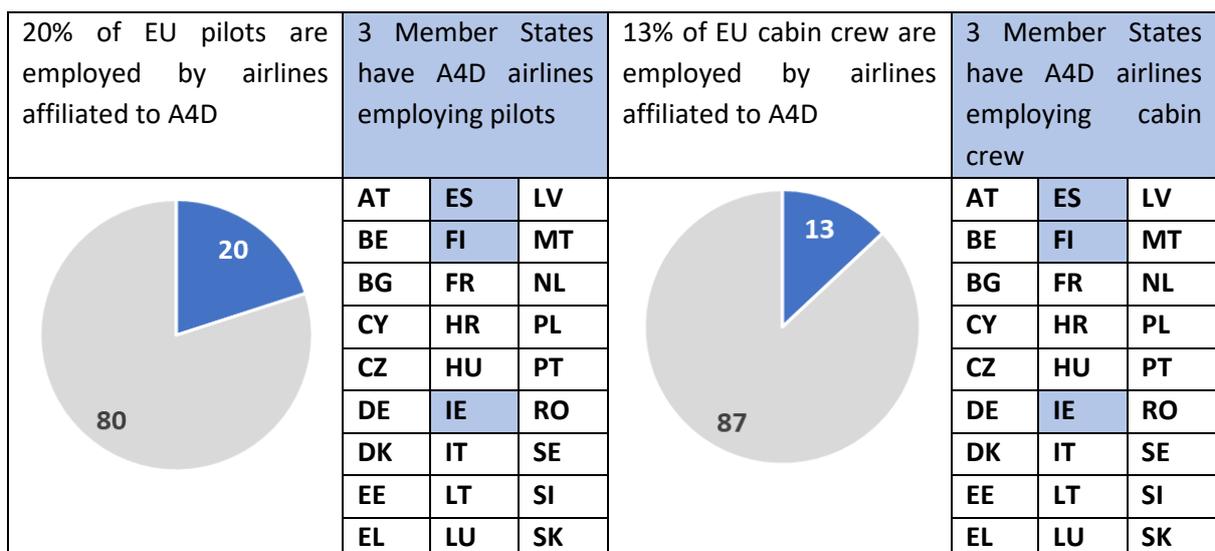
IE	Ryanair	481 (317 employees, 164 temporary agency workers)	32	845 (247 employees, 598 temporary agency workers)	35	323 (186 employees including management, 137 temporary agency workers)
IE	Aer Lingus	731 (697 full-time employees, 28 secondees, 6 temporary agency workers)	49	1,773	74	1,659 (350 baggage, 384 ticket desk, 335 technicians, 272 catering/pushbacks, 185 cleaning, 133 cargo)
EU27 (excluding Ireland)	Ryanair	3,546 (2,557 employees and 989 temporary agency workers)		6,702 (3,022 employees and 3,680 temporary agency workers)		0
TOTAL	7 airline companies in 3 Member States	8,159	20% of 40,000	17,600	13% of 140,000	In 3 Member States

Notes: Green cells indicate the largest airline in the country. EasyJet, Norwegian and British Airways are also members of A4D and can add to its representativeness for their operations in the EU27, but none of them provided information for this study.

Source: Network of Eurofound Correspondents, 2020

Three of A4D's member companies have established European works councils, in which their employees from other Member States are informed and consulted. This is the case for Aer Lingus, Ryanair and IAG, which supports the reasoning that, with their affiliation to A4D, the central managements of these three multinationals also take seriously their role as employers (for the purposes of informing and consulting their employees) in all Member States where they have employees. This is independent of the number of countries in which the airline companies affiliated to A4D engage in collective bargaining, about which the A4D member companies could not provide information.

Figure 26: A4D representation of employers of pilots and cabin crew, 2019

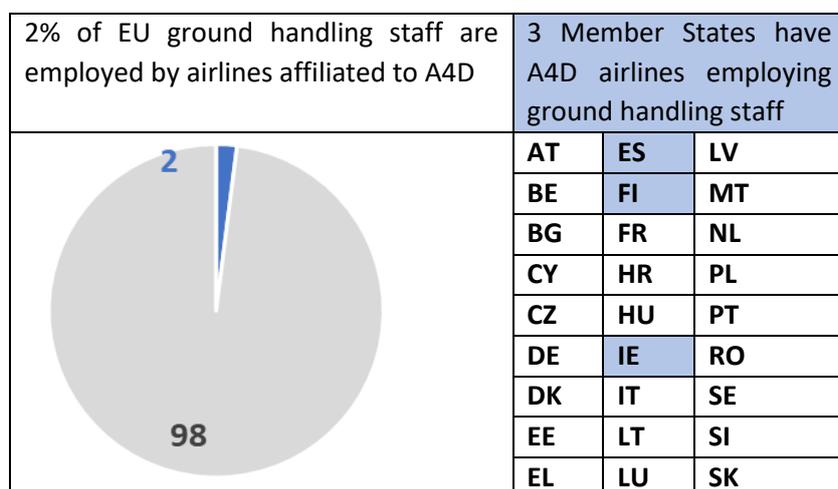


Source: Table 82

Based on available information, the A4D member companies also operate as employers of ground handling service staff in at least three Member States. However, this could well be 12–15 Member States, if all information could be gathered on the employees of Ryanair, IAG, EasyJet and Norwegian in all Member States. Thus, A4D represents the interests of the affiliated companies as employers of pilots, cabin crew and ground handling employees.

All affiliated airline companies are only represented in the ESSDC by A4D.

Figure 27: A4D representing employers of ground handling staff, 2019



Note: Data on ground handling staff in other Member States is missing.

Source: Table 82

Table 83: A4D members' numbers of aircraft, seats and MTOW, 2019

Member State	Airline	Aircraft registered in 2019	Aircraft in this Member State in 2019	% of all aircraft in Member State	% of total seats in Member State	% of total MTOW per Member State
AT	EasyJet	23	390	6	51	41
AT	Lauda	138		35	9	7
AT	LaudaMotion	14		4	0.3	2
ES	Iberia and Iberia Express	108	511	21	30	35
ES	Vueling	121		24	27	19
ES	Iberia	85		17	25	n.a.
ES	Iberia express	23		4	5	n.a.
FI	Finnair	61	91	67	86	89
IE	Ryanair	365	552	66	75	65
IE	Aer Lingus	58		11	13	17
IE	Norwegian Ireland	43		8	9	9
MT	Malta Air	48	252	19	52	27
PL	BUZZ	32	202	18	27	18

SE	Norwegian Sweden	29	255	11	17	18
EU27	14 companies in 10 Member States	1148	5,073 (EU27)	23%	31% of EU27	23% of EU27

Notes: Blue cells indicate the low-cost airlines (see section 5.2.2) represented by A4D. Iberia, Finnair, Aer Lingus and Malta Air are network carriers. Buzz is a leisure airline, operating flights to specific holiday destination.

Source: Cirium database and authors' own calculations

Figures in Table 83 come from a database with exact numbers of registered aircraft for each airline company and for each Member State where they are registered, the number of passenger seats in these aircraft and their MTOW. The number of passenger seats represents the relative capacity of the given airline in passenger transport, and the MTOW provides an indication of its capacity in freight air transport. Iberia (not including Iberia Express), for example, with its 85 registered aircraft and average of 245 seats per plane, accounts for 25% of the passenger seats and 32% of the total MTOW in Spain. In the same country, Vueling has 121 registered aircraft and an average of 185 seats per plane, accounting for 27% of the passenger seats and 19% of the MTOW. The larger proportion of MTOW than of passenger seats indicates that Iberia is more involved in freight transport than Vueling, where the proportion of MTOW is significantly lower than that of passenger seats.

The A4D-affiliated airline companies had 808 aircraft in 2019, 16% of all 5,073 registered aircraft in the EU27. Taking the five home countries of the A4D-affiliated airlines alone, we count 1,799 registered aircraft, of which 808, or 45%, are represented by the A4D airlines. The total number of seats was 211,224 in 2019. This is 30% of the total 699,447 passenger seats in all registered aircraft in the EU27 in 2019. The total MTOW of all aircraft of A4D airlines was 98,948,357 kg in 2019. This is 22% of the total MTOW of 456,619,537 kg of all registered aircraft in the EU27 in 2019.

Within A4D, Ryanair is a multinational company that operates as an employer of pilots and cabin crew in 22 EU Member States (Table 84). Only in Estonia, Finland, Luxembourg, the Netherlands and Slovenia does it not. In Finland, there is Finnair, which employs about 1,100 pilots and about 2,000 cabin crew.

Table 84: A4D member companies as employer in 22 EU Member States

Country	Ryanair		Finnair	IAG		
	Cabin crew	Pilots	Pilots and cabin crew	Pilots	Cabin crew	Ground handling staff
AT	279	11				
BE	412	184				
BG	53	29				
CY	73	34				
CZ	56	36				
DE	637	401				
DK	44	16				
ES	1,625	854		Iberia 1406	Iberia 3591	Iberia 8118
FI			1,100 pilots 2,000 cabin crew			

FR	216	91				
EL	113	54				
HR	58	0				
HU	172	83				
IE	795	483		Aer Lingus 724	Aer Lingus 1803	Aer Lingus 1268
IT	1,864	961				
LT	94	39				
LV	54	21				
MT	116	64				
PL	612	340				
PT	433	249				
RO	54	27				
SE	66	28				
SK	28	21				
Total	7,854	4,026				

Source: Ryanair, Finnair, IAG

In response to the fieldwork research, Ryanair wished to demonstrate that, although some airlines have their aircraft operator's certificate in one particular Member State, the pilots and cabin crew working with it can be based in other Member States. Buzz, for example, has aircrew based in seven countries (Bulgaria, Czechia, Hungary, Latvia, Lithuania, Poland and Slovakia), Lauda Air in three (Austria, Croatia and Spain), Malta Air in eight (Austria, Denmark, France, Germany, Italy, Malta, Romania and Sweden) and Ryanair DAC in seven (Belgium, Cyprus, Greece, Ireland, Portugal, Spain and Sweden).

Considering the typology of air transport companies developed in Chapter 5, A4D membership represents two types of companies according to the data collected for this study, or three types based on A4D's self-assessment. The strongest representativeness A4D has is among the LCCs in the EU27. The companies affiliated to A4D represent 60% of all aircraft in the fleet of LCCs. With Aer Lingus, Iberia and Finnair, the A4D member companies have representation among the largest main airlines, amounting to 13% of the aircraft in this category. Finally, with IAG Cargo, A4D can claim representation among cargo air traffic companies.

Table 85: A4D representation in types of air transport companies, 2019

Type of air transport company	Affiliates of A4D in this category	Number of aircraft of A4D affiliates	% of all aircraft in this category	Average number of passenger seats per aircraft
Largest main airline	Aer Lingus, Iberia, Finnair	204	13	227
LCC	EasyJet, IberiaExpress, Vueling, Norwegian, Ryanair	696	60	186
Cargo	Cargo activities of airlines of the IAG group			

Source: Chapter 5 of this report

7.2.2. A4D members in the social partner structures of their countries

The second representativeness criterion in Commission Decision 500 of 1998 stipulates that European social partner organisations be an integral and recognised part of Member States' social partner structures (see section 0.1 in the introduction). Only six airlines affiliated to A4D are involved in single-employer bargaining in three Member States. A4D members are involved in collective bargaining on behalf of pilots, cabin crew and ground handling staff in Spain and Ireland. In Finland, Finnair carries out collective bargaining only for pilots (Table 86).

Table 86: A4D-affiliated companies' involvement in company-level collective bargaining

Member State		For pilots (%)	For cabin crew (%)	For ground handling staff (%)	SEB/MEB	Is an employer organisation co-signing collective bargaining agreements	Consulted as company	Bipartite social dialogue	Tripartite social dialogue
AT	LaudaMotion				SEB				
ES	Iberia	96	64		SEB				
	Iberia Airport Services				SEB				
	Vueling				SEB				
FI	Finnair	65		0	SEB + MEB				
IE	Ryanair	20	30	0	SEB				
	Aer Lingus	50	60	25	SEB				
	Norwegian IE								
SE	Norwegian								

Notes: MEB, multi-employer bargaining; SEB, single-employer bargaining. Purple cells indicate companies involved in single-employer collective bargaining.

Source: Network of Eurofound Correspondents, 2020

None of the A4D airlines report that they are consulted by their national governments on sector-related matters or involved in sectoral social dialogue structures in their country. Direct involvement in the social dialogue structures is thus limited to company-level collective bargaining.

Ryanair alone reported being involved in social dialogue or collective bargaining negotiations in 12 EU Member States: Belgium, Denmark, France, Germany, Greece, Ireland, Italy, Malta, Portugal, Romania, Spain and Sweden. Table 87 lists the trade unions that are involved in these negotiations with Ryanair to determine working conditions for pilots and for cabin crew.

Table 87: Involvement of Ryanair as employer in collective bargaining negotiations with trade unions

Member State	Trade unions negotiating working conditions of pilots with Ryanair	Trade unions negotiating working conditions of cabin crew with Ryanair
Belgium	BeCA	CNE, ACV Puls
Denmark	FPU,	FPU,

France	SNPL	SNPNC
Germany	VC	ver.di
Greece	–	RACU
Ireland	Forsa	Forsa
Italy	ANPAC, FIT-CISL	ANPAC, ANPAV, FIT-CISL
Malta	UHM (verification process under way)	GWU
Portugal	SPAC	STTAMP
Romania	–	FPU Romania ⁵⁹
Spain	SEPLA	SITCPLA, FS-USO, FSC-CCOO
Sweden	SPF	Unionen

Source: Information provided by Ryanair (this information has not been cross-checked by national correspondents in the scope of this study)

A4D member companies from Austria, Finland, Ireland, Italy and Spain are also affiliated to national sectoral employer organisations. Through this affiliation, the companies are indirectly involved in multi-employer collective bargaining in three Member States. Table 88 indicates affiliation to national sectoral employer organisations.

Table 88: A4D members' affiliation to national sectoral employer organisations

Member State	A4D member company	Affiliated national sectoral employer organisation
AT	LaudaMotion	WKÖ-FVALS
DK	Norwegian DK	
ES	Ryanair	ALA
ES	Iberia	ALA
ES	Vueling	ALA
FI	Finnair	Palta
IE	Ryanair	NCADF
IE	Aer Lingus	
IE	Norwegian IE	
IT	Ryanair	AICALF
SE	Norwegian	

Source: Network of Eurofound Correspondents, 2020

Table 89 indicates the role of these sectoral employer organisations or business associations in the national industrial relations landscape. This illustrates again that only in Austria, Spain, Ireland and Finland are A4D-affiliated companies also indirectly involved in the industrial relations system of the country.

⁵⁹FPU Romania is the Flight Personnel Union Romania, it is not confirmed in the scope of this study whether this is a separate trade union in Romania, or a branch of the Danish trade union FPU. Therefore it was not included in the scope of this study.

Table 89: National sectoral employer organisations to which A4D companies are affiliated

Member State	Employer organisation	Collective bargaining involvement				Consulted	Social dialogue body		Type of organisation	Representativeness of organisation	National affiliation
		Pilots NACE 51.10	Pilots NACE 51.21	Cabin crew	Ground handling		Bipartite	Tripartite			
AT	WKÖ-FVALS	yes	yes	yes	yes	yes	no	yes	EO	yes	WKÖ
ES	ALA								BA		
FI	Palta	yes	yes	yes	yes	yes	yes	no	EO	yes	EK
IE	none										

Note: BA, business association; EO, employer organisation. The dark green cells indicate that the employers organisation has affiliated companies that operate as employer for this part of the sector; the light green cells indicate their involvement in consultations and in social dialogue. The yellow cells mark the employers organisations; the blue cells indicate the ones that are recognised as representative for the sector in the country.

Source: Network of Eurofound Correspondents, 2020

7.2.3. A4D’s autonomy and capacity to negotiate

Based on the information provided, it can be concluded that A4D has no capacity to negotiate on behalf of its member companies, which means it does not have the structure to participate effectively in the ESSDC – the third criterion of representativeness laid out in Commission Decision 500. A4D says it is able to participate in social dialogue meetings on behalf of all its member companies. However, it considers that negotiating joint texts or agreements that would affect working conditions would be anti-competitive and breach EU competition law.

A4D has, however, co-signed several joint statements with other European social partners in the civil aviation sector since 2020. No information was provided on how A4D handles such internal mandating and decision making supporting its capacity to negotiate and agree on such texts, on behalf of and with full commitment from its members.

All joint texts, indicating the associations that have signed them, are listed in Table 122, in section 8.2.

7.3. Airlines International Representation in Europe

AIRE represents a number of leisure airline companies. It has been contacted but has not provided feedback on the questions raised in the scope of this study. There are some doubts about the organisation's membership, with TUI and Novair confirmed by Eurofound correspondents to be affiliated to AIRE in 2019 and 2020 but no longer appearing on the AIRE website's list of members. The Italian member Neos did not confirm its membership of AIRE in the scope of this study (marked in red in Table 90).

7.3.1. AIRE membership domain and composition

Airlines International Representation in Europe (AIRE) used to promote the interests of 14 airline companies in 10 Member States up to 2019. In 2020, TUI Fly and Novair have ended their membership with AIRE. The membership of NEOS could not be confirmed, so for the purpose of this study, it is assumed that they are no longer affiliated. This brings the membership of AIRE back to 8 Airlines in 6 Member States, of which 5 are leisure airline companies from 3 Member States.

AIRE mainly represents leisure airlines, that transport tourists as part of a holiday package including flight, accommodation and other local tourist services. Also, members of AIRE, however, are the network carrier LOT and the low-cost airline Transavia (which is part of the Air France–KLM group, represented by ENAA).

Based on information provided by the airlines, AIRE-affiliated companies employ 6% of the pilots and 3% of the cabin crew in the EU27. Including the (unconfirmed) estimates (in yellow cells in Table 90), these percentages could be 8% and 5%, respectively, or even higher.

Table 90: AIRE membership domain and density in EU27, 2019

Member State	Airline	Aircrew employees				Number of ground services employees
		Number of pilots employed	% of all pilots in country	Number of cabin crew employed	% of all cabin crew in country	
BE	TUI fly Belgium	250		750		n.a.
DE	TUI fly	600		1,800		n.a.
DK	Sunclass Airlines	219	11	567	25	0
ES	Alba Star	n.a.		n.a.		n.a.
ES	Evelop Airlines	69		221		0
ES	Warmos Air	n.a.		n.a.		n.a.
IT	Neos (membership not confirmed)	170		432		120
NL	Transavia	650		1,300		500
NL	TUI Netherlands	n.a.		500		50
PL	LOT	820		1,579		Through subsidiary company
PT	EuroAtlantic	90		270		n.a.
SE	Novair	60		90		0
SE	TUI fly Nordic	150		n.a.		n.a.
SK	AirExplore	125		n.a.		n.a.

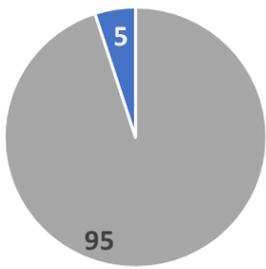
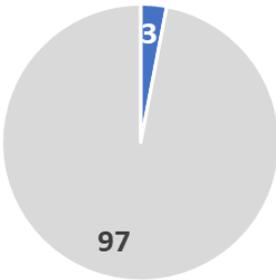
EU27 Until 2019	13 or 14 airline companies in 9 or 10 Member States	(3,203)	(8%) of 40,000	(7,077)	(5%) of 140,000	In 1 or 2 Member States
As of 2020	8 airlines In 6 MS	1973	5%	4095	3%	In one MS (NL)

Notes: n.a., data not available. Neos in Italy is marked in yellow as the Eurofound national correspondent reported that it is not affiliated to AIRE. Orange shading indicates that the AIRE website no longer refers to TUI (Germany, Belgium, the Netherlands, Sweden) or Novair (Sweden) as a member. This study assumes that they are no longer members. The 5 airlines marked in blue are leisure airlines (see section 5.2.4). The red marked cells indicate the airlines that used to be affiliated to AIRE up until 2019.

Source: Network of Eurofound Correspondents, 2020

Some of AIRE's member companies only employ aircrew in one country. TUI fly, through its operations in Belgium, Germany, the Netherlands and Sweden, employs aircrew in four Member States. Together, companies represented by AIRE employ aircrew in 10 Member States up until 2019, and only in 6 Member States since 2020. For the orange marked Member States there was an affiliated airline until 2019, but since 2020 not anymore (Figure 28).

Figure 28: AIRE members employing pilots and cabin crew, 2019

6% of EU pilots are employed by airlines affiliated to AIRE	6 Member States have an AIRE airline employing pilots			3% of EU cabin crew are employed by airlines affiliated to AIRE	6 Member States have an AIRE airline employing cabin crew		
	AT	ES	LV		AT	ES	LV
	BE	FI	MT		BE	FI	MT
	BG	FR	NL		BG	FR	NL
	CY	HR	PL		CY	HR	PL
	CZ	HU	PT		CZ	HU	PT
	DE	IE	RO		DE	IE	RO
	DK	IT	SE		DK	IT	SE
	EE	LT	SI		EE	LT	SI
	EL	LU	SK		EL	LU	SK

Source: Table 90

Based on the available information, AIRE member companies also employ ground handling service staff in at least three Member States.

Airlines affiliated to AIRE are among the largest three employers of aircrew in seven Member States. LOT in Poland and AirExplore in Slovakia are the largest airline employers in their countries. Four other AIRE members are the second-largest airlines in their countries. These are TUI fly in Belgium, TUI

Nordic in Sweden, Transavia in the Netherlands and Sunclass Airlines in Denmark. TUI fly in Germany is the third-largest airline company, just as TUI fly Netherlands is the third largest in the Netherlands.

Figures in Table 91 are derived from a database with exact numbers of registered aircraft for each airline company and each Member State where they are registered, the number of passenger seats in these aircraft and their MTOW. The number of passenger seats represents the passenger capacity of the given airline, and the MTOW offers an indication of its capacity in freight air transport.

Based on the information in the Cirium database for 2019, AIRE-affiliated companies collectively operated 238 aircraft, or 5% of the 5,073 registered aircraft in the EU27 in 2019. Aircraft operated by AIRE members had a total of 46,505 passenger seats, which is 6.65% of the EU27 total of 699,447 passenger seats in 2019. There was an average of 195 passenger seats per aircraft operated. The MTOW of the AIRE members was 26,554,048 kg, which is 5.8% of the total of all airlines in the EU27.

Table 91: AIRE member aircraft, seats and MTOW, 2019

Member State	Airline	Aircraft registered in 2019	Aircraft in this country in 2019	% of all aircraft in country	% of all seats in country	% of total MTOW in country
BE	TUI fly Belgium	25	148	17	29	16
DE	TUI fly	25	823	3	4	2
DK	Sunclass Airlines	14	117	12	45	30
ES	Alba Star	5	511	1	1	0.8
ES	Evelop Airlines	5		1	2	2
ES	Wamos Air	12		2	5	7
IT	Neos	12	244	5	10	8
NL	Transavia Airlines	33	234	14	14	8
NL	TUI Airlines Nederland	7		3	4	4
PL	LOT Polish Airlines	86	179	48	53	61
PT	EuroAtlantic Airways	6	202	3	7	8
SE	Novair	2	255	1	1	1
SE	TUI fly Nordic	4		2	3	3
SK	AirExplore	2	8	25	65	11
EU27 up to 2019	14 airline companies in 10 Member States	238	5,073	5	7	6
As of 2020	6 Member States	165		3	5	4

Note: The orange marked cells indicate airlines that were affiliated with AIRE up until 2019, but are no longer members. Neos in Italy is marked in yellow as the Eurofound national correspondent reported that it is not affiliated to AIRE.

Source: Cirium database

Considering the typology of air transport companies developed in Chapter 3, the AIRE membership represents more than one-third of the aircraft operated by leisure airlines (Table 92). The single network carrier and the single low-cost airline affiliated to AIRE represent, respectively, 6% and 3% of the aircraft in those categories. This shows that AIRE largely represents leisure airlines.

Table 92: Types of air transport companies in AIRE membership, 2019

Type of air transport company	Affiliates of AIRE in this category	Number of aircrafts of AIRE affiliates	% of all aircraft in this category	Average number of passenger seats per aircraft
Leisure	TUI fly , Alba, Evelop (now IberoJet), Wamos, Neos , EuroAtlantic, Novair, AirExplore	119 46	36 14	240
Largest main airline	LOT	86	6	139
LCC	Transavia	33	3	180

Notes: Since 2020, TUI Fly and Neos are no longer member of AIRE. The red marked companies and numbers are striked through, they represent the situation up to 2019. The other numbers are for the year 2019 – but the corrections provide an indication of the situation as of 2020, based on numbers from 2019.

Source: Chapter 5

7.3.2. AIRE members in the social partner structures of their countries

The second representativeness criterion in Commission Decision 500 of 1998 stipulates that European social partner organisations be an integral and recognised part of Member States' social partner structures (see section 0.1).

Only very few airlines affiliated to AIRE provided information on whether they are involved in collective bargaining on behalf of pilots, cabin crew or ground handling staff. Based on the available information, there are seven affiliated airlines involved in single-employer collective bargaining. AIRE has members directly involved in collective bargaining in Belgium, Germany, Denmark, Spain, the Netherlands and Poland. In Sweden, the AIRE member applies a sectoral multi-employer collective bargaining agreement negotiated between the employer organisation Transportföretagen and Swedish trade unions. TUI fly Nordic is affiliated to Transportföretagen. In Spain, AIRE member companies are also involved in sectoral employer organisations, namely ACEA (for Alba and Wamos) and ALA (Evelop). In Denmark, Sunclass Airlines is a member of the cross-industry employer organisation DI. Similarly, in Poland, LOT is a member of the cross-industry employer organisation ZPP.

Table 93: Involvement of AIRE-affiliated companies in company-level collective bargaining

Member State	Company	Collective bargaining on behalf of			SEB/MEB	Is the company a member of an employer organisation?	Consulted as company	Social dialogue bodies	
		Pilots	Cabin crew	Ground handling staff				Bipartite	Tripartite
BE	TUI fly Belgium	n.a.	n.a.	n.a.	SEB + MEB	no			
DE	TUI fly	n.a.	n.a.	n.a.	SEB	no			
DK	Sunclass Airlines				SEB	DI (cross-industry)	yes		
ES	Alba Star				no	AECA			

ES	Evelop Airlines	n.a.	n.a.	n.a.	SEB	ALA			
ES	Wamos Air				no	AECA	no		
IT	Neos				no	no	no		
NL	Transavia Airlines				SEB	n.a.			
NL	TUI fly Netherlands				SEB	n.a.			
PL	LOT Polish Airlines				SEB	ZPP (cross-industry)	no		
PT	EuroAtlantic airways				no	no	no		
SE	Novair				no	Transportföretagen	yes		
SE	TUI fly Nordic	n.a.	n.a.	n.a.	MEB	Transportföretagen			
SK	AirExplore				no				

Notes: n.a., data not available. Purple cells indicate companies involved in collective bargaining of the company workforce in this category covered by these single employer bargaining agreements. Grey cells indicate companies that are consulted on sector-related matters by the government or that are involved in bipartite or tripartite sectoral social dialogue in their country. The red marked cells indicate airlines that used to be affiliated to AIRE up to 2019, but are not longer member. Neos in Italy is marked in yellow as the Eurofound national correspondent reported that it is not affiliated to AIRE.

Source: Network of Eurofound Correspondents, 2020

Only Sunclass in Denmark and Novair in Sweden are consulted by their governments on sector-related matters. In the Netherlands, both Transavia and TUI fly Netherlands take part in bipartite social dialogue at company level. None of the AIRE-affiliated airlines is involved in sectoral social dialogue bodies in its country. There are member companies in Belgium, Germany, Italy and Portugal that are not affiliated to national sectoral employer organisations in their country.

Table 94: National sectoral employer organisations in the Member States with AIRE-affiliated companies

Member State	Employer organisation	Collective bargaining involvement				Consulted	Social dialogue body		Type of organisation	Representativeness of organisation	National affiliation	European affiliation
		Pilots NACE 51.10	Pilots NACE 51.21	Cabin crew	ATM/ ground handling		Bipartite	Tripartite				
BE	BAR	yes	yes	yes	no	yes	yes	no	EO	yes	no	no
BE	BATA	yes	yes	yes	no	yes	yes	no	EO	yes	FEB-VBO	no
DE	AGVL	yes	yes	yes	no	yes	n.a.	n.a.	EO	yes	BDA	no
DK	DI	yes	yes	yes	yes	yes	no	no	EO	yes	DA	no
ES	ALA								BA			
ES	AECA	yes	yes	yes	no	no	no	no	EO	yes	CEOE	no
IT	Assaereo	yes	yes	yes	yes	n.a.	no	no	EO	yes	Confindustria	no
SE	Transportföretagen	yes	yes	yes	no	yes	yes	no	EO	yes	SN	ERA

Note: EO, employer organisation. The dark green cells indicate that this employers organisation has affiliated companies that operate as an employer for this part of the sector; the light green cells indicate the organisation's involvement in consultations and in social dialogue. The yellow cells indicate the employers organisations, the blue cells indicate the organisations that are recognised as representative for the sector in the country.

Source: Network of Eurofound Correspondents, 2020

7.3.3. AIRE's autonomy and capacity to negotiate

The third criterion to assess representativeness, according to Commission Decision 500 of 1998, is that European social partner organisations have adequate structures to ensure effective participation in the ESSDC.

AIRE does not have a statutory mandate to negotiate. As the organisation did not provide any information on how it can mobilise a mandate among its members or take decisions on ESSDC texts, no further indications of its capacity to negotiate can be given here.

AIRE is a European association of airlines with the aim of establishing the most cost-effective environment for European aviation and advocating against 'overregulation' of the civil aviation sector. While demanding economic regulation of monopoly service providers, AIRE does not prioritise any business model in the sector over others. The association commits itself to monitoring, and informing its affiliates of, all regulatory developments on environmental issues, consumer policy, taxation and social affairs. It speaks out in favour of optimising airspace capacity and route networks. Internally, AIRE comprises decision-making and executive bodies, such as the annual general meeting of members, the board of directors and the director-general secretariat. Moreover, AIRE has set up several committees, councils and working groups on a variety of topics and issues, such as the national and European regulatory frameworks governing environmental matters, consumer rights, infrastructure, traffic rights, ATM, and flight operation developments and conditions. There is no indication on AIRE's website that it is entitled to take positions on its members' activities or to represent them on matters relating to working conditions.

7.4. European Regions Airline Association

ERA represents mainly regional airlines. It also has regional airports among its members, although all but two are also represented by ACI Europe, which has a much stronger focus on airports. ERA represents some cargo and charter air transport activities and a variety of aviation services, including manufacturers and suppliers.

7.4.1. ERA's membership domain and composition

ERA represents regional airlines and airports, but also companies active in aircraft maintenance and aviation training, as well as leasing, financing and legal services. The diverse membership composition will be presented here in three parts: first, the airlines operating as employers of aircrew; second, airports affiliated to ERA, which operate as employers of ground service staff; and, finally, examples of employers in other categories of ground service providers.

Table 95: Airlines affiliated to ERA

Member State	Operator	Aircraft	Seats	% of seats	MTOW (kg)	% of MTOW
BE	ASL Airlines Belgium	32	n.a.	n.a.	3,488,531	26.61
CY	Tus Airways	3	260	39.27	127,913	23.90
DE	Hahn Air	2	16	0.01	27,216	0.03
DK	Air Alsie A/S	18	336	4.07	493,975	6.88
EL	Sky Express	11	638	4.93	225,596	3.77
ES	Air Nostrum	45	3,956	4.74	1,584,186	3.21
ES	Binter Canarias	28	2,264	2.71	809,807	1.64
FI	Nordic Regional Airlines	24	2,064	13.02	870,597	8.95
FR	ASL Airlines France	18	1,416	1.87	1,235,766	2.15

FR	HOP!	71	5,703	7.55	2,543,377	4.43
FR	Amelia	1	13	0.02	22,226	0.04
HR	Trade Air	2	289	17.32	121,452	16.70
HR	Croatia Airlines	12	1,380	52.68	605,641	83.30
HU	ASL Airlines Hungary	2	n.a.	n.a.	136,078	1.51
IE	ASL Airlines Ireland	33	n.a.	n.a.	1,469,365	3.72
IE	CityJet	4	380	0.41	175,994	0.45
LT	Avion Express	7	1,340	40.45	563,500	34.33
LU	Luxair	20	2,214	70.00	951,074	6.72
NL	KLM Cityhopper	49	4,696	10.71	2,166,777	6.78
PT	SATA Air Açores	6	394	1.59	151,228	0.94
PT	Portugalia Airlines	20	1,916	7.71	821,860	5.09
RO	Blue Air	18	3,025	41.68	1,303,578	38.92
RO	Carpatair	3	300	4.13	133,356	3.98
SE	Braathens Regional Airways	17	1,152	3.40	383,852	2.09
EU27 (17 MS)	ERA-affiliated airlines	446	33,752	n.a.	20,412,945	n.a.
	All airlines	5,074	699,447	n.a.	456,619,537	n.a.
	% of ERA affiliates	8.79	4.83	n.a.	4.47	n.a.

Note: *n.a.*, no data available. In Sweden, the employer organisation *Transportföretagen* is also a member of ERA. *Transportföretagen* represents both aircrew and ground handling service employers. This is the only employer organisation from the EU27 affiliated to ERA.

Source: Cirium database and authors' own calculations

Table 95 lists the 24 airlines affiliated to ERA in 17 Member States. Together they represent 9% of aircraft in the EU27, 5% of passenger seats and 4.5% of the MTOW. In 10 Member States, ERA-affiliated airlines are among the largest three employers of aircrew. The largest aircrew employers from Croatia and Luxembourg are affiliated to ERA. The second-largest aircrew employers in Croatia, Cyprus, Finland, France, Hungary, Portugal and Romania are affiliated to ERA. In Belgium, Lithuania and Portugal, the third-largest employers of aircrew are affiliated to ERA.

Of the 24 affiliated airlines, 11 in nine Member States are considered regional. The 11 together operate 58% of the aircraft of all EU27 regional airlines. With the affiliation of the cargo airline ASL in Belgium, France, Hungary and Ireland, ERA represents 37% of all EU27-operated cargo aircraft.

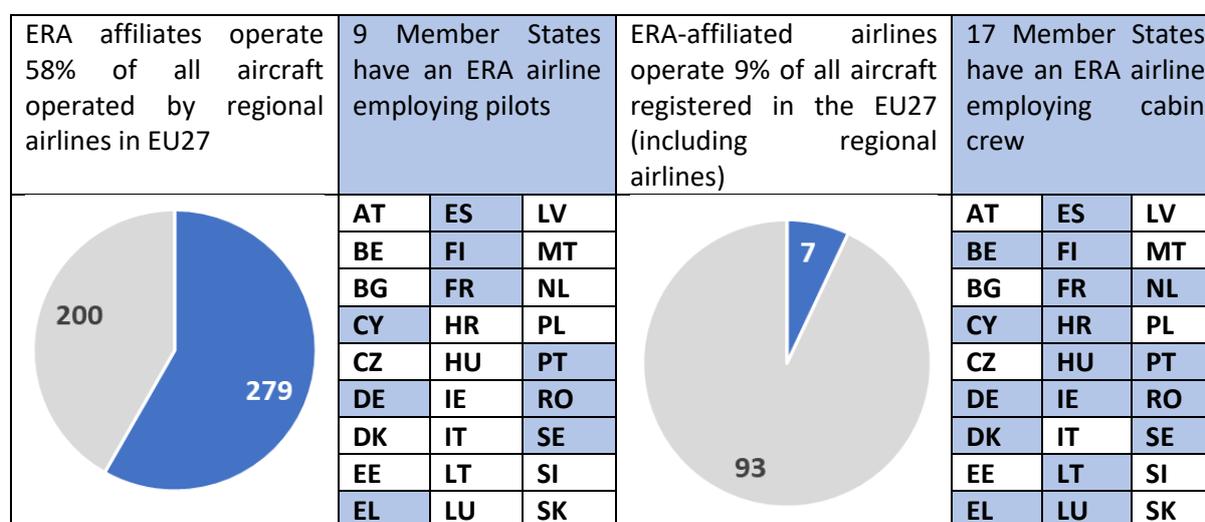
Among charter aviation companies, ERA has affiliates in Denmark, France, Hungary and Ireland. They correspond to 10% of the aircraft of charter airline companies. The greatly varying numbers of passenger seats of the aircraft indicate the diversity in this group. Amelia operates just 1 aircraft with 13 seats, while Air Alsie operates 18 aircraft with an average of 18 seats per aircraft. CityJet has an average of 95 seats per aircraft, and Avion Express, which operates as a charter for network carriers and leisure airlines, averages 191 seats per aircraft. Finally, two smaller network carrier airlines from Croatia and Romania and the low-cost airline Blue Air from Romania are also affiliated to ERA. These airlines each represent 2% of the aircraft in their category.

Table 96: Types of air transport companies affiliated to ERA, 2019

Type of air transport company	Affiliates of ERA in this category	Number of aircraft of ENAA affiliates	% of all aircraft in this category	Average number of passenger seats per aircraft
Regional airlines	TUS Airways (CY), Hahn Air (DE), Air Nostrum (ES), Sky Express (EL), Binter (ES), Nordic Regional Airlines (FI), Air France HOP! (FR), Azores Airlines (PT), Portugalia Airlines (PT), CarpatAir (RO), Braathens Regional Airways (SE)	279	58	84
Cargo	ASL Airlines Belgium (BE), ASL (FR), ASL (HU), ASL Ireland (IE)	85	37	0
Charter	Air Alsie (DK), Amelia (FR), CityJet (IE), Avion Express (LT)	30	10	69 (18, 13, 95, 191)
Smaller main airlines	Croatian Airlines (HR), Luxair (LU)	32	2	112
LCC	Blue Air (RO)	18	2	168

Source: Chapter 3

Figure 29: ERA representing employers of aircrew, 2019



Source: ERA

ERA also represents a wide variety of employers providing ground services. ERA has 11 regional airport affiliates in seven Member States (for detailed analysis, see Table 98). There is only one large airport among them (more than two million passengers in 2018). The smaller member airports represent 3% of all smaller airports in EU27. Other industries represented by ERA are listed in Table 97. ERA has a significant degree of representativeness among employers of aircraft maintenance services, in at least six Member States.

Table 97: ERA-affiliated employers of different types of ground services, 2019

Type (number of Member States)	Employers
airports (7)	Linz (AT), Salzburg (AT), Innsbruck (AT), Antwerp International (BE), Ostend-Bruges (BE), Aarhus (DK), Nantes Airport (FR), Pula (HR), Shannon (IE), Waterford (IE), Groningen (NL)
Maintenance (6)	X-air services (BE), Skyways Technics (DK), Airbus (FR), Sabena Technics (FR), Contact Air Technic (FR), REVIMA (FR), Lufthansa Technik (DE), MTU Maintenance (DE), 328 Support Services (DE), Fokker Services (NL), SAMCO Aircraft Maintenance (NL), Medavia Technics (PT)
Leasing/financing (4)	Nordic Aviation Capital (DK and IE), Elix Aviation Capital (IE), Macquarie AirFinance (IE), Aircastle (IE), Chorus Aviation Capital (IE), Magellan Aviation Group (IE), Mass Lease (NL), Rockton (SE)
Legal services (3)	Pierstone (BE), Vogeler Rechtsanwälte (DE), LPLG (FR)
Training (1)	AMST-Aviation (AT), AMS Flight Training (AT)
ATM services (4)	Antwerp International Airport (BE), X-air services (BE), Nantes Airport (FR), Croatian Airlines (HR), Luxair (LU)

Source: Network of Eurofound Correspondents, 2020

Table 98: Assessment of the representativeness of 11 ERA-affiliated airports

Member State	Airports with more than two million passenger movements or 50,000 tonnes of freight in 2018			Number of smaller airports open to commercial traffic in 2018	Names of smaller airports with fewer than two million passenger movements and less than 50,000 tonnes of freight in 2018	Number of smaller airports affiliated to ERA	% of all smaller regional airports represented by ERA
	Number	Name of large airport affiliated to ERA	Number affiliated to ERA				
AT				5	Graz, Klagenfurt, Linz, Salzburg, Innsbruck	3	60
BE				3	Antwerp International, Kortrijk-Wevelgem, Ostend-Bruges	2	67
DK				7	Aalborg, Aarhus, Bornholm, Midtjyllands, Esbjerg, Sønderborg, Roskilde	1	14
FR	12	Nantes	1	48* (+25)		0	0
HR				6	Zadar, Pula, Osijek, Brač, Rijeka, Lošinj	1	17
IE				5	Shannon, Ireland West Airport Knock, Kerry, Donegal, Waterford	2	40
NL				2	Groningen, Rotterdam The Hague	1	50
EU27	94		1 in FR 1%	376**	In 6 Member States, where there is a total of 28 smaller airports, of which 36% are affiliated to ERA	10	2.7

Notes: For a complete list of all airports, see Table 110. * Airports with fewer than 10,000 passenger movements a year are not considered; ** Airports with fewer than 10,000 passengers a year are not considered in France and Germany. Airports affiliated to both ERA and ACI Europe are highlighted in green. Airports only affiliated to ERA are highlighted in blue.

Source: European Commission Communication 2019/C336/02, and own calculations

In Sweden, the employer organisation Transportföretagen is also a member of ERA. Transportföretagen represents both aircrew and ground handling service employers. This is the only employer organisation from the EU27 affiliated to ERA.

Most ERA members are only affiliated to ERA. There are three groups of exceptions in which companies are represented by other organisations in the ESSDC. The largest group is the 7 of the 11 airports affiliated to ERA that are also affiliated to ACI Europe. Airports that are members of both ERA and ACI Europe are Salzburg, Linz and Innsbruck (Austria), Antwerp International (Belgium), Aarhus (Denmark), Nantes Atlantique (France) and Groningen (Netherlands). The four airports that are only represented by ERA are Ostend-Bruges (Belgium), Pula (Croatia), and Shannon and Waterford (Ireland).

The two companies that are affiliated both to ENAA and ERA are Croatian Airlines and Lufthansa. Lufthansa is, however, only represented by ERA for its aircraft maintenance activities, not as an employer of aircrew.

The list of members provided by ERA (Table 99) exceeds by far the 37 company members and 3 organisational members shown in previous tables, and the coverage in terms of countries is significantly higher. Table 94 indicates that ERA has 170 affiliates in 25 current and former Member States. Only in Bulgaria, Poland and Slovenia are there no members. The largest number of affiliates (62) is in the UK (most of which, however, are aviation services, supplier or manufacturer members, and thus not directly related to the sector), while there are a number of Member States with only one ERA affiliate (Cyprus, Czechia, Estonia, Finland, Hungary, Luxembourg, Latvia and Slovakia). Overall, it has proved difficult to assess whether each individual affiliate is really related to the civil aviation sector and thus qualifies for inclusion in this study.

Table 99: ERA membership numbers per country (total)

MS	AT	BE	BG	CY	CZ	DE	DK	EE	EL	ES	FI	FR	HR	HU	Total
Number of ERA members	5	4	0	1	1	15	9	1	3	4	1	18	3	1	170
MS	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK	UK	
Number of ERA members	16	2	2	1	1	2	7	0	2	2	6	0	1	62	

Notes: Table includes all types of members (associations and companies). Most members are deemed to be not related to the civil aviation sector as defined for the purpose of this study

Source: ERA

Table 99 mainly includes airlines, but also regional airports and ground handling/service providers. Due to its broad membership domain with regard to both business activities and types of enterprise, ERA represents almost all activities found in the sector. Since ERA organises not only airlines, aviation service providers and airports but also manufacturers (of aircraft components and engines) and suppliers of and traders in aeronautical material, its membership domain overlaps with regard to the entire civil aviation sector. Table 97 presents other types of member companies, nevertheless regional airlines constitute the core of ERA's total membership. Affiliations in addition to ERA are mainly to ACI Europe and of airport members.

7.4.2. Position of ERA affiliates in the national social partner landscape

ERA has one affiliated employer organisation (in Sweden) that is involved in multi-employer bargaining, and 21 affiliated companies taking part in single-employer bargaining. In total, ERA has affiliates involved in collective bargaining in 12 Member States (see Table 100 below). A detailed analysis of their involvement in collective bargaining, and whether they are consulted or involved in social dialogue bodies, can be found in Table 101.

Table 100: ERA-affiliated employer organisations and companies involved in collective bargaining

Member State	Organisation/company	Aircrew employer	Ground handling services employer	MEB/SEB
SE	Transportföretagen	EO	EO	MEB
BE	Antwerp International Airport			SEB
BE	X-air services			SEB
BE	ASL Airlines Belgium			SEB
DE	Lufthansa			SEB
DK	DAT			SEB
DK	Jet Time			SEB
DK	Aarhus Airport			SEB
DK	Skyway Technics			SEB
ES	Air Nostrum			SEB
ES	Binter			SEB
FI	Norra/N7			SEB
FR	HOP!			SEB
FR	Nantes Airport			SEB
FR	Sabena Technics			SEB
HR	CTN			SEB
LU	Luxair			SEB
MT	Mediavia			SEB
NL	GAE			SEB
PT	SATA			SEB
PT	PGA			SEB

Notes: EO, employer organisation; MEB, multi-employer bargaining; SEB, single-employer bargaining. Coloured cells indicate positive answer.

Source: Network of Eurofound Correspondents, 2020

Table 101: ERA-affiliated companies and their involvement in the national social partner landscape

Member State	Company	% of sectoral workforce	Baggage handling staff	Ticket desk, check-in and boarding	Airport security	Maintenance and overhaul	Airport fire services	Services to aircraft such as fuel, catering, de-icing and pushbacks	Other	Collective bargaining	% of ground handling staff covered	Consulted	Bipartite social dialogue	Tripartite social dialogue	Affiliation to national employer organisation
AT	Salzburg Airport	2–3	115	71	140		67		yes	no		yes			WKÖ-FVALS
AT	Linz Airport	1–2								no		n.a.			WKÖ-FVALS
AT	Innsbruck Airport	1–2								no		n.a.			WKÖ-FVALS
BE	Antwerp International Airport									SEB		no	no	no	no
BE	X-air Service									SEB		no	no	no	n.a.
DK	Aarhus Airport	1								SEB		yes	no	yes	DI
DK	Skyway Technics	1	0	0	0	100	0	0	0	SEB	1	yes	no	no	DI
ES	Air Nostrum		0	89	3	245	0	n.a.	0	SEB	100	no	no	no	ALA, ASEATA
FI	Norra/N7	5	0	0	0	0	0	34	26	SEB		yes	no	no	Palta
FR	Nantes Airport	< 1								SEB	< 1	no	no	no	UAF
FR	HOP!	3								SEB	2	no	no	no	n.a.
FR	Sabena Technics	< 1	0	0	0	1,000	0	0	0	SEB	< 1	no	no	no	n.a.
HR	CTN Croatian Airlines		0	0	0	100	0	0	0	SEB		no	no	no	HUP
LT	DAT LT	12	0	0	0	n.a.	0	0	0	no	0	yes	no	no	LAVIA
LU	Luxair	30								SEB		yes	no	no	no
NL	Groningen Airport		< 25	< 25	0		< 25	< 25		SEB	< 1	no	yes	no	no
SE	Braathens Regional Airlines	7	40	40	0	20	0	0	400	no	0	yes	no	no	Transportföretagen

Notes: n.a., data not available; SEB, single-employer bargaining. Yellow marked cells indicate answers that have not been confirmed.

Source: Network of Eurofound Correspondents, 2020

ERA has affiliated companies that are consulted by their governments in Austria, Denmark, Finland, Lithuania, Luxembourg and Sweden. There are only two ERA members that are involved in social dialogue bodies: Aarhus Airport in Denmark and Groningen Airport in the Netherlands.

Eight ERA-affiliated member companies are also affiliated to national employer organisations, which gives them ties to sectoral industrial relations. This is the case in Austria, Denmark, Spain, Finland, France, Croatia, Lithuania and Sweden.

7.4.3. ERA's autonomy and capacity to negotiate

ERA was established in 1980 and views itself as trade association representing several dozen airlines and some 150 members that are only partially sector-related (as defined for the purpose of this study), including manufacturers, (smaller) airports, suppliers and aviation service providers. ERA is thus the collective voice of multiple businesses, mainly at regional level, that are – in various ways – related to the civil aviation sector vis-à-vis Europe's major regulatory bodies and authorities. ERA-affiliated airlines carry about 77 million passengers per year and operate about 1.2 million flights on more than 2,700 routes

The ERA secretariat has 10 staff members, of whom three are regularly involved in European sectoral social dialogue activities. ERA's head office is in Surrey, UK, and it has an office in Brussels in the Eurocontrol building. Its activities are 100% financed by membership fees. ERA has a website with a members-only section that is used for internal consultations and sensitive internal documents.

The association is governed by the general meeting, assembling the members, the presidency, the board and the directorate. ERA reports that it has the capacity to negotiate policy agreements, although not individual agreements. It indicates that there is a standard mandating and decision-making procedure, but also an ad hoc procedure and a case-by-case approach to mandating and decision making on ESSDC texts. These procedures or approaches are, however, not formalised in the statutes or in any other rules of procedures, concerning ESSDC texts.

ERA has an operations group, which discusses ESSDC initiatives internally. A subgroup meets quarterly to discuss developments. The ERA board is updated quarterly on ESSDC activities or initiatives. If needed, an ERA mandate is mobilised through internal communication and coordination channels. Final decisions on ESSDC texts are taken on the basis of a draft that is communicated to the ERA operations group, in conjunction with the senior advisor and the director-general. As a member of the ESSDC aircrew working group, it is the director-general who signs off on ESSDC texts. Dissemination of ESSDC texts or other information is done through ERA's website, members updates and social media.

7.5. Airports Council International – Europe

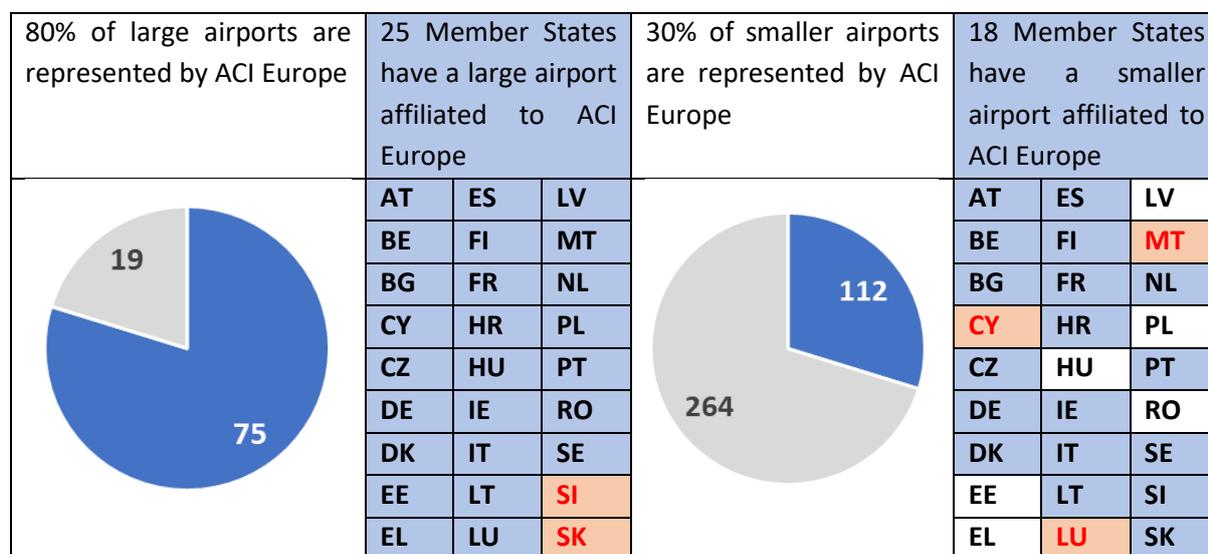
ACI Europe represents almost all large airports in the EU27 and a significant number of smaller airports.

7.5.1. ACI Europe's membership domain and composition

ACI Europe organises airports and companies operating a group of airports. Most of the larger airports (80%) and about one-third of the smaller airports are represented by ACI Europe. It has affiliated airports in all 25 Member States where airports with more than two million passenger movements and/or 50,000 tonnes of freight are located. Slovakia and Slovenia are the only two Member States

without airports that meet the criteria for large airports. ACI Europe also represents smaller airports in 18 Member States, as indicated in Figure 30 and Table 102.

Figure 30: Large and smaller airports in EU27 affiliated to ACI Europe, 2019



Notes: The Member States marked in blue indicate those for which ACI Europe has an affiliated airport. The white cells indicate the Member States where there is an airport in this category but not one affiliated to ACI Europe. The Member States marked in red indicate those for which there is no airport in this given group size.

Source: ACI Europe

Figure 30 gives an overview of the number of large and smaller airports in each Member State and the numbers and percentage affiliated to ACI Europe. The names of the airports can be found in Table 110. The blue cells in Figure 30 indicate Member States in which all larger or all smaller airports are represented by ACI Europe. Of the 25 Member States with larger airports, 18 have larger airports that are represented by ACI Europe. No confirmation of the affiliation of Maastricht Aachen and Stockholm Skavsta has been obtained, but if these two airports are also affiliated, the total number would be 20. The five Member States where some of the larger airports are represented by ACI Europe, but not all, are Germany, France, Ireland, Italy and Poland.

Table 102: ACI Europe representation in larger and smaller airports in the EU27

Member State	Airports with more than two million passenger movements or 50,000 tonnes of freight in 2018		Number of smaller airports open to commercial traffic in 2018		% of all airports represented by ACI Europe
	Number of larger airports	Number affiliated to ACI Europe	Number of smaller airports	Number affiliated to ACI Europe	
AT	1	1	5	5	100
BE	3	3	3	1	67
BG	3	3	2	1	80
CY	2	2	0	0	100
CZ	1	1	73	4	7
DE	14	2	25*	0	5
DK	2	2	7	1	33
EE	1	1	4	0	20

EL	8	8	31	31	100
ES	19	19	31	29	96
FI	1	1	23	21	91
FR	13	6	73*	24	55
HR	3	3	6	0	50
HU	1	1	6	0	14
IE	2	1	5	3	14
IT	20	5	22	0	12
LT	1	1	3	2	80
LU	1	1	0	0	100
LV	1	1	1	0	50
MT	1	1	0	0	100
NL	3	2	2	2	80
PL	7	1	7	0	7
PT	4	4	16	6	50
RO	2	2	15	0	12
SE	5	4	39	32	95
SI	0	0	3	2	67
SK	0	0	5	1	17
EU27	119	76 (64%)	407*	165(41%)	46%
Number of Member States with an affiliated airport		25 of 25 MS In 18 MS all large airports are affiliated		16 of 24 MS In 3 MS all small airports are affiliated	

Notes: More details on all airports can be found in Table 110. * Airports with annual traffic under 10,000 passengers have not been taken into account in France and Germany. The blue cells indicate the Member States for which all airports of the given size group are affiliated to ACI Europe. The yellow cells indicates that there are airports for which it is not clear whether they are (in)directly affiliated to ACI Europe, meaning that the real percentage might eventually be higher than the indicated one.

Source: European Commission Communication 2019/C336/02, and authors' own calculations.

Almost all of the 20 largest passenger airports (each with more than five million passengers in 2019) and the 10 largest freight airports are represented by ACI Europe (see Table 103). Green cells indicate that airports are affiliated to ACI Europe. Of the 20 largest passenger airports, 18 are directly affiliated to ACI Europe, and of the 10 largest freight airports, 8 are ACI Europe affiliated. This gives ACI Europe a strong membership base in both passenger and freight airports.

Table 103: ACI Europe representation among the largest passenger airports and largest freight airports

20 largest airports in EU27 with more than 5 million passengers				10 largest freight airports	
Airport	Passengers in 2019	Airport	Passengers	Airport	Freight (thousand tonnes)
Frankfurt	270,150,072	Lisbon	31,173,000	Frankfurt	1,911
Paris Charles de Gaulle	76,150,007	Copenhagen	30,256,703	Paris Charles de Gaulle	1,740
Amsterdam Schiphol	71,707,144	Palma de Mallorca	29,721,123	Amsterdam Schiphol	1,455
Madrid-Barajas	61,734,037	Milan Malpensa	28,846,299	Leipzig/Halle	1,377
Barcelona-El Prat	52,686,314	Nice Côte d'Azur	14,485,423	Liège	1,026
Munich	47,941,348	Lyon-Saint Exupéry	11,739,600	Luxembourg	905
Rome Fiumicino	45,532,573	Marseille Provence	10,151,743	Cologne Bonn	842
Paris Orly	31,853,049	Toulouse-Blagnac	9,620,224	Milan Malpensa	516
Dublin	32,907,673	Bordeaux-Mérignac	7,703,135	Brussels	512
Vienna International	31,662,189	Nantes	7,227,411	Madrid-Barajas	371

Note: Green cells indicate airports represented by ACI Europe.

Source: Aeroaffaires (undated), Statista (2022b, undated)

Table 104 indicates the types of ground handling activities, and the number of Member States where ACI Europe represents airports operating as employers of staff carrying out these specific activities.

Table 104: Types of ground handling activities for which ACI Europe members act as employers

Activity	Member States where ACI Europe has employers of these types of ground handling services affiliated	Number of Member States
Baggage handling	AT, CZ, DE, ES, HR, NL, RO, SI	8
Ticket desk, check-in and boarding	AT, CZ, DE, EE, ES, HR, NL, SI	8
Airport security	AT, CZ, DE, DK, EE, HR, HU, IE, IT, RO	10
Maintenance and overhaul	EE, HR, IT	3
Airport fire services	AT, CZ, DE, EE, HR, IE, NL, RO, SI	9
Services to aircraft such as fuel, catering, de-icing and pushbacks	EE, HR, HU, NL, RO, SI	6
Other ground services (not specified)	AT, CY, CZ, DK, EE, ES, HR, IE, IT, RO, SI	11

Note: This information was provided for 14 Member States: Austria, Croatia, Cyprus, Czechia, Denmark, Estonia, Germany, Hungary, Ireland, Italy, the Netherlands, Romania, Slovenia and Spain.

Source: Network of Eurofound Correspondents, 2020

Two airports affiliated to ACI Europe also employ ATM and ATC staff: Dubrovnik Airport in Croatia and HCAA in Greece. HCAA is a company operating several airport, it is also affiliated to CANSO. It can be assumed that it is only affiliated to ACI Europe for its ground service activities, included in Table 99. There are 11 Member States in which ACI Europe member airports employ staff in ‘other’ (not specified) ground services.

Most of the ACI Europe-affiliated airports are only affiliated to ACI Europe. Only seven airports indicated that they are affiliated to both ACI Europe and ERA: Salzburg, Linz and Innsbruck Airports in Austria; Antwerp International Airport in Belgium; Aarhus Airport in Denmark; Nantes Airport in France; and Groningen Airport in the Netherlands. Except for Nantes Airport, these are all smaller airports.

7.5.2. ACI Europe members in the social partner landscape in their countries

ACI Europe has affiliated airports that are involved in single-employer bargaining in 18 Member States. In Belgium, ACI Europe has affiliated airports but no information was provided on their involvement in company level collective bargaining. The seven Member States where ACI Europe has affiliated airports but none are involved in collective bargaining are Austria, Cyprus, Estonia, Germany, Hungary, Lithuania and Sweden. In Austria, Germany, Estonia, Hungary and Sweden, there is an affiliated airport involved in either bipartite or tripartite social dialogue as well as an airport affiliated to a national sector-related employer organisation. This leaves only Cyprus and Lithuania with an affiliated airport without clear integration into the collective bargaining or social dialogue landscape of the country.

Table 105: Member States in which ACI Europe members are integrated into the collective bargaining and social dialogue landscape

Type of integration	Member States	Number of Member States
Collective bargaining at company level	BG, CZ, DK, ES, FI, FR, EL, HR, IE, IT, LV, LU, MT, NL, PL, PT, RO, SI	18
Consultation by governments	AT, DE, DK, EE, FR, Lt, LV, MT	8
Bipartite social dialogue	HU, NL, SE	3
Tripartite social dialogue	AT, DK, SE	3
Affiliation to a national employer organisation	AT, CZ, DE, DK, EE, ES, FR, HU, LV, RO, SE, SI	12

Source: Table 106

Table 106: ACI Europe members’ involvement in collective bargaining, social dialogue and national employer organisations

Member State	Company	Collective bargaining (SEB or MEB)	% of ground handling staff covered	Consulted	Bipartite social dialogue	Tripartite social dialogue	National affiliation to employer organisation
AT	Vienna International Airport	no	n/a	yes	no	yes	WKÖ-FVALS

Member State	Company	Collective bargaining (SEB or MEB)	% of ground handling staff covered	Consulted	Bipartite social dialogue	Tripartite social dialogue	National affiliation to employer organisation
AT	Salzburg Airport	no	n/a	yes	n.a.	n.a.	WKÖ-FVALS
AT	Graz Airport	no	n/a	yes	no	no	WKÖ-FVALS
AT	Klagenfurt Airport	no	n/a	n.a.	n.a.	n.a.	WKÖ-FVALS
AT	Linz Airport	no	n/a	n.a.	n.a.	n.a.	WKÖ-FVALS
AT	Innsbruck Airport	no	n/a	n.a.	n.a.	n.a.	WKÖ-FVALS
BG	Sofia Airport	SEB	n.a.	n.a.	n.a.	n.a.	n.a.
BG	Plovdiv Airport	SEB	n.a.	n.a.	n.a.	n.a.	n.a.
BG	Fraport Twin Star Airport Management AD Burgas	SEB	n.a.	n.a.	n.a.	n.a.	n.a.
BG	Fraport Twin Star Airport Management AD Varna	SEB	n.a.	n.a.	n.a.	n.a.	n.a.
CY	Hermes Airports	n.a.	n.a.	n.a.	n.a.	n.a.	no
CZ	Letiště Praha	SEB	n.a.	no	no	no	SP CR
DE	FMG – Flughafen München	no	n/a	yes	no	no	(VKA)
DK	CPH	SEB	n.a.	yes	no	yes	DI
DK	Billund Airport	SEB	n.a.	yes	no	yes	DI
DK	Aarhus Airport	SEB	n.a.	yes	no	yes	DI
EE	AS Tallinn Airport GH	no	n/a	yes	no	no	ELK
EL	HCAA	no	n/a	no	no	no	no
EL	Athens International Airport	SEB	n.a.	n.a.	n.a.	n.a.	n.a.
ES	AENA SME SA	SEB	n.a.	no	no	no	no
ES	Aeroports de Catalunya	SEB	n.a.	no	no	no	no
ES	Edeis SAS	no	n/a	no	no	no	no
ES	Acciona Airport Services	SEB	n.a.	no	no	no	ASEATA
FI	Finavia	SEB	24	n.a.	n.a.	n.a.	n.a.
FR	ADP	SEB	n.a.	yes	no	no	no
FR	Lyon-Saint Exupéry Airport	SEB	< 1	no	no	no	UAF
FR	Nice Côte d’Azur Airport	SEB	< 1	no	no	no	UAF
FR	Keolis Airports	SEB	n.a.	no	no	no	n.a.
FR	Vinci Airports	SEB	n.a.	no	no	no	FNAM, UAF
FR	Nantes Airport	SEB	< 1	no	no	no	UAF
HR	ZAG	SEB	20	no	no	no	no
HR	Split Airport	no	n/a	no	no	no	no
HR	Dubrovnik Airport	SEB	n.a.	no	no	no	no
HU	Budapest Airport	no	0	no	yes	no	MVVLSZ
IE	daa	SEB	50	no	no	no	no
IT	AdR	SEB	9	no	no	no	Assaeroporti
IT	SEA	SEB	6	no	no	no	Assaeroporti
IT	SAVE	SEB	6	no	no	no	Assaeroporti
LT	Lithuanian Airports	no	0	yes	no	no	no

Member State	Company	Collective bargaining (SEB or MEB)	% of ground handling staff covered	Consulted	Bipartite social dialogue	Tripartite social dialogue	National affiliation to employer organisation
LU	Luxembourg Airport	SEB	n.a.	n.a.	n.a.	n.a.	no
LV	Riga International Airport	SEB	n.a.	yes	no	no	LAA
MT	Malta International Airport	SEB	n.a.	yes	no	no	no
NL	Amsterdam Schiphol	SEB	n.a.	n.a.	yes	n.a.	no
NL	Eindhoven Airport	SEB	n.a.	n.a.	yes	n.a.	no
NL	Groningen Airport	SEB	< 1	no	yes	no	no
NL	Rotterdam The Hague Airport	SEB	n.a.	n.a.	yes	n.a.	no
PL	Krakow Airport	SEB	n.a.	n.a.	n.a.	n.a.	no
PT	ANA	SEB	25	n.a.	no	no	no
RO	SN AIT – TV SA	SEB	n.a.	no	no	no	AAR
RO	Bucharest Airport Otopeni	SEB	n.a.	n.a.	n.a.	n.a.	AAR
RO	Cluj International Airport	SEB	n.a.	n.a.	n.a.	n.a.	AAR
SE	Swedavia	no	0	n.a.	yes	yes	ALMEGA
SI	Fraport Slovenija	SEB	55	no	no	no	GZS, ZDS

Note: MEB, multi-employer bargaining; n.a., data not available; n/a, not applicable; SEB, single-employer bargaining. Ther affiliations mentioned between (..) indicate indirect affiliations.

Source: Network of Eurofound Correspondents, 2020

Table 108 indicates that there are 15 Member States where ACI Europe has an affiliated airport that is part of a national employer organisation. Among them are five employer organisations (see Table 107) that are involved in multi-employer collective bargaining related to airports or ground handling activities in the aviation sector.

Beyond these national employer organisations involved in collective bargaining on behalf of airports or ground handling employees, there are also a number of other national employer organisations listed in Chapter 2 that organise employers in these activities (Table 108). Among them, just one, Assaeroporti of Italy, is affiliated to ACI Europe.

Four others do not have any link to ACI Europe. There are, however, airports affiliated to ACI Europe that are also affiliated to WKÖ-FVALS in Austria, DI in Denmark, Palta in Finland and FNAM in France. For AGVL in Germany and Transportföretagen in Sweden, this is not the case.

Table 107: Collective bargaining coverage of national employer organisations involved in collective bargaining on behalf of airports or ground handling service providers (complete list in Table 108)

Member State	Employer organisation	Baggage-handling staff	Ticket desk, check-in and boarding staff	Airport security staff	Aircraft maintenance and overhaul	Airport fire services	Services to aircraft such as fuel, catering, de-icing and pushbacks	Consulted by government	Social dialogue body		Type of organisation	Representativeness of organisation	National affiliation
									Bipartite	Tripartite			
AT	WKÖ-FVALS	yes	yes	yes	yes	yes	yes	yes	no	yes	EO	yes	WKÖ
DE	AGVL	no	yes	no	yes	no	yes	yes	n.a.	n.a.	EO	yes	BDA
DK	DI	yes	yes	yes	yes	yes	yes	yes	no	no	EO	yes	DA
FI	Palta	yes	yes	yes	yes	no	yes	yes	yes	no	EO	yes	EK
FR	FNAM	yes	yes	no	yes	no	yes	yes	yes	no	EO	yes	MEDEF
IT	Assaereo	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	no	no	EO	yes	Confindustria
SE	Transportföretagen	yes	yes	yes	yes	no	yes	yes	yes	no	EO	yes	SN

Notes: EO, employer organisation. Transportföretagen of Sweden is directly affiliated to AIRE; all other employer organisations listed here are only indirectly linked, via an AIRE member airport that is affiliated both to AIRE and to this national employer organisation.

Source: Table 20 in Chapter 2

Table 108: All national employer organisations representing employers of airports or ground handling service providers

Member State	Employer organisation ⁶⁰	Collective bargaining involvement
AT	WKÖ-FVALS	MEB + SEB
BE	UPTR	MEB
BE	FEBETRA	MEB
BE	WF-BE	MEB
BG	ASB	n.a.
DE	AGVL	MEB + SEB
DE	ABL	MEB
DE	VKA	MEB
DE	BDLS	MEB
DK	DI	MEB
EL	AOFA	MEB
ES	ASEATA	MEB
FI	Palta	MEB + SEB
FR	FNAM	MEB

⁶⁰ In addition to the employer organisations listed in Table 103, the network of Eurofound correspondents has identified other sector-related employer or business organisations, such as ELK of Estonia, UAF of France, LAA of Latvia, APTTA of Portugal, AAR of Romania, ALA of Spain and Svenskt Flyg of Sweden. However, these organisations have not been included in this study, either because the sector-relatedness is questionable or there is no involvement in collective bargaining nor affiliation to any relevant European level social partner organisation

Member State	Employer organisation ⁶⁰	Collective bargaining involvement
FR	SAMERA	MEB
FR	SCARA	MEB
HU	MVVLSz	SEB
IT	Assaeroporti	MEB + SEB
IT	Federcatering	MEB + SEB
IT	Assohandlers	MEB
IT	FAIRO	MEB
NL	WPBL	MEB
PT	AESH	MEB
PT	RENA	MEB
SE	Transportföretagen	MEB
SE	Sobona	MEB
SE	ALMEGA	MEB
SK	UZvCL SR	MEB + SEB

Note: MEB, multi-employer bargaining; n.a., data not available; SEB, single-employer bargaining.

Source: Network of Eurofound Correspondents, 2020

Rather than national sectoral employer organisations, ACI Europe represents a number of groups that operate several airports. Fraport Greece, for example, operates 14 airports, Finavia operates 24 airports in Finland and ANA in Portugal operates 20 airports. These groups of airports can be considered functional equivalents of business associations or employer organisations, depending on their involvement in collective bargaining.

Table 109: ACI-affiliated airport groups in the EU27

Member State	Company operating several airports	Involvement in collective bargaining for more than one airport	Number of airports operated	Total number of airports in Member State	% of all airports in Member State
BG	Fraport Bourgas & Varna		2	5	40
CY	Hermes Airports		2	2	100
EL	HCAA		29	39	74
EL	Fraport Greece		14		36
ES	AENA		46	49	94
FI	Finavia			24	
FR	AdP			62	
FR	Keolis Airports				
FR	Vinci Airports				
IT	AdR		1	43	2
IT	SEA		2		5
IT	SAVE		2		5
LT	Lithuanian Airports		3	4	75

PT	ANA		10	20	50
9 Member States			111	248	45

Note: There is some indication that ADV, representing the German airports, and UAF, representing the French airports, are affiliated, but this information was not confirmed by our national correspondents.

Source: Network of Eurofound Correspondents, 2020

7.5.3. ACI Europe’s capacity to negotiate

ACI Europe was established in 1990 and has been part of the civil aviation ESSDC since its establishment in 2000. The ACI Europe secretariat totals 21 staff, of whom 1 is involved in ESSDC activities. ACI Europe has a website (www.aci-europe.org) with a members-only section, and more than 90% of its activities are financed from membership fees.

ACI Europe has no formalised standard procedure or capacity to negotiate agreements on behalf of its members. If a mandate is to be given, this is done on a case-by-case basis, with an ad hoc procedure. ACI Europe has no working group in which ESSDC matters are prepared or discussed that is independent from the ESSDC meetings. A final decision to adopt a joint text in the ESSDC is taken by ACI Europe management and signed by the director-general, normally without a mandate from or decision by any of the ACI Europe statutory bodies.

The ACI Europe statutes from 1991 make a distinction between regular members and associate members. Regular members are owners or operators of one or more civil airports with a scheduled or permanent commercial service, and primarily responsible for management operations and setting policy for the entire airside and/or terminal building operations. Associate members are owners or operators of one or more civil airports without a scheduled or permanent commercial service. All the ACI Europe-affiliated airports listed in Table 103 are regular members.

Table 110: List of airports identified by the European Commission in 2019, with ACI members highlighted in green

	Airports whose annual traffic was more than two million passenger movements or 50,000 tonnes of freight in 2018			Smaller airports			
Member State	Number	Names	Number affiliated to ACI	Number	Names	Number affiliated to ACI	% of all airports represented by ACI
AT	1	Vienna International	1	5	Graz, Klagenfurt, Linz, Salzburg, Innsbruck	5	100
BE	3	Brussels, Brussels South Charleroi, Liège	3	3	Antwerp International, Kortrijk-Wevelgem, Ostend-Bruges	1	67
BG	3	Sofia, Burgas, Varna	3	2	Plovdiv, Gorna Oryahovitsa	1	80
CY	2	Larnaca International Airport, Paphos International Airport Both Larnaca and Paphos airports are managed by Hermes Airports	2	0	0	0	100
CZ	1	Prague	1	72	Benešov, Brno-Tuřany, Broumov, Břeclav, Bubovice, Česká Lípa, České Budějovice, Dvůr Králové, Frýdlant, Havlíčkův Brod, Hodkovice, Hořice, Hosín, Hradec Králové, Hranice, Cheb, Chomutov, Chotěboř, Chrudim, Jaroměř, Jičín,	4	7

		Dortmund, Düsseldorf, Frankfurt (Fraport), Hahn, Hamburg, Hannover, Cologne Bonn, Leipzig/Halle, Munich, Nuremberg, Stuttgart			Cuxhaven-Nordholz, Dresden, Eggenfelden, Erfurt- Weimar, Friedrichshafen, Harle, Heide- Büsum, Heligoland, Heringsdorf, Ingolstadt Manching, Juist, Karlsruhe/Baden- Baden, Kassel, Mannheim City, Memmingen, Münster Osnabrück, Norden-Norddeich, Paderborn Lippstadt, Rostock- Laage, Saarbrücken, Sylt, Wangerooge, Weeze		
DK	2	Copenhagen, Billund	2	7	Aalborg, Aarhus, Bornholm, Midtjyllands, Esbjerg, Sønderborg, Roskilde	1	33
EE	1	Tallinn	1	4	Tartu, Pärnu, Kuressaare, Kärdla	0	20
EL	8	Athens International, Heraklion, Thessaloniki, Rhodes, Corfu, Chania, Kos, Santorini	8	31	Zakynthos, Mykonos, Kefalonia, Aktion, Mytilene, Samos, Skiathos, Kavala, Kalamata, Karpathos, Chios, Alexandroupolis,	31	100

					<p>Paros, Araxos, Ioannina, Lemnos, Naxos, Milos, Sitia, Icaria, Nea Anchialos, Kithira, Leros, Skyros, Syros, Astypalaia, Kalymnos, Kastellorizo, Kozani, Kastoria, Kasos</p> <p>HCAA manages 29 Greek airports Fraport manages 14 Greek airports – among which Thessaloniki, Rhodes, Corfu, Chania, Kos and Santorini</p>		
ES	19	<p>Madrid–Barajas, Alicante–Elche, Barcelona–El Prat, Bilbao, Fuerteventura, Girona, Gran Canaria, Ibiza, Lanzarote, Málaga–Costa del Sol, Menorca, Palma de Mallorca, Santiago, Seville, Tenerife Norte, Tenerife Sur, Valencia, Vitoria, Zaragoza</p> <p>AENA manages 46 airports and 2 heliports</p>	d19	31	<p>A Coruña, Albacete, Algeciras Heliport, Almería, Asturias, Badajoz, Burgos, Castellón–Costa Azahar, Ceuta Heliport, Córdoba, El Hierro, Granada–Jaén, Huesca–Pirineos, Jerez, La Gomera, La Palma, León, Lleida–Alguaire, Logroño–Agoncillo, Madrid–Cuatro Vientos, Melilla, Región de Murcia</p>	29	

					International, Pamplona, Reus, Sabadell, Salamanca, San Sebastián, Seve Ballesteros–Santander, Son Bonet, Valladolid, Vigo Aeroports de Catalunya operates Lleida–Alguaire and Andorra airports Edeis SAS (not included on website) Acciona Airport Services (not included on website)		
FI	1	Helsinki-Vantaa	1	23	Enontekiö, Halli, Ivalo, Joensuu, Jyväskylä, Kajaani, Kemi-Tornio, Kittilä, Kokkola-Pietarsaari, Kuopio, Kuusamo, Lappeenranta, Mariehamn, Mikkeli, Oulu, Pori, Rovaniemi, Savonlinna, Seinäjoki, Tampere-Pirkkala, Turku, Utti, Vaasa	21	92

FR	13	<p>Paris Charles de Gaulle, Paris Orly, Nice Côte d'Azur, Lyon-Saint Exupéry, Toulouse- Blagnac, Marseille Provence, Basel Mulhouse Freiburg, Bordeaux-Mérignac, Nantes Atlantique, Beauvais-Tillé, La Réunion Roland Garros, Pointe-à-Pitre Le Raizet, Lille-Lesquin ADP operates Paris Charles de Gaulle and Orly and Paris-Le Bourget Keolis Airport Vinci Airports operates 11 airports in France, 10 in Portugal and Stockholm Airport in Sweden</p>	6	73(of which 48 with more than 10.000 passengers)	<p>Albert Picardie, Avignon Provence, Béziers Cap d'Agde, Châteauroux- Centre, Lyon-Bron, Cannes Mandelieu, La Môle St Tropez Airport Angers-Loire, Angoulême Cognac, Auxerre Branches, Bourges, Chalon Champforgueil, Cherbourg Maupertus, Dijon Bourgogne, Le Havre Octeville, Reims Prunay, Toulouse Francazal, Troyes Barberey, Vannes, Rennes Bretagne,, Chambéry Savoie Mont Blanc, Pays d'Ancenis, Orléans</p>	24	35
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					Loire Valley, Martinique Aimé Césaire, Montpellier- Méditerranée, Ajaccio Napoleon Bonaparte, Bastia Poretta, Strasbourg, Biarritz Pays Basque, Brest Bretagne, Rennes- Saint-Jacques, Figari-Sud Corse, Pau Pyrénées, Toulon-Hyères, Cayenne Félix- Éboué, Perpignan- Rivesaltes, Tarbes- Lourdes-Pyrénées, Clermont-Ferrand Auvergne, Carcassonne- Salvaza, Dzaoudzi- Pamandzi, Grenoble Alpes Isère, Calvi Sainte Catherine, Limoges-		
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					Bellegarde, Bergerac- Dordogne- Périgord, Caen- Carpiquet, Metz- Nancy-Lorraine, La Rochelle-Ile de Ré, Nîmes-Garons, Saint-Martin- Grand Case, Tours Val de Loire, Deauville- Normandie, Saint Barthélemy, Paris- Le Bourget, Lorient-Lann- Bihoué, Poitiers Biard, Dinard- Pleurtuit-St-Malo, Dole-Tavaux, Pierrefonds, Rodez-Aveyron, Quimper Cornouaille, Brive- Souillac, Châlons- Vatry, Castres- Mazamet, Maripasoula, Saint-Pierre-		
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					Pointe Blanche, Aurillac, Agen-La Garenne, Rouen Vallée de Seine, Saint-Nazaire Montoir		
HR	3	Zagreb, Split, Dubrovnik	3	6	Zadar, Pula, Osijek, Brač, Rijeka, Lošinj	0	33
HU	1	Budapest International	1	6	Pécs-Pogány, Győr- Pér, Hévíz-Balaton, Debrecen, Szeged, Nyíregyháza	0	14
IE	2	Dublin (DAA), Cork	1	5	Shannon (SAA), Ireland West Airport Knock, Kerry, Donegal, Waterford	3	57
IT	d	Rome-Fiumicino (ADR), Milan Malpensa (SEA), Bergamo, Venice (SAVE), Naples, Catania, Milan Linate (SEA), Bologna, Palermo, Rome Ciampino, Pisa, Bari, Cagliari, Turin, Verona, Treviso (SAVE), Olbia, Lamezia Terme, Florence, Brindisi	5	22	Genoa, Alghero, Trieste, Pescara Abruzzo Airport,, Trapani, Ancona, Comiso, Reggio Calabria, Rimini, Lampedusa, Perugia, Pantelleria, Cuneo, Crotone, Parma, Bolzano, Grosseto, Brescia, Marina di Campo, Salerno, Taranto, Foggia	0	12
LT	1	Vilnius International Lithuanian Airports operates Vilnius, Kaunas and Palanga	1	3	Kaunas International, Palanga International, Šiauliai International	2	80

LU	1	Luxembourg	1	0	0	0	100
LV	1	Riga International	1	1	Liepaja International	0	50
MT	1	Luqa-Malta International Airport	1	0	0	0	100
NL	3	Amsterdam Schiphol, Eindhoven, Maastricht Aachen	2	2	Groningen, Rotterdam The Hague	2	80
PL	7	Warsaw Chopin, Kraków, Gdańsk Lech Wałęsa, Katowice-Pyrzowice, Warsaw Modlin, Wrocław-Strachowice, Poznań-Ławica	1	7	Rzeszów-Jasionka, Szczecin-Goleniów, Bydgoszcz-Szwederowo, Łódź, Lublin, Zielona Góra, Olsztyn-Mazury	0	7
PT	4	Lisbon, Porto, Faro, Madeira ANA operates 10 airports in Portugal	4	16	Beja, Bragança, Cascais, Corvo, Flores, Graciosa, Horta, Lajes, Pico, Ponta Delgada, Portimão, Porto Santo, Santa Maria, São Jorge, Vila Real, Viseu	6	50
RO	2	Bucharest Airport Otopeni, Cluj International Airport	2	15	Aurel Vlaicu International, Craiova International, Airport Timișoara Traian Vuia International, Arad International, Oradea International, Baia Mare International, Satu Mare International, Sibiu	0	12

					International, Târgu Mureș International, Suceava International, Iași International, George Enescu International, Tulcea, Mihail Kogălniceanu Constanța International, Tuzla		
SE	5	Stockholm Arlanda, Gothenburg Landvetter, Stockholm Bromma, Stockholm Skavsta, Malmö	4	39	Luleå Kallax, Umeå, Åre Östersund, Visby, Skellefteå, Ängelholm Helsingborg, Växjö- Kronoberg, Kiruna, Sundsvall-Timrå, Kalmar, Ronneby, Linköping/Saab, Halmstad, Norrköping, Stockholm Västerås, Jönköping, Örnköldsvik, Örebro, Karlstad, Arvidsjaur, Trollhättan- Vänersborg, Kristianstad, Borlänge, Gällivare, Lycksele, Vilhelmina, Hemavan Tärnaby, Kramfors-Sollefteå, Sveg, Pajala, Mora-	32	97

					Siljan, Hagfors, Torsby Eskilstuna, Falköping, Ljungbyhed, Skövde, Storuman		
SI	0	0	0	3	Ljubljana Jože Pučnik, Maribor Edvard Rusjan, Portorož Fraport Slovenija operates Ljubljana Jože Pučnik Airport	2	67
SK	1	Bratislava	0	5	Košice, Poprad-Tatry, Sliač, Piešťany, Žilina	1	17
Total number of airports in EU27	119 large airports	76 affiliated large airports (64%)		407* smaller airports	165 affiliated smaller airports (41%)		46%
Number of Member States with an affiliated airport in each size group		25 of 25 MS In 18 MS all large airports are affiliated			In 16 of 24 MS In 3 MS all small airports are affiliated		In All 27 MS there are airports affiliated In 2 Member States all large and all small airports are affiliated

Note: * Airports with annual traffic under 10,000 passengers have not been taken into account in France and Germany. The airports marked in green are the ones for which the affiliation to ACI Europe was confirmed in the scope of this study; regarding the airports marked in yellow, there is unclarity regarding their affiliation. The blue cells indicate the Member States for which all airports of the given size group are affiliated to ACI Europe

Source: European Commission Communication (2019/C336/02) and authors' own calculations

7.6. Airport Services Association

ASA represents ground service providers in airports, with a focus on baggage handling for both passenger and freight air transport.

7.6.1. ASA membership domain and composition

ASA covers several companies that provide ground handling services. Because some of the companies, such as Swissport and WFS, are active in a large number of Member States, ASA manages to have some presence in 21 Member States through its affiliated companies (Table 111). ASA was previously called IAHA, founded in 1974. It became ASA in 2011.

Table 111: Companies affiliated to ASA in the EU27

Member State	Companies affiliated to ASA operating in this Member State	Number
AT	Celebi Aviation Holding, WFS	2
BE	Swissport, WFS	2
BG	Aviation Services Bulgaria, Goldair Handling	2
CY	LGS Handling (Louis Group & Goldair), Swissport	2
CZ	Menzies	1
DE	Acciona Airport Services, Celebi, Havaş Ground Handling, Wisag Aviation Holding, WFS	5
DK	WFS	0
EE	AD Tallinn Airport	1
EL	Goldair Handling, Swissport	2
ES	Acciona Airport Services, Swissport, WFS	3
FI	Swissport	1
FR	Swissport, WFS, Deolan	3
HR		0
HU	Celebi	1
IE	WFS	1
IT	WFS	1
LT		0
LU		0
LV	Havaş Ground Handling	1
MT	Aviaserve	1
NL	Menzies, Swissport, WFS	3
PL	Welcome Airport Services	1
PT	Portway	1
RO	Menzies	1
SE	WFS	1
SI		
SK		
	There is some indication that Menzies is also active in CY, DK, DE, ES, EL, FR, HU, IT, PL, PT and SE, but this information has not been confirmed – ASA reported that DNATA operates in IT and NL, and Swissport also in AT, DE, DK, IE, RO.	

Sources: Network of Eurofound Correspondents, 2020, ASA

Table 112: Three largest ground service employers in each Member State

Member State	Total number of companies (2018, SBS)	ASA member companies	Largest employers of ground staff		
			Largest	Second largest	Third largest
AT	63	2	Vienna International Airport	Salzburg Airport	Graz Airport
BE	196	2	SGS Belgium	General Services Antwerp	Lineas Group
BG	81	2	Sofia Airport	Burgas Airport	Varna Airport
CY	14	2	Swissport Cyprus	LGS Handling	Hermes Airports
CZ	71	1	Letiště Praha	Czech Airlines Technics, a.s.	Menzies Aviation (Czech) s.r.o.
DE	642	4	Lufthansa	Fra Sec	AeroGround
DK	82	0	SAS Ground Handling	Aviator Services	Skyways Technics
EE	11	2	AS Tallinna Lennujaam (Tallinn Airport)	AS Tallinn Airport Ground handling	Lennuliiklusteeninduse AS (air traffic management)
EL	42	2	Goldair	Skysery	Swissport
ES	413	3	Iberia Airport Services	Groundforce	Swissport
FI	71	1	Finnair	Finavia	Swissport Finland Oy
FR	238	3	Groupe Air France	Groupe ADP	ServAir
HR	28	0	Croatia Airlines	Zagreb Airport	Split Airport
HU	126	1	Budapest Airport (BUD) Group	Celebi Ground Handling Hungary Kft.	Aeroplex
IE	436	1	Daa plc	Aer Lingus	Ryanair
IT	295	1	Alitalia	Aeroporti di Roma	Sky fly Napoli
LT	18	0	FL Technics	Lithuanian Airports, VĮ	Litcargus
LU	5	0	Luxair	Luxembourg Airport	ANA
LV	44	1	Riga International Airport	Havas Latvia SIA	AVIASABIEDRĪBA LIEPĀJA SIA
MT	n.a.	1	Air Malta	Malta International Airport	Aviaserve
NL	426	3	KLM (airline)	Swissport	Dnata BV
PL	1,169	1	LS Airport Services S. A.	Welcome Airport Services sp z o.o.	Polskie Porty Lotnicze (PPL) /Polish Airports
PT	64	1	TAP	Groundforce	Portway
RO	66	1	Compania Națională Aeroporturi București (Otopeni)	Globe Ground Romania SRL	Cluj Airport
SE	141	1	SAS	Swedavia	Aviator airport service
SI	45	0	Fraport Slovenija	Portorož Airport	Maribor Edvard Rusjan Airport'
SK	39	0	Letisko M. R. Štefánika – Airport Bratislava, a.s. (BTS)	Air Navigation Services Provider	Letisko Poprad-Tatry, a.s.

Notes: Green cells indicate companies affiliated to ASA; companies in bold print are airports; companies in red are airlines; blue font refers to Swissport, a company that appears several times among the largest employers.

Sources: Network of Eurofound Correspondents, 2020, ASA, Eurostat, SBS

Table 112 lists how many ground handling services there are in each of the Member States (based on SBS Eurostat data), and the three largest employers in ground handling services in each country. Green cells indicate companies affiliated to ASA. The largest ground service providers in Cyprus, Estonia and Greece are affiliated to ASA. The second-largest employer of ground service employees is represented by ASA in Cyprus, Estonia, Hungary, Latvia, the Netherlands and Poland. And the third-largest employer is represented by ASA in Czechia, Greece, Spain, Finland, Malta, the Netherlands and Portugal.

Almost all the ASA member companies are only affiliated to ASA. Acciona Airport Services of Spain is the only exception; it is also affiliated to ACI Europe.

ASA positions itself primarily as a trade association for the independent ground and air cargo handling industry worldwide, including activities such as check-in and boarding, fuelling, towing and de-icing. The different types of ground service activities in which ASA-affiliated companies are employing staff are indicated in green in Table 113.

ASA makes a distinction between full members and associate members. Full membership is reserved for ground service providers, and all companies listed in Tables 111 and 112 are full ASA members. Associate membership is for ground service support companies. These include Trepel Airport Equipment, TLD Group, Sage Parts and Cobus Industries. These companies are mainly active in the maintenance of aircraft. Cobus Industries produces shuttle buses for passenger transport within airports.

Due to the COVID-19 crisis in the aviation sector, ASA has lost a number of long-term member companies but it has also gained members, mostly associate members.

7.6.2. ASA member companies in the social partner landscape

ASA has member companies involved in collective bargaining in Cyprus, the Netherlands, Portugal and Spain. In Greece and in Malta, ASA has member companies that are consulted by the government on sector-related matters. The affiliated companies from Cyprus and the Netherlands report involvement in bipartite social dialogue structures, probably in works councils in those companies. In Estonia, the Netherlands and Spain, ASA-affiliated companies participate in national sectoral employer organisations.

Table 113: Involvement of ASA member companies in collective bargaining, social dialogue and employer organisations

Member State	Company	% of sectoral workforce	Baggage-handling staff	Ticket desk, check-in and boarding	Airport security	Maintenance and overhaul	Airport fire services	Services to aircraft such as fuel, catering, de-icing and pushbacks	Other	Collective bargaining (SEB or MEB)	% of ground handling staff covered	Consulted	Bipartite social dialogue	Tripartite social dialogue	National affiliation to employer organisation
CY	LGS Handling	32	350	250	2	4	0	16	128	SEB	38	no	yes	no	no
EE	Tallinn Airport	20	69	113	0	0	0	40	77	no		no	no	no	ELK
ES	Acciona Airport Services		385	164	0	0	0	0	851	SEB		no	no	no	ASEATA
EL	Goldair Handling									SEB		yes			no
FR	WFS	< 1			0		0	0	0	n.a.		no	no	no	n.a.
MT	Aviaserve											yes	no	no	no
NL	Swissport				0		0			SEB			yes		WPBL
NL	Dnata									SEB			yes		no
NL	Menzies									SEB			yes		WPBL
PL	Welcome Airport Services									no	0				no
PT	Portway	8	579	514	1	0	0	112	748	SEB	15	no	no	no	no

Note: MEB, multi-employer bargaining; n.a., data not available; SEB, single-employer bargaining.

Source: Network of Eurofound Correspondents, 2020

7.6.3. ASA's autonomy and capacity to negotiate

ASA was established in 2011, a restructuring of IAHA. IAHA had participated in the Aviation ESSDC up to 2011, and its successor ASA only joined the ESSDC in 2018. There were, however, no ESSDC joint texts related to ground service employees in the period from 2011 to 2017.

ASA has a secretariat in Brussels with one staff member. The director-general of ASA is also the managing director of the ACA. This clarifies why one of the texts of the aviation ESSDC is co-signed by the ACA. For more information on the ACA, including the affiliated companies, refer to its website (www.aca.catering). Except for the sharing of the single staff member, there is no further link between ASA and ACA.

ASA is fully financed by membership fees. It has a website (www.asaworld.aero) with a members-only section for the internal exchange of information and minutes of meetings. ASA reports a capacity to negotiate agreements but has no standard formal mandating procedure and also no ad hoc procedure for mandating or decision-making with regard to ESSDC texts. As the statutes do not provide any guidance about this, and in the absence of rules of procedures, it assesses how to deal with European sectoral social dialogue initiatives or texts case by case.

The ASA member companies approve the secretariat's involvement in the collective work with the other social partners in the aviation ESSDC, and expect regular dialogue on ESSDC initiatives. ASA does not have a specific working group dedicated to social matters. Resources are allocated based on what is required for any particular initiative. It is the director-general who signs off on texts in the ESSDC on behalf of ASA.

ASA's objective is to be recognised and consulted as the voice of air cargo and ground handling companies worldwide, together and in close cooperation with IATA, ICAO and ACI. Moreover, it seeks to represent the collective interests of its members in the European sectoral social dialogue and vis-à-vis the European and national authorities. ASA's general assembly of members is seen as the ultimate authority of the organisation, and there is also an executive board, which manages the organisation.⁶¹

7.7. Civil Air Navigation Services Organisation in Europe

CANSO represents the ANSPs, the employers of ATCOs, ATSEP and other ATM employees. CANSO is organised by geographical regions: Africa, Asia Pacific, Europe, Latin America and the Caribbean, and the Middle East. CANSO Europe leads CANSO's activities – including ESSDC activities – in the European region.

7.7.1. CANSO Europe's membership domain and composition

CANSO Europe represents ANSPs in 25 Member States. The ANSPs in Cyprus and Greece are not affiliated to CANSO Europe. The ANSP of Cyprus is affiliated to CANSO Global but not to CANSO Europe, while the ANSP of Greece is not affiliated to CANSO Europe or to CANSO Global.

Among ANSP employees are ATCOs, ATSEP and other ATM staff. The national ANSPs affiliated to CANSO operate as employers of these three professional groups. Because many aircraft move through European airspace simultaneously, ATM is crucial to ensure safe and efficient flows of traffic. At global level, the Chicago convention of 1944 regulates how each state is to provide ATM services in its airspace, which is governed by ICAO.⁶² Within the EU, Member States are responsible for organising and controlling their airspace. The

⁶¹ More information is available at <https://www.asaworld.aero/>

⁶² According to ICAO, states are not obliged to perform airspace services. Article 28 of the Chicago Convention only states that if they do provide air navigation they have to adhere to certain rules:

network manager plays an important role in supporting and coordinating with ANSPs, and other operational stakeholders, actions to improve the capacity and the performance of European airspace.⁶³ EASA is the EU agency responsible for drafting and advising ATM/air navigation service regulations to the European Commission, including on the design of airspace structures and the requirements for the providers of airspace management.

CANSO Europe has an affiliated ANSP in 25 Member States. ANSPs employ all ATCOs, ATSEP and other ATM staff in 17 Member States. In France, Germany, Hungary, Italy and Portugal, the figure is nearly 100%, and in Spain the ANSP affiliated to CANSO employs more than half of such staff in the country (a first estimate was that this would be 75%, but, as there are other ANSPs in Spain, this could not be confirmed – although saying it is more than 50% is certainly true).

Table 114: Percentage of the national ATM workforce employed by ANSPs in EU27

Category	Member States	Number
Member States where the ANSP affiliated to CANSO employs 100% of the ATM staff	AT, BE, CZ, DK, FI, HR, IE, , LT, LV, MT, NL, PL, RO, SE, SI, SK	17
Member States where the ANSP affiliated to CANSO employs almost 100% of ATM staff	DE, ⁶⁴ FR, HU, ⁶⁵ IT, PT	4
Member States for which the proportion of ATM staff employed by the ANSP affiliated to CANSO Europe is not known	BG, EE, ES (75%), LU	4
Member State for which the ANSP is not affiliated to CANSO Europe	CY, EL (The ANSP from CY is affiliated to CANSO Global but not to CANSO Europe)	2

Source: Table 11

Some ANSPs are government departments (purely public), such as in France, Greece and Luxembourg. In other Member States, the ANSP is a public enterprise or autonomous government agency, as in Belgium, the Netherlands, Spain and Sweden. ANSPs are entirely private or corporate entities in Austria, Croatia, Estonia,

State sovereignty is closely connected to the definition of States' obligations under Article 28 of the Chicago Convention. The text and spirit of Article 28 do not oblige States to provide air navigation services over their territory themselves. Rather, Article 28 prescribes that when and where States elect to provide facilities and services to support international air navigation, these facilities and services must comply with ICAO Standards and Recommended Practices.

(ICAO, 2013)

⁶³ Eurocontrol has been appointed by the European Commission to be the network manager until 2029.

⁶⁴ In Germany the ATC in various regional aerodromes is provided locally and not by the DFS, the ANSP affiliated to CANSO.

⁶⁵ In Hungary, there are different flight information service providers in smaller local regional airports. We have no information about the number of people they employ. HungaroControl employs the vast majority of ATM staff (almost 100%). ATC staff are employed only by HungaroControl.

Germany, Ireland and Italy. The liberalisation of ANSPs was meant to help them to adapt, innovate and expand into new markets, to work collaboratively, and to secure rewards for better serving airline customers at competitive prices (ICAO, 2008; ATM Policy Institute, 2016). In the context of this liberalisation, ANSPs can compete to offer terminal air navigation services at a specific airport through a tender process. Exclusive contracts for tower services are offered for a fixed period. Because of this, in a given Member State, there is a small proportion of the ATM workforce that is employed not directly by the ANSP, but locally by a regional airport, as in Germany and Hungary (see footnotes to Table 114).

Table 115: Largest ATM provider in each Member State, numbers and % of ATM employees

Member State	Largest ATM provider	Number of ATM/air navigation service employees employed by this provider	% of all the country's ATM employees employed by this provider	Number of ATC employees employed by this provider	Number of ATSEP employed by this provider	Number of other ATM staff employed by this provider
AT	Austro Control	1,117	100	337	153	627
BE	Skeyes	872	100	872	0	0
BG	BULATSA	1,121	0	311	309	501
CY	DCA (Ministry of Transport)	223	100	175	48	58
CZ	ANS CR	938	100	276	123	539
DE	DFS	5,400	Almost 100	2,621	414	2,402
DK	Navair	630	100	270	6	354
EE	EANS	225	0	104	36	51
EL	HCAA	2,052	0	620	407	0
ES	ENAIRES	4,011	50–75	1,968	818	1,225
FI	ANS Finland	319	100	231	58	30
FR	DGAC	7,354	Almost 100	3,469	1,321	2,564
HR	Croatia Control	279	100	279	121	353
HU	HungaroControl	783	Almost 100	183	117	483
IE	IAA	650	100	300	50	300
IT	ENAV	3,295	n.a. ⁶⁶ Almost 100	1,693	486 ⁶⁷	1,602
LT	Oro Navigacija	291	100	0	0	0
LU	ANA		0	0	0	0
LV	LGS	362	100	77	59	226
MT	MATS	160	100	53	50	52
NL	LVNL	915	100	400	0	0
PL	PANSA	1,879	100	612	226	1,041
PT	NAV	965	Almost 100	350	130	485
RO	ROMATSA	1,700	100	744	471	353
SE	LFV	982	100	500	200	282
SI	Slovenia Control	226	100	100	35	91
SK	LPS	116	100	116	n.a.	10

⁶⁶ In Italy, the ATM employees also include personnel employed by the Italian Air Force, smaller airports providing flight information services and other companies providing ATM-related services on the market.

⁶⁷ In Italy, most of the ATSEP are employed by Techno Sky, company owned by ENAV that provides maintenance services.

Member State	Largest ATM provider	Number of ATM/air navigation service employees employed by this provider	% of all the country's ATM employees employed by this provider	Number of ATC employees employed by this provider	Number of ATSEP employed by this provider	Number of other ATM staff employed by this provider	
EU27	Totals based on incomplete data		36,865		16,661	5,638	13,629

Notes: *n.a.*, data not available. Blue cells indicate Member States in which 100% of ATCO and ATM employees in the country are employed by this ANSP. All of these ANSPs are affiliated to CANSO.

Sources: For Austria, Belgium, Bulgaria, Czechia, France, Hungary, Italy and Poland, CANSO, 2022 (with data for December 2021); for all other Member States, Network of Eurofound Correspondents, 2020, with data from December 2019.

Almost all these ANSPs are active only in ATM activities. The two exceptions are HCAA in Greece and Oro Navigacija in Lithuania, which also employ other ground service staff. This is probably why HCAA is also affiliated to ACI Europe. The Lithuanian ANSP is affiliated to CANSO Europe; the Greek ANSP is not. The ANSP in Cyprus is affiliated to CANSO Global but not to CANSO Europe. All other ANSPs are represented only by CANSO in the ESSDC.

CANSO Europe has exactly one affiliate in each of 25 EU Member States. In The membership domain of almost all CANSO Europe members is confined to air traffic control and other ATM, due to the highly responsible and clearly delineated task with which the ANSPs are entrusted. Likewise, affiliations to European organisations other than CANSO Europe are rare. All national affiliates except in Finland, Luxembourg and Sweden engage in single-employer bargaining, which indicates a high level of commitment to a strong social dialogue on the two sides of industry – between the ANSPs and labour representatives able to get the employer to the bargaining table. In the few countries without bargaining (Finland, Luxembourg and Sweden), the respective ANSPs form part of the public administration sector (or are governed by public law), which impedes collective bargaining.

7.7.2. CANSO Europe members in the national social partner landscape

In 23 Member States, the CANSO Europe-affiliated ANSP is directly involved as an employer in single-employer bargaining. In Sweden it is not the ANSP but the employer organisation to which LPS is affiliated, Arbetsgivarverket SAGE, that does the collective bargaining at sector level. The CANSO Europe member in Sweden is thus indirectly involved in collective bargaining. In Luxembourg there is no ANSP involvement in collective bargaining for ATM staff.

In 11 Member States, the CANSO Europe affiliate takes part in collective bargaining covering 100% of ATM staff, including all ATCOs, ATSEP and other ATM employees. This is the case in Bulgaria, France, Hungary, Italy, Latvia, Lithuania, the Netherlands, Portugal, Romania, Slovenia and Spain (see Table 116). In Cyprus,⁶⁸ Czechia and Slovakia, there is no collective bargaining for ATCOs; only the ATSEP and other ATM employees are covered by collective bargaining. In Denmark and Ireland, some management employees are not covered by collective bargaining, bringing the collective bargaining level to around 90% for all ATM staff.

⁶⁸ In Cyprus only ATSEP take part in collective bargaining, as part of the telecom organisation CYTA. ATCOs and other ATM staff are civil servants and as such their working conditions are regulated by law. Some social dialogue takes place with the DCA as employer, but not to the extent of collective bargaining.

The integration in the social partner setting of the country benefits from mutual recognition and common involvement in bipartite or tripartite social dialogue bodies. ANSPs affiliated to CANSO Europe are involved in such national social dialogue structures in Austria, Bulgaria, Cyprus, Denmark, Hungary, the Netherlands and Sweden. In 11 Member States the ANSP is consulted by the national government on sector-related matters.

In 10 Member States the ANSP affiliated to CANSO Europe participates in a sectoral employer organisation at national level. In Belgium, Bulgaria, Italy, Slovenia and Sweden, this membership in a sectoral employer organisation also implies involvement in multi-employer collective bargaining.

Table 116: Participation of CANSO Europe members in the national social partner setting in their country

Member State	ANSP affiliated to CANSO	Collective bargaining involvement	% of ATM employees covered	Consultation by authorities	Participation in social dialogue bodies	Affiliation to employer organisations
AT	Austro Control	SEB	n.a.	yes	yes	
BE	Skeyes	MEB + SEB	n.a.	no	no	FEBETRA
BG	BULATSA	MEB + SEB	100	no	yes	
CZ	ANS CR	SEB	34 (ATM and ATSEP)	no	no	
DE	DFS	SEB	>50	yes	no	
DK	Naviair	SEB	>50	yes	yes	DI
EE	EANS	SEB	n.a.	no	no	ELK
ES	ENAIRES	MEB + SEB	100	yes	no	
FI	ANS Finland	SEB	n.a.	no	no	Palta
FR	DGAC	SEB	100	yes	no	
HR	Croatia Control	SEB	n.a.	no	no	
HU	Hungaro-Control	SEB	100	yes	yes	MVVLSZ
IE	IAA	SEB	90	no	no	
IT	ENAV	MEB + SEB	100	n.a.	no	Assocontrol
LT	Oro Navigacija	SEB	100	yes	no	
LU	ANA	no	0	yes	no	
LV	LGS	SEB	100	no	no	LAA
MT	MATS	SEB	4 separate agreements 100	yes	no	
NL	LVNL	SEB	100	yes	yes	
PL	PANSA	SEB	n.a.	n.a.	n.a.	
PT	NAV	SEB	100	no	no	
RO	ROMATSA	SEB	100	no	no	AAR
SE	LFV	MEB	n.a.	yes	yes	Arbetsgivarverket SAGE
SI	Slovenia Control	MEB + SEB	100	no	no	n.a.
SK	LPS	SEB	ATM and ATSEP	no	no	UZvCL SR

EU27	SEB in 23 Member States Only MEB in SE No collective bargaining in EL,LU No Canso Europe member in CY and EL	100% in 12 MS >50% in 3 other MS	11 Member States	6 Member States	10 Member States
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Notes: MEB, multi-employer bargaining; n.a., data not available; SEB, single-employer bargaining. The purple cells indicate collective bargaining with the involvement of a CANSO Europe affiliate. The blue cells indicate where this collective bargaining is covering 100% of the ATM employees in the country. The grey cells indicate where there is a CANSO Europe member involved in social dialogue at national level.

Source: Network of Eurofound Correspondents, 2019–2021

7.7.3. CANSO Europe’s autonomy and capacity to negotiate

CANSO was established in 1996 at its general assembly in Vancouver, Canada. It is the global voice of ATM worldwide and claims to support, through its members, over 90% of world air traffic. CANSO represents the interests of ANSPs to a wide range of aviation stakeholders, including European and national authorities as well as the ICAO and Eurocontrol. Full membership is open to all ANSPs regardless of their legal status, including those that are integrated into government structures and departments.

The organisation’s objectives are to promote safe, efficient and cost-effective navigation services, to develop common industry positions and to support its members in the provision of services. Liaison with other transport industry stakeholders, such as airlines, industry suppliers and airports, is of utmost importance to provide safe and efficient navigation services. Moreover, CANSO seeks to represent the views and interests of members to the relevant international bodies, including interest representation within the framework of the European sectoral social dialogue. In 2021, CANSO launched a new strategic direction and visual identity. The new strapline ‘shaping our future skies’ recognises the role that CANSO and its members, as well as other ANSPs and industry suppliers, play in delivering integrated, sustainable and efficient air transport.

CANSO Europe has an office in Brussels, through which it is actively involved in EU activities and developments. The global umbrella organisation of CANSO has its office at Amsterdam Schiphol. Worldwide, CANSO has 23 staff members. For the European region, CANSO has an office in Brussels with four staff members. Of them, two are regularly involved in the activities of the aviation ESSDC. About 95% of CANSO activities are financed by membership fees. Only a very small percentage of its activities is financed through EU-funded projects. CANSO’s website (<https://canso.org/>) includes a members-only section, allowing for internal exchange of documents among the affiliates.

CANSO Europe states that it has the capacity to negotiate agreements on behalf of its members and has a standard mandating procedure for this. There is, however, no formalised procedure in the CANSO statutes or in any other document stipulating how to take decisions on joint opinions in the ESSDC or on European social partner agreements. There is also no ad hoc procedure for this. Its capacity to negotiate depends on a case-by-case assessment of how to deal with different ESSDC initiatives or texts.

CANSO Europe represents its members in ESSDC forums and activities. However, CANSO Europe has no mandate to conclude binding agreements, and it can only hold particular positions on behalf of its members with prior consultation and agreement. There is a clear process within CANSO Europe’s organisational structure on the discussion of social dialogue activities. In the past, CANSO Europe, together with the social partners, developed guidance material and joint statements on social dialogue-related subjects.

7.8. National employer organisations not represented on the ESSDC

Table 117 indicates that only 5 of the 36 employer organisations active in the sector in three countries (Bulgaria, Italy and Sweden) are affiliated to one of the European-level employer organisations. This means that the vast majority (31) of sector-related employer organisations in 14 Member States are not affiliated to ENAA, AIRE, ERA, A4D, CANSO, ACI or ASA. This is because the European organisations in civil aviation mainly rely on direct company membership rather than affiliations to employer organisations.

However, this implies that relevant national collectives do not contribute to the European-level organisations' representativeness. For instance, Austria's WKÖ-FVALS, Denmark's DI and Hungary's MVVLSz⁶⁹ organise companies employing the vast majority of the sector's workforce, without being affiliated to any European-level social partner organisation. Most of the employer organisations identified represent companies in ground handling activities, while fewer than one third of employer organisations represent companies active in air transport activities, and fewer than a quarter represent companies active in ATM. Only two employer organisations, DI of Denmark and Palta of Finland, have membership domains covering the entire sector. All of the 31 organisations not represented in the ESSDC through one of the European-level social partners are involved in sector-related collective bargaining; otherwise they would not have been included in this study.

Table 117: Characteristics of employer organisations not represented in the ESSDC through affiliation to EU-level social partner organisations

Member State	Employer organisation	Total number of companies represented in civil aviation	% of civil aviation employees represented through member companies	Occupations covered (NACE codes)					Collective bargaining involvement
				Pilots (51.10 + 51.21)	Cabin crew (51.10)	ATCOs (52.23)	ATSEP + other ATM (52.23)	Ground handling (52.23)	
AT	WKÖ-FVALS	380	93	yes	yes			yes	MEB + SEB
BE	BAR	n.a.	n.a.	yes	yes				MEB
BE	BATA	8–15	n.a.	yes	yes				MEB
BE	UPTR	2,611	n.a.					yes	MEB
BE	FEBETRA	4	n.a.					yes	MEB
BE	WF-BE	n.a.	n.a.					yes	MEB
DE	AGVL	41	52	yes	yes		yes	yes	MEB + SEB
DE	ABL	7	11					yes	MEB
DE	VKA	n.a.	n.a.			n.a.	n.a.	yes	MEB
DE	BDLS	23	n.a.					yes	MEB
DK	DI	28–30	75–90	yes	yes	yes	yes	yes	MEB
EL	AOFA	n.a.	n.a.					yes	MEB
ES	AECA	30	n.a.	yes	yes				MEB
ES	ASEATA	7	n.a.					yes	MEB
FI	Palta	17	n.a.	yes	yes	yes	yes	yes	MEB + SEB
FR	FNAM	176	55	yes	yes			yes	MEB
FR	SAMERA	6	3					yes	MEB
FR	SCARA	12	3					yes	MEB
HU	MVVLSz	11	82					yes	SEB
IT	Assaereo	2	25	yes	yes				MEB + SEB

⁶⁹ HungaroControl, the Hungarian ANSP, has left MVVLSz, which now no longer represents the employers of ATM staff. MVVLSz does, however, still have member companies active in ground service activities.

Member State	Employer organisation	Total number of companies represented in civil aviation	% of civil aviation employees represented through member companies	Occupations covered (NACE codes)					Collective bargaining involvement
				Pilots (51.10 + 51.21)	Cabin crew (51.10)	ATCOs (52.23)	ATSEP + other ATM (52.23)	Ground handling (52.23)	
IT	Feder catering	5	3					yes	MEB + SEB
IT	Assocontrol	3	n.a.			yes	yes		MEB + SEB
IT	Assohandlers	n.a.	n.a.					yes	MEB
IT	FAIRO	59	n.a.					yes	MEB
NL	WPBL	n.a.	n.a.					yes	MEB
PT	AESH	2	10					yes	MEB
PT	RENA	19	1					yes	MEB
SE	Sobona	20	5					yes	MEB
SE	ALMEGA	2	27					yes	MEB
SE	SAGE	1	7			yes	yes		MEB
SK	UZVCL SR	n.a.	n.a.			yes	yes	yes	MEB + SEB
Total	31 employer organisations in 14 Member States			9 in 8 MS	9 in 8 MS	5 in 5 MS	6 in 6 MS	25 in 14 MS	31 in 14 MS
All EOs	36 in 16 15 Member States			11 in 10 MS	11 in 10 MS	5 in 5 MS	8 in 7 MS	29 in 16 MS	33 14 Member States
% of all EOs	86			82	82	100	75	86	94
% of countries	88			80	80	100	86	88	100

Notes: Green cells indicate a positive response. Dark blue indicates involvement in sector-related multi-employer bargaining (sometimes in combination with single-employer bargaining), whereas light blue indicates involvement in only single-employer bargaining. EO, employer organisation; MEB, multi-employer bargaining; n.a., data not available; SEB, single-employer bargaining.

Source: Network of Eurofound correspondents' national contributions to this study, 2020

7.9. Other European employer organisations and EU business associations

Table 118 below includes European-level employer and business associations that are not represented on the civil aviation ESSDC and to which the sector-related national employer organisations and companies are affiliated. The situation of the employers is different from that of the trade unions. There are more companies in more Member States that record affiliations to 'other' organisations not participating in the ESSDC. More importantly,

7.9.1. overview of other identified sectoral organisations not participating in the ESSDC

All the affiliations to the 'other' European associations have – perhaps with the exceptions of CEEP (as a general public service interest organisation) and CEETRA (as the voice of the CEE travel retailers) – a clear reference to the civil aviation sector. However, the 'other' employer and business associations identified at European level differ from each other in terms of type of organisation: A4E is the largest EU-level association of airlines, with a membership covering nearly all ENAA member airlines, and both network and low-fare airlines. EASA, Eurocontrol and IFATSEA are, on the other hand, public or quasi-governmental organisations established at European level for different purposes. (EASA is an EU agency guaranteeing aviation safety;

Eurocontrol⁷⁰ is an intergovernmental organisation monitoring operations and performance of European civil aviation; and IFATSEA represents the professional associations of ATSEP.) Last but not least is EUROCAE, a business association supporting the work of ATCOs by developing technical industry standards and representing both profit-oriented businesses (such as manufacturers) and ANSPs.

Despite the differences in objectives and organisational structure, all these European associations (with the exception of CEEP and partly of IFATSEA) claim to be lobbying organisations rather than social partner organisations with pronounced labour market interests. This is why, for instance, EUROCAE, which brings together a number of ATC entities from several countries, does not question CANSO's position as uncontested representative of Europe's ATC service providers in social matters. The same holds true of all other alternative organisations (with the exception of CEEP, which is a social partner at European cross-industry level); moreover, with the exception of EUROCAE, they all represent sector-related companies in only up to three Member States.

Table 118: Other EU-level associations with civil aviation sector national employer organisations/business associations/companies as members, 2020

Other EU employer organisations/business associations			Member States with an affiliate according to organisation website	Member States with a civil aviation sector affiliate company/organisation
Abbreviation	Full name	Assessment of sector-relatedness		
A4E	Airlines for Europe	A4E sees itself as the united voice of Europe's leading airlines. Some of the A4E members have set up A4D in order to participate in sector-related European social dialogue.	10	2 companies in 2 Member States: FR (Air France), NL (KLM)
CEEP	European Centre of Employers and Enterprises providing Public Services and Services of general interest	CEEP represents the European providers of public services and services of general interest and advocates modern and solidarity-based organisation of these services to the benefit of all European citizens.	27	2 companies in 2 Member States: DE (VKA), PT (TAP)
CEETRA	Central and Eastern European Travel Retail Association	CEETRA is a regional industry association organising companies in the duty-free and travel retail industry in the central and eastern European region. The association represents companies involved in the production or supply of goods to travelling consumers in all travel retail outlets throughout the central and eastern European region.	9	1 company in 1 Member State: AT (Vienna International Airport)
EASA	European Union Aviation Safety Agency	EASA is the EU agency tasked with establishing common standards for aviation safety and environmental protection, and setting up a single certification process among Member	27	2 agencies in 2 Member States: CY (DCA), EL (HCAA)

⁷⁰ Eurocontrol is an international organisation with delegated powers within the Single European Sky reform.

		States. National members are transport authorities (ministries).		
EUROCAE	European Organisation for Civil Aviation Electronics	EUROCAE is a European business association dedicated to the development of worldwide-recognised industry standards for aviation, with regard to both regulatory processes and technical standards. (13 of its member organisations are also affiliated to CANSO Europe – only CPH (DK) and GNSS Agency (CZ) are not.)	17	15 organisations in 13 Member States: AT (Austro Control), BE (Skeyes), BG (BULATSA), CZ (ANS CR and GNSS Agency), DK (CPH and Naviair), ES (ENAIRE), FR (DGAC), HU (HungaroControl), IT (ENAV), NL (LVNL), PL (PANSAs), PT (NAV Portugal), RO (ROMATSA)
Eurocontrol	Eurocontrol	Eurocontrol is a pan-European, civil–military organisation dedicated to supporting European aviation. It is financed by and composed of European countries’ authorities.	27	ANSP in all EU MS
IFATSEA	International Federation of Air Traffic Safety Electronics Associations	IFATSEA brings together the professional associations of ATSEP worldwide, contributes to the work of the SESAR joint undertaking and participates in the EASA rule-making activities related to ATSEs. ⁷¹	23	2 organisations in 2 Member States: BG (BULATSA), EL (HCAA)

Source: Authors’ own compilation based on the Network of Eurofound Correspondents’ national contributions, 2020

Over the years, there have been several European consultations in the civil aviation sector. Basically, these have concerned all aspects of civil aviation within which the European Commission, in particular the Directorate-General for Mobility and Transport, has launched policy initiatives: the aviation strategy for Europe; the ongoing development of the single European aviation market; the gradual development of a coordinated EU external aviation policy; the promotion of the Single European Sky initiative and of SESAR; and so on. Looking at the European associations that have been consulted over the past years and decades, beyond those represented in the ESSDC for the civil aviation sector and those listed in Table 118 above, reveals a few business associations that do not deal with issues related to working conditions and employment regulation and are thus not genuine social partner organisations. These associations are:

- International Federation of Aeronautical Information Management Associations (IFAIMA)
- International Federation of Air Traffic Controllers’ Associations (IFATCA)
- International Civil Aviation Organization (ICAO, UN agency)

Other European business associations with no activities related to working conditions and no cooperation with European trade union organisations include the European Business Aviation Association (EBAA – www.ebaa.org), the European Tourism Association (ETOA – www.etoa.org) and IATA Europe (www.iata.org). None of these organisations have affiliated national employer organisations from the sector (included in Chapter 2 in this study), and, as they do not develop any activities regarding working conditions or cooperation with European trade union organisations, they are business associations.

In each of the three subsectors there is one ‘other’ European association not included in the ESSDC that deserves to be mentioned here. For the aircrew employers it is the Air Charter Association, for the ground handling sub sector it is ACA Catering, and for the air traffic management sub sector it is EUROCAE.

⁷¹ IFATSEA is a hybrid organisation rather than a pure business association/employer organisation, since it also has trade unions as members (for instance, GdF of Germany and Unionen of Sweden).

7.9.2. Assessment of the representativeness of charter airline companies

During 1990 to 1994, the Air Chartered Carrier Association (ACCA) was involved in the early years of the civil aviation sector European social dialogue (see Table 2). The importance of chartered airline companies for the sector is described in section 5.2.6. From Table 35, it can be deduced that these type of airline companies operate between 10% and 20% of all registered aircraft in the EU, mostly small aircraft with a small number of seats, although some do operate larger aircraft similar to the size of network carriers or leisure airline companies (see Table 42). The Air Charter Association organises the interests of this group of companies in the sector. From the website of this organisation, there is no indication that it also represents the interests of its member companies as employer of the employees working in these activities. Table 96 shows that a small number of charter airline companies are affiliated to ERA.

7.9.3. Assessment of the representativeness of ACA Catering

The ACA (www.aca.catering) has not been considered in this study. Tables 2 and 12 indicate that ACA Europe co-signed a joint opinion for the first time in February 2021. Its member companies do operate in a number of Member States, although their focus is on catering services, which are part of the catering sector (NACE 56.29). That is covered by a separate representativeness study for the catering sector (Eurofound, 2018).

7.9.4. Assessment of the representativeness of EUROCAE

EUROCAE is the only European association that has affiliated employer organisations in more than five EU Member States and is not represented in the ESSDC. Its website indicates that it focuses on standardisation issues in the ATM field. Among the 15 affiliated employer organisations, 13 are the largest employers in ATM in their 13 countries: Austria, Belgium, Bulgaria, Denmark, France, Hungary, Italy, the Netherlands, Poland, Portugal, Romania and Spain. However, these 13 are all also members of CANSO. The only two that are not members of CANSO are GNSS in Denmark (also affiliated to ERA) and CPH in Denmark (also affiliated to ACI Europe). So all of EUROCAE's members are represented by CANSO, ERA or ACI on the ESSDC. As EUROCAE does not give any indication of any kind of cooperation with trade unions or of activities related to working conditions of ATCOs or ATM employees, it is not characterised as a social partner organisation in the scope of this study.

7.10. Comparative analysis of the representativeness of ENAA, AIRE, ERA, A4D, CANSO, ACI and ASA

Table 119 below compares the representativeness of the European employer organisations for the civil aviation sector. The seven organisations currently represented on the civil aviation ESSDC primarily or exclusively rely on direct company membership, whereas they do not (ENAA, AIRE, A4D and CANSO) or only rarely (ERA, ACI and ASA) have employer organisations as members. The European organisations can be grouped according to two criteria, the first being their quantitative representativeness in terms of national affiliates and countries covered, and the second – and more meaningful – targeting their membership domain in terms of business activities.

With regard to the first criterion, two groups of European employer organisations can be distinguished. The first group consists of three organisations with members in (almost) all Member States, namely ERA, CANSO and ACI. The second group is made up of organisations that have affiliates in only a few or several countries, in any case fewer than half of the EU27; this group comprises ENAA, AIRE, A4D and ASA.

With regard to the second criterion – the organisations' (core) membership domain – a distinction can be made among the three working groups that exist within the framework of the civil aviation ESSDC, each covering a particular business segment of the civil aviation industry: passenger and freight air transport, ATM

services, and ground handling. In line with this fragmentation of the civil aviation European social dialogue structure, ENAA, AIRE, ERA and A4D can be assigned to the air transport subsector, CANSO to the ATM subsector (employing, in particular, ATCOs and ATSEP), and ACI and ASA to the ground handling subsector (including, in particular, airport and related activities). However, it is important to note that these assignments are made for reasons of classification, and not on the basis of exclusiveness. For instance, ENAA, AIRE, ERA and A4D all represent airlines that also may operate (part of) the ground handling services related to their core air transport business.

Within the air transport subsector, ERA has the strongest representativeness, in terms of both the absolute number of members (170) and the number of countries covered through affiliations in 24 Member States. It combines company and employer organisation membership, although the latter is numerically almost insignificant, with only three employer organisations affiliated. Whereas the total numbers of members (per country) have been provided by ERA, the disaggregated figures for particular NACE codes and occupations stem from the Network of Eurofound Correspondents, who have used their own judgement about which national affiliates are the most important. ERA's strength lies in air transportation activities (in combination with ground handling services), although the organisation's membership domain with regard to the civil aviation sector is relatively broad, including airlines (Table 96) and ground service companies (Table 97), such as airports (Table 98).

ENAA, as the specific voice of air carriers committed to a socially and economically fair international air transport system, and AIRE, representing airlines and associate members (ground handlers, etc.), record – compared with ERA – significantly lower representativeness in civil aviation, in terms of both absolute numbers of members and countries covered. Even within their core membership domain (airlines) they both organise and represent only small proportions of the sector's companies. ENAA covers nine Member States through 10 company affiliates, while AIRE covers nine Member States through 14 company affiliates. All of the 10 ENAA members are involved in collective bargaining, while only 6 of the 14 AIRE members engage in collective bargaining.

The fourth European employer organisation with a core membership domain in air transport is A4D. Whereas this association is comparable with ENAA and AIRE in terms of the absolute number of members (12), it covers only three Member States through its affiliates. Nine of the 12 members engage in single-employer collective bargaining, covering three Member States.

CANSO Europe is the only European-level social partner organisation representing the ATM subsector within civil aviation, organising the largest ANSP in each of 25 Member States. Other than its members in Luxembourg and Sweden, all CANSO Europe-affiliated ANSPs are involved in collective bargaining, in 23 EU Member States. The Swedish affiliated ANSP is indirectly involved in collective bargaining on behalf of ATM staff, through the employer organisation Arbetsgivarverket SAGE. In 17 Member States 100% of the ATM staff are employed by the ANSP affiliated to CANSO Europe, and in another 4 Member States almost 100%.

In the ground handling subsector, two European social partner organisations on the employer side are relevant: ACI and ASA. ACI is by far the more representative; it represents one employer organisation and 165 companies (most of them airports) in 27 Member States. ASA represents one employer organisation and 12 companies (all ground and air cargo handlers) in 10 Member States. Eight of the 13 ASA members are involved in collective bargaining, in five Member States. For ACI, only minimum numbers for members involved in collective bargaining (48 of 166) and for members representing subactivities can be given, for the same reason as ERA (see above): the total number of affiliates has been provided by ACI, whereas the numbers disaggregated by subsectors stem from the Network of Eurofound Correspondents on the basis of only selected members. Therefore, the figures for ACI disaggregated by subactivities (as well as those for collective bargaining involvement) tend to be underestimated.

When considering only the largest (in terms of workforce) company/employer per subsector and Member State, and its affiliation to the European level social partner organisations (Table 120), a quite different picture emerges. In the business area of air transport, where four European associations at least partially compete for the same companies (airlines), most of the individual Member States' largest airlines (9) are affiliated to ENAA, while there are 3 affiliations each to ERA and A4D and 2 to AIRE. Hence, ENAA represents more of the Member States' largest employers of pilots and cabin crew than the other three associations combined. However, it is also noteworthy that in about eight Member States the largest employer of pilots and cabin crew is not affiliated to any of these four European associations (see Table 144). For Lithuania and Luxembourg, the largest employer of pilots and cabin crew could not be identified, due to a lack of data.

By contrast, for ATM (in particular, air traffic control), CANSO Europe's representativeness is clear: it represents the only or – in countries with pluralist ATC systems – the largest ATC organisation in each Member State. CANSO's representativeness in this particular business segment is undisputed.

In the airport and ground handling services subsector, ACI and ASA (partially) compete for the same company members, even though ACI's membership domain focuses primarily on airports (but also includes pure ground handlers), whereas ASA represents only ground service providers (but no airports). Table 119 indicates that ACI represents the largest employer in this business area in 13 Member States, and ASA does so in 2 Member States. More precisely, in 9 Member States the largest national airport is the largest employer of ground handling staff and affiliated to ACI, while in 4 Member States the largest employer is a ground handling provider rather than an airport and nevertheless affiliated to ACI. In 2 Member States, the largest employer is a ground handling service provider and affiliated to ASA. In 10 Member States, the largest employer of ground handling staff is not affiliated to either ACI or ASA, but in some cases, if the largest employer in this business segment is an air carrier that operates its own ground handling activities (such as Lufthansa or Air France), it is affiliated to another European organisation (ENAA, ERA).

Table 119: Comparative analysis of the representativeness of the European employer organisations with members in the civil aviation sector

Organisation	Employer organisation members and company members total	Type of affiliation/ coverage	Occupations covered (NACE codes)					Employer organisation and company involvement in collective bargaining
			Pilots (51.10 + 51.21)	Cabin crew (51.10)	ATCOs (52.23)	ATSEP + other ATM (52.23)	Ground handling (52.23)	
ENAA	10 companies	Number of EOs and companies affiliated to ENAA	10	10	0	1	9	10
	% of 10	Proportion of organisations affiliated to ENAA	100	100	0	10	90	100
	9 Member States	Coverage in terms of MS	9	9	0	1	8	9
AIRE	14 companies	Number of EOs and companies affiliated to AIRE	14	14	0	1	7	6
	% of 14	Proportion of organisations affiliated to AIRE	100	100	0	7	50	43
	9 MS	Coverage in terms of MS	10 (9)	10 (9)	0	1 (1)	5 (5)	5 (4)

Organisation	Employer organisation members and company members total	Type of affiliation/ coverage	Occupations covered (NACE codes)					Employer organisation and company involvement in collective bargaining
			Pilots (51.10 + 51.21)	Cabin crew (51.10)	ATCOs (52.23)	ATSEP + other ATM (52.23)	Ground handling (52.23)	
ERA	3 EOs and 167 companies	Number of EOs and companies affiliated to ERA	At least 25	At least 22	At least 1	At least 7	At least 30	At least 25
	% of 170	Proportion of organisations affiliated to ERA	At least 15	At least 13	At least 1	At least 4	At least 18	At least 15
	24 MS	Coverage in terms of MS	At least 16 (15)	At least 14 (13)	At least 1 (1)	At least 5 (4)	At least 16 (15)	At least 14 (13)
A4D	12 companies	Number of EOs and companies affiliated to A4D	12	12	0	0	7	9
	% of 12	Proportion of organisations affiliated to A4D	100	100	0	0	58	75
	3 MS	Coverage in terms of countries	4 (3)	4 (3)	0	0	4 (3)	4 (3)
CANSO Europe	28 companies	Number of EOs and companies affiliated to CANSO	0	0	28	28	2	24
	% of 28	Proportion of organisations affiliated to CANSO	0	0	100	100	7	86
	27 MS	Coverage in terms of MS	0	0	28 (27)	28 (27)	2 (2)	24 (23)
ACI Europe	1 EO and 165 companies	Number of EOs and companies affiliated to ACI	0	0	At least 2	At least 12	At least 67	At least 48
	% of 166	Proportion of organisations affiliated to ACI	0	0	At least 1	At least 7	At least 40	At least 29
	27 MS	Coverage in terms of MS	0	0	At least 2 (2)	At least 7 (7)	At least 27 (26)	At least 20 (19)
ASA	1 EO and 12 companies	Number of EOs and companies affiliated to ASA	0	0	0	0	12	8
	% of 13	Proportion of organisations affiliated to ASA	0	0	0	0	100	62
	10 MS	Coverage in terms of MS	0	0	0	0	11 (10)	6 (5)

Notes: EO, employer organisation; MS, Member State.

Sources: ERA, ACI and the Network of Eurofound Correspondents, 2020

Table 120: European affiliations of the largest civil aviation employer in each Member State, by subsector

Member State	Company employing most pilots and its affiliation to ENAA, AIRE, ERA and/or A4D	Company employing most cabin crew and its affiliation to ENAA, AIRE, ERA and/or A4D	Company employing most staff in ATM and its affiliation to CANSO Europe	Company employing most staff in ground handling and its affiliation to ACI and/or ASA
AT	Austrian Airlines: ENAA	Austrian Airlines: ENAA	Austro Control: CANSO Europe	Vienna International Airport
BE	Brussels Airlines: ENAA	Brussels Airlines: ENAA	Skeyes: CANSO Europe	Brussels Airport: ACI
BG	Bulgarian Air Charter	Bulgarian Air Charter	BULATSA: CANSO Europe	Sofia Airport: ACI
CY	Cyprus Airways	Cyprus Airways		Swissport Cyprus
CZ	Smartwings	Smartwings	ANS CR: CANSO Europe	Letiště Praha: ACI
DE	Lufthansa: ENAA, (ERA)	Lufthansa: ENAA, (ERA)	DFS: CANSO Europe	Lufthansa
DK	SAS: ENAA	SAS: ENAA	Naviair: CANSO Europe	SAS Ground Handling: (ACI)
EE	Regional Jet OÜ	Regional Jet OÜ	EANS: CANSO Europe	Tallinn Airport: ACI
EL	Aegean Airlines	Aegean Airlines		Goldair Handling: ASA
ES	Iberia: A4D	Iberia: A4D	ENAIRES: CANSO Europe	Iberia Airport Services
FI	Finnair: A4D	Finnair: A4D	ANS Finland: CANSO Europe	Swissport Finland
FR	Air France: ENAA	Air France: ENAA	DGAC: CANSO Europe	Air France
HR	Croatia Airlines: ENAA, ERA	Croatia Airlines: ENAA, ERA	CCL: CANSO Europe	Zagreb Airport: ACI
HU	Wizz Air	Wizz Air	HungaroControl: CANSO Europe	Budapest Airport: ACI
IE	Air Lingus: A4D	Air Lingus: A4D	IAA: CANSO Europe	daa: ACI
IT	Alitalia	Alitalia	ENAV: CANSO Europe	Alitalia
LT	n.a.	n.a.	Oro Navigacija: CANSO Europe	FL Technics
LU	n.a.	n.a.	ANA: CANSO Europe	n.a.
LV	Air Baltic Corporation	Air Baltic Corporation	LGS: CANSO Europe	Riga International Airport: ACI
MT	Air Malta	Air Malta	MATS: CANSO Europe	MIA: ACI
NL	KLM: ENAA	KLM: ENAA	LVNL: CANSO Europe	Swissport: ASA
PL	LOT Polish Airlines: AIRE	LOT Polish Airlines: AIRE	PANSA: CANSO Europe	LS Airport Services
PT	TAP: ENAA	TAP: ENAA	NAV Portugal: CANSO Europe	Groundforce
RO	Blue Air: ERA	Blue Air: ERA	ROMATSA: CANSO Europe	Bucharest Airport Otopeni: ACI
SE	SAS: ENAA	SAS: ENAA	LFV: CANSO Europe	Swedavia: ACI
SI	No activities	No activities	Slovenia Control: CANSO Europe	Fraport Slovenija: ACI
SK	Air Explore: AIRE	Air Explore: AIRE	LPS: CANSO Europe	BTS
Total EU27	9 × ENAA; 2 × AIRE; 3 × ERA; 3 × A4D	9 × ENAA; 2 × AIRE; 3 × ERA; 3 × A4D	25 × CANSO Europe	13 × ACI; 2 × ASA

Notes: Affiliation in parentheses means indirect membership via higher- or lower-order unit. n.a., data not available.

Source: Network of Eurofound correspondents, 2020

When looking at each Member States' three largest employers in the air transport subsector, it is evident that 33 of 81 companies covering 18 countries are directly affiliated to at least one of the EU-level employer organisations in this subsector: ENAA, AIRE, ERA and A4D. This means that 41% of the three largest employers

in each country in two-thirds of all Member States are under the umbrella of one of these four associations (see Table 135 in Annex 2). Table 136 in Annex 2 reveals that in the ground handling subsector an even larger proportion of the three largest employers are affiliated to at least one of the seven sector-related European-level employer associations: ENAA, AIRE, ERA, A4D, CANSO, ACI and ASA. In this subsector, 36 of the 81 largest employers (44%) from 22 Member States are members of one of these organisations. In addition, there are two large employers in Italy and Sweden that are indirect members via their affiliation to national employer organisations, which are, in turn, affiliated to ACI (Assaeroporti of Italy) and ERA (Transportföretagen of Sweden). Direct and indirect members of all seven European-level employer associations thus cover 47% of the largest national employers in the ground handling subsector.

8. Participation in and achievements of the civil aviation ESSDC

8.1. Effective participation in the civil aviation sector ESSDC

In 2018, the aviation ESSDC held a plenary meeting in June. The October meeting concerned the ground handling subsector. In 2019, there were four meetings: in April, June, October and December. The June meetings saw the most participants: 35 trade union delegates in 2018 and 32 in 2019. In the other ESSDC meetings, the number of trade union delegates varied between 8 and 13. The employers' delegates varied from 6 to 12.

Looking at countries from which there was effective participation in the ESSDC for the civil aviation sector in 2018 and 2019 (Table 121), the trade unions had participants from 14 Member States, and the employer organisations had participants from 10 then Member States, including the UK.

Table 121: Effective participation in the ESSDC for the civil aviation sector, 2018–2019

14 Member States with trade union participation in the ESSDC for the civil aviation sector	AT, BE, BG, DE, DK, ES, FR, IE, IT, LT, NL, PL, PT, SE
9 Member States with employer organisation participation in the ESSDC for the civil aviation sector	BE, DE, EL, FR, HU, IE, IT, PL, SE

Note: For this analysis two meetings in 2018 (on 22 June and 30 October) and four meetings in 2019 (on 2 April, 21 June, 17 October and 12 December) were considered.

Source: Eurofound, European Commission

This means that ETF-affiliated trade unions from Czechia, Estonia, Finland, Greece, Hungary, Luxembourg, Malta and Romania (eight Member States) did not participate in ESSDC meetings in 2018 or 2019. ECA affiliates from Croatia, Czechia, Finland, Hungary, Latvia, Luxembourg and Malta (seven Member States) did not participate in ESSDC meetings. ATCEUC members from Croatia, Cyprus, Finland, Greece, Lithuania, Luxembourg, Romania and Slovenia (eight Member States) did not attend.

There are 18 Member States from which there was no employer organisation representative at any of the 2018 or 2019 meetings of the ESSDC. CANSO has a member organisation in each of these countries, ACI in 17, ERA in 10, ASA in 6, ENAA in 5, AIRE in 4 and A4D in 2.

In section 8.3 the number of Member States where each of these organisations has an affiliated organisation will be illustrated. These findings regarding effective participation may call into question whether all these members from those countries are effectively represented in the ESSDC meetings, as they appear not to have attended any of them in 2018 or 2019.

It needs to be mentioned here that many of the officers representing the European social partner organisations have changed during the period this study was conducted. The high degree of turnover among colleagues involved in the ESSDC is reported to be a recurring challenge to building up trust and effective cooperation. The ESSDC contact person for some organisations left in 2020 or 2021 and has yet to be replaced. More stability and continuity would certainly help the effectiveness of the ESSDC.

A detailed analyses of each European social partner organisation's capacity to negotiate was made in Chapters 6 and 7. Table 122 lists all the texts approved by the European social partner organisations in the aviation sector.

8.2. Achievements of the civil aviation sector ESSDC

Table 122: Texts adopted by the aviation ESSDC and European partner organisations signing them

Date	Name of agreed text	ETF	ECA	ATCEUC	EurECCA		ENAA	AIRE	ERA	A4D	CANSO	ACA	ACI	ASA	AEA	IACA	IAHA
30/11/2021	Joint appeal from civil aviation social partners on 'unruly passengers' to EU Member States																
10/05/2021	Joint action plan by the European social partners in civil aviation on safely resuming travel during COVID-19																
01/02/2021	Joint statement by the European social partners in civil aviation on COVID-19 inoculation for aviation workers																
01/02/2021	Joint statement by the European social partners in civil aviation on COVID-19 inoculation for aviation workers																
22/10/2020	Joint statement by the European social partners in civil aviation on payroll support schemes for aviation in response to the COVID-19 pandemic																
21/09/2020	Statement to the Council by the social partners in the civil aviation sectoral social dialogue committee on the response to COVID-19																
13/05/2020	COVID 19 – European airports, transport workers and aviation suppliers call for urgent support in joint statement																
26/03/2020	Effects of COVID-19 and need for action in European aviation. Joint appeal to the EU institutions and the Member States (final version 21/09/2020)																
21/06/2019	Civil aviation rules of procedure																
03/10/2018	Change management in the ATM industry: Principles and process																
03/10/2018	Joint statement of the ATM social partners																
03/10/2018	ATM just culture toolbox																
19/01/2018	Joint statement on aviation ground handling																
17/04/2017	Joint opinion of the social partners on market access, social conditions and standards in the aviation ground handling industry (conclusion of the April 2017 conference)																
09/09/2016	Joint statement of the air traffic management social partners																
05/11/2015	Toolbox for successful social dialogue in the air traffic management industry																
13/02/2015	Joint statement of the European aviation sector social partners in the air crew working group on atypical employment																
05/06/2014	Joint declaration against EU-based flags of convenience in aviation																
29/11/2013	ATM European social partners recommendations on mobility of workers within the ATM sector																

Date	Name of agreed text	ETF	ECA	ATCEUC	EurECCA		ENAA	AIRE	ERA	A4D	CANSO	ACA	ACI	ASA	AEA	IACA	IAHA	
22/10/2013	Statement of ATCEUC, CANSO and ETF on the Commission proposal on the SES II+ package																	
21/06/2012	Guidelines for consultation arrangements for functional airspace blocks																	
17/11/2011	Joint statement on the role of the European social dialogue in the implementation of the Single European Sky																	
08/06/2011	Joint position on the social security regime applicable to air crews																	
07/04/2011	Statement on the revision of the Ground Handling Directive																	
30/04/2010	Single European Sky II implementation – Consultation of ATM social partners																	
18/03/2010	ATM social partners position on the implementing rules of the performance scheme																	
30/06/2009	Joint CANSO–ETF analysis on the ATM social dialogue FAB questionnaire																	
18/06/2009	Cooperation agreement between ATCEUC and ETF																	
05/05/2009	Joint declaration on training and qualification in the ground handling sector																	
31/03/2009	Charter and company guidelines on just culture																	
17/10/2008	Joint statement on workplace health promotion for air crew																	
28/02/2008	Joint CANSO–ETF statement for the second Single European Sky package																	
22/11/2007	CANSO–ETF common understanding on a competence and training scheme for air traffic safety electronics personnel (ATSEP)																	
09/10/2007	Joint statement from the European Conference on Functional Airspace Blocks																	
17/07/2007	Guidelines for consultation arrangements for functional airspace blocks																	
20/06/2007	Joint statement on just culture																	
24/01/2007	Joint CANSO–ETF statement on functional airspace blocks developments																	
03/11/2006	Report by the Social Dialogue Air Traffic Management Work Group on the implications of functional airspace blocks																	
23/02/2006	Joint statement on the south east European functional airspace blocks approach																	
16/06/2005	CANSO/ETF statement on the ATCO licence draft directive																	
21/01/2005	Joint statement on quality, safety and training in the ground handling sector																	
18/09/2004	Joint statement from the Palermo Conference social partners: Key players in the FABs																	
10/06/2003	Rules of procedure – Civil aviation																	
14/05/2003	Letter to the Commission – Single European Sky																	
16/10/2001	Communication from the aviation industry to the Council of Transport Ministers meeting in Luxembourg on October 16, 2001																	

Date	Name of agreed text	ETF	ECA	ATCEUC	EurECCA		ENAA	AIRE	ERA	A4D	CANSO	ACA	ACI	ASA	AEA	IACA	IAHA	
12/10/2001	Crisis in air transport. Joint opinion																	
22/03/2000	European agreement on the organisation of working time of mobile staff in civil aviation																	
18/04/1994	Opinion on the Commission's consultation document on ground handling services																	
01/03/1994	Recommendation on working time of ground staff																	
15/09/1993	Opinion on the vocational training of ground engineers and maintenance staff																	
18/12/1992	Statements on dispatchers																	
26/02/1992	Joint opinion on the third phase of air transport liberalization																	
21/02/1992	Joint opinion on civil aviation and the environment																	
20/11/1991	Recommendations on the impact of the EC's fiscal harmonization programme on the air transport sector																	
20/11/1991	Joint statement on the harmonization of air traffic controllers' licences																	
28/02/1991	Statement on employment in the industry																	
15/01/1991	Opinion on a proposal for a Council Regulation on the flight time, the flight duty time and rest periods of flight-deck crews of civil aircraft																	
06/11/1990	Opinion on slot allocation and airport scheduling																	

Source: European Commission, Social dialogue texts database

8.3. Overview of the landscape of the European social partners

This section will bring all the information from Chapters 6 and 7 together in an overview for each of the three activity groups: first the European organisations representing the employees and employers in aircrew activities, then those in ATM activities and finally those in ground handling activities.

The European trade unions ETF and ECA represent pilots and cabin crew from 16 and 18 Member States, respectively, on the aviation ESSDC. EurECCA also counts affiliates in 6 Member States that are not represented in the ESSDC. On the side of the employers of aircrew, ERA appears to be the most representative, with affiliates in 15 Member States, followed by ENAA and AIRE, which have affiliates in 9 Member States each, and A4D, with affiliates in 3 Member States.

Affiliates are involved in collective bargaining in 15 Member States for ETF, 14 for ECA and 6 for EurECCA. On the employers' side, ERA has member organisations involved in collective bargaining in 11 Member States, ENAA in 9 and AIRE in 4.

A4D's involvement in collective bargaining was confirmed for Austria, Finland, Ireland and Spain (Table 86); Ryanair provided information in Table 84 illustrating that it operates as an employer of aircrew in 22 Member States, and information in Table 87 illustrating the 12 Member States where it is involved in social dialogue or collective bargaining shaping the working conditions of aircrew. Because this information was only provided after the study had been finalised, it could not be checked and confirmed within the scope of the study.

Table 123: Landscape of European organisation in the three areas of the civil aviation sector

Category	Representing aircrew employees and employers	Representing ATM employees and employers	Representing ground handling employees and employers
European trade unions	ETF (16 MSs; CB in 15) ECA (18 MSs; CB in 14) EurECCA (6 MSs; 5 in CB)	ETF (21 MSs; CB in 20) ATCEUC (20 MSs; CB in 17)	ETF (21 MSs; CB in 19)
European employer organisations	ERA (17 MSs; CB in 11) ENAA (10 MSs; CB in 9) AIRE 6 MSs; CB in 4) A4D (info not available)	CANSO Europe (all 27 MSs; CB in 23) ACI Europe (6 MSs; CB in 4) ERA (3 MSs; CB in 3)	ACI Europe (27 MSs; CB in 19) ERA (15 MSs; CB in 13) ASA (10 MSs; CB in 5) affiliated companies with operations in 23 MS ENAA (8 MSs; CB in 8) AIRE (5 MSs; CB in 3) A4D (3 MSs; CB in 3)

Notes: CB, collective bargaining; MS, Member State. EurECCA is in grey type because it is not a European social partner organisation participating in the ESSDC.

Source: Summary of Tables 56, 57 and 58

For the employees in ATM activities, ETF and ATCEUC are the most representative European trade unions. CANSO represents employers in all Member States. ACI-affiliated ATM employers can be found in six Member States, and ERA affiliates in three Member States. CANSO is thus clearly the most representative European employer organisation for ATM activities.

ETF is the only and most representative European trade union representing workers in ground handling activities, in 21 Member States. On the side of the employers in ground handling activities, ACI has affiliates in 26 Member States, ERA in 15, ASA in 10, ENAA in 8, AIRE in 5 and A4D in 3. These summarised findings for each activity group are presented in Table 123 above. The following three tables provide more detail for each activity group in the EU27.

Table 124: European organisations representing aircrew employees and employers

Organisation	AT	BE	BG	CY	CZ	DE	DK	EE	EL	ES	FI	FR	HR	HU	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK
ETF (trade union)	Blue	Blue				Purple	Purple	Purple		Purple	Purple	Purple	Purple		Purple	Purple		Purple		Purple	Purple	Blue			Purple		
ECA (trade union)	Blue	Blue			Purple	Purple	Purple			Purple	Purple	Purple	Purple	Blue		Purple		Purple	Purple	Purple	Purple		Blue		Purple		
ATCEUC (trade union)															Purple												
EurECCA (trade union)						Purple			Blue	Purple		Purple				Purple					Purple		Purple				
ENAA (companies)	Orange	Orange				Orange	Orange					Orange	Orange			Orange					Orange		Orange		Orange		
A4D (companies)	Orange	Grey				Grey	Grey		Grey	Orange	Orange	Grey			Orange	Grey				Grey		Grey	Grey	Grey	Grey		
AIRE (companies)							Orange			Orange						Yellow					Orange	Yellow	Yellow				Yellow
ERA (employer organisation)																									Purple		
ERA (companies)		Orange		Yellow		Orange	Orange		Orange	Orange	Orange	Orange	Orange	Yellow	Yellow		Yellow	Orange			Yellow		Orange	Yellow	Yellow		
CANSO (companies) ⁷²																											
ACI (companies)																											
ASA (companies)																											

Note: Purple cells indicate member organisations (trade unions or employer organisations) involved in collective bargaining. Blue cells indicate member organisations not involved in collective bargaining. White cells indicate countries in which the respective organisations do not have an affiliated member organisation. Yellow cells indicate countries in which there is a company affiliated that is not involved in collective bargaining. Orange cells indicate countries in which there is an affiliated company involved in collective bargaining. The grey cells are added on the request of A4D, as Ryanair provided information about its involvement in collective bargaining with trade unions in those countries (Table 87 above). This information was, however, provided at the end of the study, and could therefore not be cross-checked or confirmed.

Source: Network of Eurofound Correspondents, 2020

⁷² The members of CANSO are ANSPs that have in principle a monopoly on providing ATM services over a given area.

Table 125: European organisations representing ATM employees and employers

Organisation	AT	BE	BG	CY	CZ	DE	DK	EE	EL	ES	FI	FR	HR	HU	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK
ETF (trade union)	■	■	■		■	■	■	■	■	■	■	■		■	■	■		■		■	■	■	■	■	■		
ECA (trade union)											■																
ATCEUC (trade union)		■	■	■		■	■		■	■	■	■	■		■	■	■	■			■	■	■	■		■	
EurECCA (trade union)											■																
ENAA (companies)													■														
A4D (companies)																											
AIRE (companies)																■											
ERA (employer organisation)																											
ERA (companies)		■										■	■					■									
CANSO Europe (companies) ⁷³	■	■	■		■	■	■	■		■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
ACI (employer organisation)																■											
ACI (companies)		■				■			■				■	■		■											
ASA (companies)																											

Note: Purple cells indicate member organisations (trade unions or employer organisations) involved in collective bargaining. Blue cells indicate member organisations not involved in collective bargaining. White cells indicate countries in which the respective organisations do not have an affiliated member organisation. Yellow cells indicate countries in which there is a company affiliated that is not involved in collective bargaining. Orange cells indicate countries in which there is an affiliated company involved in collective bargaining.

Source: Network of Eurofound Correspondents, 2020

⁷³ The members of CANSO are ANSPs that have in principle a monopoly to provide ATM services over a given area.

Table 126: European organisations representing ground handling employees and employers

Organisation	AT	BE	BG	CY	CZ	DE	DK	EE	EL	ES	FI	FR	HR	HU	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK
ETF (trade union)	Purple	Purple	Purple		Purple	Purple	Purple	Purple	Blue	Purple	Purple	Purple		Blue	Purple	Purple		Purple		Purple	Purple	Purple	Purple	Purple	Purple		
ECA (trade union)																			Purple								
ATCEUC (trade union)		Purple				Purple									Purple												
EurECCA (trade union)												Purple															
ENAA (companies)	Orange					Orange	Orange					Orange	Orange								Orange		Orange		Orange		
A4D (companies)										Orange	Orange				Orange												
AIRE (companies)		Orange				Orange				Yellow						Yellow					Orange						
ERA (employer organisation)																									Purple		
ERA (companies)	Yellow	Orange				Orange	Orange			Orange	Orange	Orange	Orange				Yellow	Orange	Yellow	Orange	Orange		Orange		Yellow		
CANSO (companies) ⁷⁴									Yellow								Orange										
ACI (employer organisation)																Purple											
ACI (companies)	Yellow	Orange	Orange	Yellow	Orange	Yellow	Orange	Yellow	Orange	Orange	Orange	Orange	Orange	Yellow	Orange	Orange	Yellow	Orange	Orange	Orange	Orange	Orange	Orange	Orange	Orange	Yellow	Orange
ASA (employer organisation)			Blue																								
ASA (companies)	Grey	Grey	Grey	Orange	Grey	Grey		Yellow	Orange	Orange	Grey	Yellow		Grey	Grey	Grey			Grey	Yellow	Orange	Yellow	Orange	Grey	Grey	Grey	Grey

Note: Purple cells indicate member organisations (trade unions or employer organisations) involved in collective bargaining. Blue cells indicate member organisations not involved in collective bargaining. White cells indicate countries in which the respective organisations do not have an affiliated member organisation. Yellow cells indicate countries in which there is a company affiliated that is not involved in collective bargaining. Orange cells indicate countries in which there is an affiliated company involved in collective bargaining. The grey cells indicate the countries in which companies affiliated to ASA have operations.

Source: Network of Eurofound Correspondents, 2020

⁷⁴ The members of CANSO are ANSPs that have in principle a monopoly to provide ATM services over a given area.

9. Conclusions

The European civil aviation sector had nearly 600,000 employees in 2019, half of whom were employed as aircrew in passenger air transport. The other half of the employees in the sector worked in either ground handling activities (37% of the sectoral workforce) or ATM activities (10%). There was a significant decline in the aircrew workforce in 2012 and 2013; in 2018 and 2019, the sector had recovered, returning to 2011 workforce levels. Over 2018–2019, the number of air passengers increased by one-third, from 265,000 in 2011 to 355,000 in 2019. This increase in the number of passengers was also reflected in the number of employees in ground handling activities, which increased by about 25%; the number of companies in those activities increased by 50%. In contrast to the ATM workforce, the number of aircrew did not increase, despite the increasing number of passengers and flights to be managed. In the first chapter of this study, all these trends have been analysed, also taking into consideration the economic context in which they are to be understood.

The impact of COVID-19 on the three main activities in the sector were also analysed in detail in the first chapter, based on information provided by the Network of Eurofound Correspondents (Table 137, Table 138 and Table 139, Annex 3). Passenger numbers declined by 97% in the second quarter of 2020 compared with the second quarter of 2019 (Table 7), and commercial flights by 60% from January to October 2020 compared with 2019 (Table 8). It is in this changing context that the European sector social dialogue aims to represent the interests of the employees and employers of the civil aviation sector over the years.

In the second chapter, this study identified 166 national civil aviation sector trade unions, of which 107 (64%) are represented on the ESSDC. The other 59, from 20 Member States, are all involved in sector-related collective bargaining in their countries, but not represented on the ESSDC.

On the employers' side, 41 organisations were identified in 18 Member States. In 9 Member States no sectoral employer organisation involved in collective bargaining could be identified. In 11 Member States there is only one employer organisation. This is the case in Austria, Bulgaria, Denmark, Estonia, Finland, Greece, Hungary, Latvia, the Netherlands, Romania and Slovakia. The remaining 30 employer organisations are thus located in seven Member States: five in Belgium, four in France, four in Germany, six in Italy, three in Portugal, three in Spain and five in Sweden. It is to be noted that the countries with the largest civil aviation workforces have the most employer organisations in the sector. And even if single employer bargaining at company level predominates in the sector, there is also multi-employer collective bargaining at sector level, with significant coverage, negotiated between trade unions and employer organisations. Only 3 of those 41 sectoral employer organisations are represented on the ESSDC: one from Bulgaria, one from Italy and one from Sweden. Thirty of them are involved in collective bargaining in the civil aviation sector in their countries, but not represented in the ESSDC. The membership domain of each organisation, their status, and their involvement in collective bargaining or social dialogue structures are all analysed in detail in the second chapter.

European trade unions on the ESSDC are ETF, ECA and ATCEUC. ETF has the widest membership domain, covering all three of the activity areas. It has 63 of the 166 sectoral affiliated trade unions (39%), in 23 Member States. ETF is the most representative organisation for cabin crew, ATCOs, other ATM employees and ground handling employees. The other two European trade unions in the civil aviation ESSDC are ECA, which focuses on pilots, and ATCEUC, which mainly represents ATCOs. ECA has 19 civil aviation sector trade unions (11%) in 18 Member States, and ATCEUC has 23 trade unions (14%) in 20 Member States.

For the pilots, ETF must concede the position of most representative European organisation to ECA. The trade unions organising most of the pilots in 18 Member States are affiliated to ECA, and those in 10 Member States

to ETF, which indicates that ECA is more representative than ETF for the professional group of pilots. Together ETF and ECA have 19 affiliated trade unions organising pilots, ECA in 18 Member States and ETF in 10 Member States, which further underlines that for the pilots ECA is the most representative organisation. ECA focuses on the representation of pilots, while ETF organises all kinds of employees in the sector. Among the trade unions organising cabin crew, ETF represents about half across 16 Member States. In the cabin crew activity area, another European association appeared in this study that is not included on the ESSDC. EurECCA has six affiliated trade unions representing cabin crew in six Member States. Clearly ETF has a stronger membership base than EurECCA, which can be seen in Tables 59 and 72. The trade unions organising most of the cabin crew employees in 12 Member States are affiliated to ETF, while the largest ones in 6 Member States are affiliated to EurECCA. For the entire aircrew area, combining pilots and cabin crew, ETF is thus the most representative European trade union organisation.

The third European trade union organisation in the sector is ATCEUC, which mainly organises ATCOs and also, but to a lesser extent, other ATM employees. Among the trade unions organising ATCOs, 28 are affiliated to ETF in 15 Member States, and 20 to ATCEUC in 19 Member States. Of the trade unions organising other ATM employees, 37 are affiliated to ETF in 19 Member States, and 10 to ATCEUC in 9 Member States. In 18 Member States the trade union organising most of the ATCOs is affiliated to ATCEUC, and in 8 Member States to ETF. ETF has the second-largest ATCO trade union in eight Member States, and ATCEUC has the second largest in only one Member State. This indicates that, for the ATCO groups, ATCEUC may be slightly more representative than ETF. For the entire ATM activity area, combining ATCOs and other ATM employees, ETF remains the most representative European trade union organisation.

Finally, in the ground handling activity group, ETF is the only European trade union organisation, representing 51, or 74%, of all trade unions representing ground handling employees. In 20 Member States the trade union representing most of the ground handling employees is affiliated to ETF, and the second largest in 12 Member States (Table 74).

On the side of the European employer organisations in the civil aviation ESSDC, membership strength is based on direct affiliation of companies. Comparing the representativeness of the different organisations can thus only be done on the basis of the number of Member States where they have an affiliated company, and the number of Member States where the largest company in a specific activity area is among the affiliates.

ACI Europe has affiliate in all 27 Member States, followed by CANSO Europe and ERA, with affiliates in 25 Member States, ASA in 23 Member States, ENAA and AIRE in 9 Member States each and A4D in 3 Member States. These seven European employer organisations can be broken down into three groups: a first group consisting of ENAA, A4D, ERA and AIRE, representing mainly the employers of the aircrew, and to a lesser extent the employers of ground handling employees; second CANSO Europe, which represents ATM employees; and third ACI, ERA and ASA, which represent employers of ground handling staff.

The most representative European employer organisation in terms of the employed aircrew is ENAA, which represents the largest airline companies from nine Member States, among them Lufthansa, Air France, KLM, Austrian Airlines, Brussels Airlines, SAS, TAP and Croatian Airlines. It changed its name from ACP in 2022, but kept the same membership, statutes and organisational structures. Second is ERA, with member companies in 15 Member States and the largest airlines in three Member States. In the Member States with affiliated airlines, ERA is the most representative of the European employers' organisations of airline companies. Of these, Blue Air of Romania is the only airline that is only affiliated to ERA; the two others (Lufthansa and Croatian Airlines) are affiliated to both ERA and ENAA. The third most representative employer organisation is AIRE, with member airlines in nine Member States. AIRE has the largest airlines from two Member States; LOT (Poland) and Air Explore (Slovakia). Fourth comes A4D, with member companies in three Member States. A4D has, with Ryanair (Ireland), Finnair (Finland) and Iberia (Spain), the largest affiliated airlines in three

Member States. A4D aims to represent the low-fare airlines (LCCs), while ENAA, ERA and AIRE represent hybrid airlines combining the model of traditional national airlines with converging LCC market segments.

Among the ANSPs that are the employers of ATCOs and other ATM employees, CANSO Europe is clearly the most representative European employer organisation. CANSO Europe has affiliated ANSPs from 25 Member States and is The ANSPs employing most of the ATC and ATM employees in 25 Member States are all affiliated to CANSO Europe, making this clearly the most representative European employer organisation for the ATM sub-sector.

Finally, an assessment is to be made for employers in ground handling activities. Here ACI Europe is the most representative. ACI Europe has affiliated airports in all 27 Member States. The largest ground handling employers in 13 Member States are affiliated to ACI Europe, although these are not the countries with the largest sectoral workforces. ASA can be considered second most representative for ground handling activities, with affiliated companies in 10 Member States, of which two are the largest sectoral employer in Greece and the Netherlands. The companies affiliated to ASA have operations in 23 Member States. ERA is third, with affiliated ground handling employers in 15 Member States, although none of them is the largest employer in its country. The largest airlines affiliated to ENAA, AIRE and A4D are also involved in ground handling activities. As they cover the countries with the largest sectoral workforces, they also have to be taken into consideration. Thus, for ground handling activities, six European employer organisations are relevant: ACI Europe, ASA, ERA, ENAA, AIRE and A4D.

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Annexes

Annex 1: National aviation sector trade unions

Table 127: Abbreviations and names of trade unions in the civil aviation sector, 2020

Member State	Abbreviation	Full name in original language	Full name in English
AT	Vida	Vida Die Lebensgewerkschaft	Vida Trade Union
AT	GPA-djp	Gewerkschaft der Privatangestellten – Druck, Journalismus, Papier	Union of Salaried Employees, Graphical Workers and Journalists
AT	GPF	Gewerkschaft der Post- und Fernmeldebediensteten	Union of Post and Telecommunication Employees
AT	ACA	Austrian Cockpit Association	Austrian Cockpit Association
BE	ABVV-FGTB BTB-UBT	Belgische Transportarbeidersbond – Union Belge des Ouvriers du Transport	Belgian Union for Blue-Collar Workers in Transport
BE	BBTK-SETCa	Bond van Bedienden, Technici en Kaderleden – Syndicat des Employés, Techniciens et Cadres	Union of White-Collar Workers, Technicians and Professional Managerial Staff
BE	ACLVB-CGSLB	Algemene Centrale der Liberale Vakverbonden van België – Centrale Générale des Syndicats Libéraux de Belgique	General Union of Liberal Trade Unions of Belgium
BE	ACV-CSC Transcom	ACV-CSC Transcom	Belgian Union for Blue-Collar Workers in Transport
BE	ACV-CSC CNE	Centrale nationale des employés	National Federation for White-Collar Workers
BE	ACV Puls	Algemeen Christelijk Vakverbond Puls	ACV Puls
BE	BGATCo	Belgian Guild of Air Traffic Controllers	Belgian Guild of Air Traffic Controllers
BE	BeCA	Belgian Cockpit Association	Belgian Cockpit Association
BG	FTTUB/ СТСБ-КНСБ	Съюз на транспортните синдикати в България към КНСБ	Federation of Transport Trade Unions in Bulgaria
BG	FTW-CL Podkrepa	Федерация на транспортните работници “ПОДКРЕПА”	Federation of the Transport Workers ‘Podkrepa’
BG	BATCoU	Българската асоциация на ръководителите на полети	Bulgarian Air Traffic Controllers Association (also known as BULATCA)

Member State	Abbreviation	Full name in original language	Full name in English
CY	OIYK-SEK/ OYIK-ΣΕΚ	Ομοσπονδία Ιδιωτικών Υπαλλήλων Κυπρου	Cyprus Federation of Private Employees
CY	PASEY-PEO/ ΠΑΣΕΥ-ΠΕΟ	Παγκύπρια Συντεχνία Εργαζομένων στις Υπηρεσίες	Cyprus Trade Union of Employees in Services
CY	CYATCoU/ ΠΑΣΕΕΚ	Παγκύπρια Συντεχνία Ελεγκτών Εναέριας Κυκλοφορίας	Cyprus Air Traffic Controllers Union
CY	PASYDY/ ΠΑΣΥΔΥ	Παγκύπρια Συντεχνία Δημοσίων Υπαλλήλων	Pancyprian Public Servants Trade Union
CY	SYCHTHEM- DEOK/ ΣΥΧΘΕΜ-ΔΕΟΚ	Συντεχνία Χερσαίων, Θαλάσσιων και Εναέριων Μεταφορών ΔΕΟΚ	Land, Sea and Air Transport Trade Union
CZ	OSD	Odborový svaz dopravy	Trade Union of Transport
CZ	OSZL	Odborový svaz zaměstnanců letectví	Trade Union of Employees in Aviation
CZ	CZATCoA	České sdružení řídicích letového provozu	Czech Association of Air Traffic Controllers
CZ	PV OSD	Podnikový výbor OS Dopravy	OS Transport Company Committee
CZ	OOPL	Odborová organizace posádek letadel	Aircraft Crew Trade Union
CZ	CZALPA	České sdružení dopravních pilotů	Czech Airlines Pilots Association ČSA
CZ	CZATSEA	České sdružení techniků řízení letového provozu	Czech Association of Air Traffic Controllers Technicians
DE	ver.di	Vereinte Dienstleistungsgewerkschaft	United Services Union
DE	dbb	Deutscher Beamtenbund und Tarifunion	Civil Servants Union and Wage Union
DE	GdF	Gewerkschaft der Flugsicherung	Union of Air Traffic Controllers
DE	TGL/IGL	Technik Gewerkschaft Luftfahrt/Industriegewerkschaft Luftverkehr	Union Aviation Technology/Industrial Union Aviation
DE	GdP	Gewerkschaft der Polizei	Police Union
DE	VC	Vereinigung Cockpit	Association Cockpit
DE	UFO	Unabhängige Flugbegleiter Organisation	Independent Flight Attendants Organisation
DK	HK Privat	Handels- og kontorfunktionærernes Forbund	HK Private

Member State	Abbreviation	Full name in original language	Full name in English
DK	3F	Fagligt Fælles Forbund	United Federation of Danish Workers
DK	Dansk Metal	Dansk Metal	Danish Metalworkers' Union
DK	DATCoA	Danish Air Traffic Controllers Association	Danish Air Traffic Controllers Association
DK	FPU	Flyvebranchens Personale Union	Flight Personnel Union
DK	DALPA	Dansk Pilotforening	Danish Airline Pilots Association
DK	CUD	Cabin Union Denmark	Cabin Union Denmark
EE	ETTA	Eesti Transpordi- ja Teetöötajate Ametiühing	Estonian Transport and Road Workers Trade Union
EE	EstATCoA	Eesti Lennujuhtide Assotsiatsioon	Estonian Air Traffic Controllers Association
EL	EEEEKE	Ένωση Ελεγκτών Εναέριας Κυκλοφορίας	Greek Air Traffic Controllers Association
EL	HACU/ΣΕΠ	Συλλογος Ελεγκτων Περιοχης – Σεπ	Hellenic Area Controllers Union
EL	OSYPA/ΟΣΥΠΑ	Ομοσπονδία Συλλόγων Υπηρεσίας Πολιτικής Αεροπορίας	Federation of Associations of Hellenic Civil Aviation Authority
EL	ΟΡΑΜ/ΟΠΑΜ	Ομοσπονδία Προσωπικού Αεροπορικών Μεταφορών	Federation of Air Transportation Employees
EL	RACU	Σωματείο Πληρώματος Αεροσκαφών Ryanair	Ryanair Aircraft Crew Union
ES	FSC-CCOO	Federación de Servicios a la Ciudadanía de CCOO	Federation of Services to Citizens of CC.OO.
ES	FeSMC-UGT	Federación de Servicios para la Movilidad y el Consumo de UGT	Mobility and Consumption Services Federation of UGT
ES	FS-USO	Federación de Servicios FS-USO	Federation of Services USO
ES	USCA	Unión Sindical de Controladores Aéreos	Union of Air Traffic Controllers
ES	SEPLA	Sindicato Español de Pilotos de Líneas Aéreas	Spanish Union of Airline Pilots
ES	SITCPLA	Sindicato Independiente de TCP de Líneas Aéreas	Cabin Crew Independent Airline Union
ES	STAVLA	Sindicato de Tripulantes Auxiliares de Vuelo de Líneas Aéreas	Union of Airline Cabin Crew
FI	IAU	Ilmailualan Unioni	Finnish Aviation Union
FI	Pro	Ammattiliitto Pro ry	Trade Union Pro

Member State	Abbreviation	Full name in original language	Full name in English
FI	JHL	Julkisten ja hyvinvointialojen liitto	Trade Union for the Public and Welfare Sectors
FI	SLJY	Suomen Lennonjohtajien Yhdistys	Finnish Air Traffic Controllers Association
FI	YTY	Esimiehet ja Asiantuntijat YTY	Managers and Professionals YTY
FI	AKT/SLSY	Auto- ja Kuljetusalan Työntekijäliitto AKT ry. Ammattiosasto 208. (Suomen Lentoemäntä ja StuerTTYyhdistys SLSY ry)	Finnish Transport Workers' Union AKT/Finnish Cabin Crew Association
FI	FPA	Suomen Lentäjäliitto	Finnish Pilots' Association
FR	SNCTA	Syndicat National des Contrôleurs du Trafic Aérien	National Union of Air Traffic Controllers
FR	USAC	Union Syndicale de l'Aviation Civile-CGT	Civil Aviation Union-CGT
FR	FGTE-CFDT	Fédération Générale Transports et Environnement	General Federation of Transport and Environment
FR	UNSA Transport	UNSA Transport	UNSA Transport
FR	CGT Transports	Fédération CGT des transports	CGT Federation of Transport
FR	CGT Commerce	Fédération CGT Commerce et Services	CGT Retail
FR	CGT Ports et Docks	Fédération CGT des Ports et Docks	CGT Ports and Dockers
FR	CGT Service Public	Fédération CGT des services publics	Public Services CGT
FR	FGT CFTC	Fédération Générale des Transports CFTC	General Transport Federation CFTC
FR	FNEMA-CFE CGC	Fédération Nationale de l'Encadrement des Métiers de l'Aérien	National Federation for the Management of Airline Professions
FR	SUD Aérien	SUD Aérien	SUD Air
FR	FEETS-FO	Fédération FO de l'Équipement des Transports et des Services	FO Federation of Transport and Services Equipment
FR	SNPL	Syndicat national des pilotes de lignes	National Union of Airline Pilots
FR	SPAF	Syndicat de pilotes Air France	Air France Pilots Union

Member State	Abbreviation	Full name in original language	Full name in English
FR	ALTER	Syndicat du Personnel Navigant Technique d'Air France	Air France Aircrew Union
HR	SHSZUZ	Samostalni hrvatski sindikat zaposlenika u zrakoplovstvu	Independent Croatian Trade Union of Employees in Air Transport
HR	ORCA	Organizacija radnika Croatia Airlinesa	Organisation of Workers in Croatia Airline
HR	SZTH	Sindikat zrakoplovnih tehničara Hrvatske	Trade Union of Croatian Air Technicians
HR	SSDUZ	Samostalni sindikat djelatnika u zrakoplovstvu	Independent Trade Union of Employees in Air Transport
HR	CATCoU/ HSSKL	Hrvatski strukovni sindikat kontrolora letenja	Croatian Air Traffic Controllers' Union
HR	SDHKZP	Sindikat djelatnika Hrvatske kontrole zračne plovidbe	Trade Union of Croatian Control's Employees
HR	SRAZ	Sindikat radnika aerodroma Zagreb	Trade Union of Workers at Zagreb Airport
HR	NSSZZLD	Nezavisni strukovni sindikat zaposlenika Zračne luke Dubrovnik	Professional Trade Union of Employees at Dubrovnik Airport
HR	NSSZLSK	Nezavisni strukovni sindikat Zračna luka Split-Kaštela	Independent Professional Trade Union of Split-Kaštela Airport
HR	SKOZ	Sindikat kabinskog osoblja zrakoplova	Trade Union of Cabin Crew
HR	HSPP	Hrvatski sindikat prometnih pilota	Croatian Trade Union of Air Traffic Pilots
HU	RDSZSZ	Repülőtéri Dolgozók és Szolgáltatók Szakszervezete	Trade Union of Airport Workers and Service Providers
HU	RMFSz	Repülőgép-Műszakiak Független Szakszervezete	Aircraft Technicians' Independent Trade Union
HU	LESZ	Légiközlekedési Egyesült Szakszervet	Joint Aviation Workers
HU	LIGOSZ	Légiforgalmi Igazgatási, Gazdasági és Oktatási Szakszervezet	Trade Union of Administration, Economic and Education Workers
HU	IDFSZ	Irányítástechnikai Dolgozók Független Szakszervezete	Independent Trade Union of Control Workers
HU	Control MLISZ	Légiforgalmi Irányítók Szakszervezete	Trade Union of Air Traffic Controllers

Member State	Abbreviation	Full name in original language	Full name in English
HU	HUNALPA	Magyar Közforgalmi Pilóták Egyesülete	Hungarian Airline Pilots' Association
IE	SIPTU	Services Industrial Professional Technical Union	Services Industrial Professional Technical Union
IE	Forsa	Fórsa	Forsa
IE	IALPA	Irish Air Line Pilots' Association	Irish Air Line Pilots' Association
IT	FIT-CISL	Federazione Italiana dei Trasporti – CISL	Italian Federation of Transport – CISL
IT	FILT-CGIL	Federazione Italiana Lavoratori Trasporti – CGIL	Italian Federation of Transport Workers – CGIL
IT	UIL Trasporti	UIL Trasporti	UIL Transport
IT	UGL Trasporto Aereo	UGL Federazione Nazionale Trasporto Aereo	UGL National Federation of Air Transport
IT	Unica	Unione Italiana Controllo e Assistenza al Volo	Italian Union of Flight Control and Assistance
IT	ANPAC	Associazione Nazionale Professionale Aviazione Civile	National Professional Association of Civil Aviation
IT	ANPAV	Associazione Nazionale Professionale Assistenti di Volo	National Professional Association of Flight Attendants
LT	LPSDPS	Lietuvos paslaugų sferos darbuotojų profesinė sąjunga	Lithuanian Service Employees Trade Union
LT	LATCoA	Lietuvos Respublikos skrydžių vadovų	Lithuanian Air Traffic Controllers' Association
LU	SAC-OGBL	Syndicat aviation civile OGB-L	Independent Trade Union Confederation – Luxembourg
LU	LCGB	Fédération luxembourgeoise des syndicats chrétiens	Luxembourg Christian Trade Unions Federation
LU	LGATCo	Guilde luxembourgeoise des contrôleurs de la circulation aérienne a.s.b.l.	Luxembourg Guild of Air Traffic Controllers
LU	ALPL-LCGB	Association luxembourgeoise des pilotes de ligne	Luxembourg Airline Pilots Association
LU	LACA	Luxembourg Approach Controllers Association a.s.b.l	Luxembourg Approach Controllers Association
LV	LAA	Latvijas Aviācijas Arodbiedrība	Latvian Aviation Union
LV	LAAF	Latvijas Aviācijas Arodbiedrību Federācija	Federation of Trade Unions of Civil Aviation

Member State	Abbreviation	Full name in original language	Full name in English
LV	LADA	Latvijas aviācijas dispečeru arodbiedrība	Latvian Air Traffic Controllers Association
MT	GWU	General Workers Union	General Workers Union
MT	MATCoA	Malta Air Traffic Controllers Association	Malta Air Traffic Controllers Association
MT	UHM	Voice of the workers	Voice of the workers
MT	UCC	Union of Cabin Crew Malta	Union of Cabin Crew Malta
MT	ALPA	Airline Pilots Association – Malta	Airline Pilots Association – Malta
NL	FNV Luchtvaart	Federatie voor Nederlandse Vakbonden – Luchtvaart	Federation of Dutch Trade Unions – Aviation
NL	CNV Vakmensen	Christelijk Nationaal Vakverbond Vakmensen	Christian National Employees Movement for Professionals
NL	De Unie	De Unie	The Union
NL	VKP	Vereniging KLM Personeel	Association of KLM Personnel
NL	VNLG	Vereniging het Nederlandse Luchtverkeersleiders Gilde	Dutch Air Traffic Controllers Guild
NL	VPS	Vereniging Personeel Schiphol	Association of Employees at Schiphol
NL	NVLT	NVLT – Nederlandse Vereniging voor Luchtvaart Technici	Dutch Association for Aviation Technicians
NL	VNC	VNC – Vereniging Nederlandse Cabine Personeel	Association for Dutch Cabin Personnel
NL	VNV	VNV – Vereniging Nederlandse Verkeersvliegers	Association of Dutch Flyers
NL	FNV Cabine	Federatie Nederlandse Vakbonden Cabine	Federation of Dutch Trade Unions – Cabin
PL	ZZKRL	Związek Zawodowy Kontrolerów Ruchu Lotniczego	Trade Union of Air Traffic Controllers
PL	KSPTLiOL	Krajowa Sekcja Pracowników Transportu Lotniczego i Obsługi Lotniskowej NSZZ Solidarność	National Section of Air Transport and Airport Service Employees of NSZZ Solidarność
PL	ZZKLW	Związek Zawodowy Kontrolerów Lotniska Warszawa	Trade Union of Warsaw Airport Controllers
PL	ZZNPL	Związek Zawodowy Naziemnego Personelu Lotniskowego	Airport Ground Staff Trade Union

Member State	Abbreviation	Full name in original language	Full name in English
PL	ZZPPiL	Związek Zawodowy Personelu Pokładowego i Lotniczego	Cabin and Flight Crew Trade Union
PL	ZZPK	Związek Zawodowy Pilotów Komunikacyjnych PLL LOT SA	Transport Pilots Trade Union of LOT Polish Airlines
PT	SITAVA	Sindicato dos Trabalhadores da Aviação e Aeroportos	Aircraft Workers' and Airports Union
PT	STHA	Sindicato dos Técnicos de Handling de Aeroportos	Airport Handling Technicians Union
PT	SINCTA	Sindicato de Controladores de Tráfego Aéreo	Air Traffic Controllers Union
PT	SITECSA	Sindicato dos Técnicos de Segurança Aérea	Union of Aviation Safety Technicians
PT	SIMA	Sindicato das Indústrias Metalúrgicas e Afins	Trade Union of the Metallurgical and Allied Industries
PT	SINTAC	Sindicato Nacional dos Trabalhadores da Aviação Civil	National Union of Civil Aviation Workers
PT	SQAC	Sindicato dos Quadros da Aviação Comercial	Commercial Aviation Pictures Union
PT	SINDAV	Sindicato Democrático dos Trabalhadores dos Aeroportos e Aviação (formerly SINDOPA)	Democratic Union of Airport and Aviation Workers
PT	SITEMA	Sindicato dos Técnicos de Manutenção de Aeronaves	Union of Aircraft Maintenance Technicians
PT	SPAC	Sindicato dos Pilotos da Aviação Civil	Union of Civil Aviation Pilots
PT	APPLA	Associação dos Pilotos Portugueses de Linha Aérea	Association of Portuguese Airline Pilots
PT	SIPLA	Sindicato Independente de Pilotos de Linhas Aéreas	Independent Union of Airline Pilots
PT	SNPVAC	Sindicato Nacional do Pessoal de Voo da Aviação Civil	National Union of Civil Aviation Flight Personnel
RO	ATSR	Sindicatul Serviciilor de Trafic Aerian din Romania	Trade Union of Air Traffic Services from Romania
RO	FSA	Federația Sindicatelor Aeroportuare	Airports' Trade Union Federation
RO	SNTT	Sindicatul National Tehnic TAROM	TAROM National Technical Trade Union

Member State	Abbreviation	Full name in original language	Full name in English
RO	FNSA	Federatia Nationala a Sindicatelor din Aeroporturi	National Federation of the Airport Trade Unions
SE	Unionen	Unionen	Unionen
SE	SEKO	Service- och kommunikationsfacket	Service and Communication Union
SE	STF	Svenska Transportarbetareförbundet	Swedish Transport Workers Union
SE	ST	Fackförbundet Statsjänstemannaförbundet	Swedish Union of Civil Servants
SE	Kommunal	Svenska Kommunal arbetarförbundet	Swedish Municipal Workers' Union
SE	SPF	Svensk Pilotförening	Swedish Air Line Pilots Association
SI	SSAL	Svobodni sindikat Aerodrom Ljubljana	Free Trade Union of Aerodrom Ljubljana
SI	SAL	Sindikat družbe Aerodrom Ljubljana	Company Aerodrom Ljubljana Trade Union
SI	SPGAE	Sindikat poklicnega gasilstva Aerodrom Ljubljana	Professional Firefighters Trade Union of Ljubljana Airport
SI	SAITS	Sindikat Aeronavtičnih informacijskih in telekomunikacijskih služb	Aeronautical Information and Telecommunication Services Trade Union
SI	SATS	Sindikat aeronavtične tehnične službe	Aeronautical Technical Services Trade Union
SI	SSKL	Samostojni sindikat kontrolorjev letanja RS	Slovenian Air Traffic Controllers Trade Union
SK	IOZ	Integrovaný odborový zväz	Integrated Trade Union
SK	MOZRLP SR	Moderné odborové združenie riadiacich letovej prevádzky Slovenskej republiky	Modern Trade Union of Air Navigation Employees of the Slovak Republic

Source: Network of Eurofound Correspondents, 2020

Table 128: Trade unions organising aircrew

Member State	Trade unions organising aircrew	Pilots (passenger)	Pilots (freight)	Cabin crew
AT	ACA	yes		
AT	Vida	yes		yes
BE	BBTK-SETCa	yes	yes	yes
BE	ACLVB-CGSLB	yes	yes	yes
BE	ACV Puls	yes	yes	yes
BE	ACV-CSC CNE	yes	yes	yes

Member State	Trade unions organising aircrew	Pilots (passenger)	Pilots (freight)	Cabin crew
BE	BeCA	yes	yes	
CZ	OOPPL	yes		yes
CZ	CZALPA	yes		
DE	ver.di	yes	yes	yes
DE	VC	yes	yes	
DE	UFO			yes
DK	FPU	yes	yes	yes
DK	DALPA	yes		
DK	CUD			yes
EL	RACU			yes
ES	SEPLA	yes	yes	
ES	FSC-CCOO	yes	yes	yes
ES	FeSMC-UGT	yes	yes	yes
ES	FS-USO	yes	yes	yes
ES	SITCPLA			yes
ES	STAVLA			yes
FI	AKT/SLSY			yes
FI	FPA	yes		
FI	YTY	yes		
FI	Pro			yes
FI	SLJY			
FR	FEETS-FO	yes	yes	yes
FR	SNPNC			yes
FR	FNEMA-CFE CGC			yes
FR	UNSA Transport			yes
FR	CGT Transports		yes	yes
FR	FGT CFTC	yes		
FR	SNPL	yes	yes	yes
FR	SPAF	yes		
FR	ALTER	yes		
FR	SNPNAC			yes
FR	FGTE-CFDT	yes	yes	yes
HR	ORCA	yes		yes
HR	SKOZ	yes		yes
HR	HSPP	yes		yes
HU	HUNALPA	yes	yes	
IE	IALPA	yes	yes	
IE	Forsa			yes
IE	SIPTU			yes
IT	FIT-CISL	yes	yes	yes
IT	FILT-CGIL	yes	yes	yes
IT	UIL Trasporti	yes	yes	yes
IT	UGL Trasporto Aereo	yes	yes	yes
IT	ANPAC	yes	yes	yes
IT	ANPAV	yes	yes	yes
LU	SAC-OGBL	yes	yes	yes
LU	ALPL-LCGB	yes	yes	yes
LU	NGL-SNEP	yes	yes	yes
LV	LAA	yes		yes

Member State	Trade unions organising aircrew	Pilots (passenger)	Pilots (freight)	Cabin crew
LV	LA AF	yes		yes
MT	UCC			yes
MT	ALPA	yes		
MT	GWU			yes
NL	VNC			yes
NL	VNV	yes	yes	
NL	FNV Cabine			yes
PL	ZZPPiL			yes
PL	ZZPK PLL LOT SA	yes		
PL	KM NSZZ Solidarność PLL LOT	yes		yes
PT	SPAC	yes	yes	
PT	APPLA	yes	yes	
PT	SIPLA	yes		
PT	SNPVAC			yes
RO	FNSA	yes		yes
SE	Unionen			yes
SE	SPF	yes	yes	
	72 of 166	50	31	51

Note: 17 trade unions (24%) organise only cabin crew, 16 (22%) organise only pilots and 39 (54%) organise both.

Source: Network of Eurofound Correspondents

Table 129: Trade unions organising ATCOs, ATSEP and other ATM employees

Member State	Trade unions organising ATM staff (ATCOs, ATSEP or other ATM employees)	ATCOs	ATSEP	Other ATM staff
AT	Vida	yes	yes	yes
AT	GPF	yes	yes	yes
BE	BBTK-SETCa	yes	yes	yes
BE	ACLVB-CGSLB	yes	yes	yes
BE	ACV Puls	yes	yes	yes
BE	ACV-CSC CNE	yes	yes	yes
BE	BeCA		yes	
BE	BGATCo			yes
BG	FTTUB	yes	yes	yes
BG	FTW-CL Podkrepa			
BG	BATCoU			
CY	CYATCoU	yes		yes
CY	PASYDY	yes		yes
CZ	OSD		yes	
CZ	CZATCoA	yes		yes
CZ	PV OSD			yes
CZ	CZATSEA		yes	yes
DE	ver.di	yes		
DE	dbb	yes	yes	yes
DE	GdF	yes	yes	yes
DK	HK Privat			yes
DK	DATCoA	yes	yes	yes
EE	EstATCoA	yes		
EL	EEEKE	yes		

Member State	Trade unions organising ATM staff (ATCOs, ATSEP or other ATM employees)	ATCOs	ATSEP	Other ATM staff
EL	HACU	yes		
EL	OSYPA		yes	yes
EL	OPAM			yes
ES	FSC-CCOO	yes	yes	yes
ES	FeSMC-UGT	yes	yes	yes
ES	FS-USO	yes	yes	yes
ES	USCA	yes		
FI	YTY	yes		
FI	SLJY	yes		
FR	UNSA Transport			yes
FR	CGT Transports			yes
FR	SNCTA	yes	yes	yes
FR	USAC	yes	yes	yes
FR	FGTE-CFDT	yes	yes	yes
FR	CGT Service Public		yes	yes
HR	SKOZ			yes
HR	HSPP			yes
HR	SHSZUZ			yes
HR	SZTH			yes
HR	CATCoU	yes	yes	
HR	SDHKZP	yes	yes	
HR	SRAZ		yes	yes
HR	NSSZZLD			yes
HR	NSSZLSK			yes
HU	LESZ		yes	
HU	LIGOSZ			yes
HU	IDFSZ		yes	
HU	Control MLISZ			
IE	Forsa	yes	yes	yes
IE	SIPTU			yes
IT	FIT-CISL	yes	yes	yes
IT	FILT-CGIL	yes	yes	yes
IT	UIL Trasporti	yes	yes	yes
IT	UGL Trasporto Aereo	yes	yes	yes
IT	Unica	yes	yes	yes
LT	LATCoA	yes		yes
LU	SAC-OGBL	yes	yes	yes
LU	ALPL-LCGB	yes	yes	yes
LU	LGATCo	yes		
LV	LAAF	yes		
LV	LADA	yes	yes	yes
MT	GWU		yes	yes
NL	FNV Luchtvaart			yes
NL	VNLG	yes		
NL	NVLT		yes	
PL	ZZKRL	yes	yes	yes
PL	ZZKLW	yes		
PT	SITAVA			yes
PT	SINCTA	yes		yes

Member State	Trade unions organising ATM staff (ATCOs, ATSEP or other ATM employees)	ATCOs	ATSEP	Other ATM staff
PT	SITECSA	yes		yes
PT	SIMA			yes
PT	SINTAC			yes
PT	SQAC			yes
RO	ATSR	yes	yes	yes
RO	FSA	yes	yes	yes
SE	ST	yes	yes	yes
SI	SAITS	yes	yes	yes
SI	SATS	yes	yes	yes
SI	SSKL	yes	yes	yes
	83 of 166	5455	447	62

Notes: 34 trade unions (41%) cover all ATM activities and 15 (18%) only organise ATCOs. There are only four trade unions that organise only ATSEP and five trade unions that only cover other ATM staff. The distinction is thus between the 24 trade unions that cover only one of the three ATM activities, the 34 that cover all three and the 25 that cover two of the three.

Source: Network of Eurofound Correspondents

Table 130: Trade unions organising employees of ground service providers

Member State	Trade unions organising employees of ground services providers in airports	Baggage handling	Ticket desk, check-in and boarding	Airport security	Aircraft maintenance	Airport fire services	Services to aircraft, fuel, catering, pushbacks
AT	Vida	yes		yes	yes	yes	yes
AT	GPA-djp		yes				
BE	BBTK-SETCa		yes	yes	yes	yes	yes
BE	ACLVB-CGSLB	yes	yes	yes	yes	yes	yes
BE	ACV Puls		yes	yes	yes	yes	yes
BE	ACV-CSC CNE		yes	yes	yes	yes	yes
BE	BeCA	yes		yes	yes	yes	yes
BE	ABVV-FGTB BTB-UBT	yes		yes	yes	yes	yes
BE	ACV-CSC Transcom	yes		yes	yes	yes	yes
BG	FTTUB	yes	yes	yes	yes		yes
BG	FTW-CL Podkrepa						
CY	OIYK-SEK	yes	yes		yes		yes
CY	PASEY-PEO	yes	yes		yes		yes
CY	SYCHTHEM-DEOK	yes	yes		yes		yes
CZ	OSD	yes	yes	yes		yes	
CZ	OSZL		yes		yes		yes
DE	ver.di	yes	yes	yes	yes	yes	yes
DE	dbb	yes		yes			
DE	TGL/IGL				yes		
DE	GdP			yes			yes
DK	HK Privat		yes	yes			
DK	3F	yes		yes		yes	yes
DK	Dansk Metal				yes		

Member State	Trade unions organising employees of ground services providers in airports	Baggage handling	Ticket desk, check-in and boarding	Airport security	Aircraft maintenance	Airport fire services	Services to aircraft, fuel, catering, pushbacks
EE	ETTA				yes		
EL	OSYPA				yes	yes	
EL	OPAM	yes	yes	yes	yes	yes	yes
ES	FSC-CCOO	yes	yes	yes	yes		
ES	FeSMC-UGT	yes	yes	yes	yes		
ES	FS-USO	yes	yes	yes	yes		
FI	Pro	yes		yes	yes		
FI	IAU	yes	yes	yes	yes		yes
FI	JHL	yes	yes	yes		yes	yes
FR	FEETS-FO	yes	yes	yes	yes		yes
FR	FNEMA-CFE CGC	yes	yes		yes		yes
FR	UNSA Transport	yes	yes	yes	yes	yes	yes
FR	CGT Transports	yes	yes		yes	yes	yes
FR	FGT CFTC	yes	yes				
FR	FGTE-CFDT	yes	yes		yes	yes	yes
FR	CGT Commerce		yes	yes			yes
FR	CGT Ports et Docks	yes	yes		yes		yes
FR	CGT Service Public	yes	yes		yes	yes	yes
FR	SUD Aérien	yes	yes	yes	yes	yes	yes
HR	ORCA				yes		
HR	SHSZUZ	yes	yes		yes		yes
HR	SZTH	yes	yes		yes		yes
HR	SSDUZ				yes		yes
HR	CATCoU				yes		
HR	SDHKZP				yes		
HR	SRAZ	yes	yes	yes			yes
HR	NSSZZLD	yes	yes	yes	yes		
HR	NSSZLSK	yes	yes		yes		yes
HU	RDSZSZ			yes	yes		yes
HU	RMFSz				yes		yes
HU	LESZ	yes	yes	yes			yes
IE	SIPTU	yes	yes	yes	yes	yes	yes
IT	FIT-CISL	yes	yes	yes	yes	yes	yes
IT	FILT-CGIL	yes	yes	yes	yes	yes	yes
IT	UIL Trasporti	yes	yes	yes	yes	yes	yes
IT	UGL Trasporto Aereo	yes	yes	yes	yes	yes	yes
LT	LPSDPS			yes			
LU	SAC-OGBL	yes	yes	yes	yes	yes	yes
LU	ALPL-LCGB	yes	yes	yes	yes	yes	yes
LV	LAA		yes				
LV	LAAF	yes	yes	yes	yes		yes
MT	GWU	yes	yes	yes	yes	yes	yes
NL	FNV Luchtvaart	yes	yes				yes

Member State	Trade unions organising employees of ground services providers in airports	Baggage handling	Ticket desk, check-in and boarding	Airport security	Aircraft maintenance	Airport fire services	Services to aircraft, fuel, catering, pushbacks
NL	CNV Vakmensen	yes	yes	yes	yes		yes
NL	De Unie	yes	yes	yes			yes
NL	VKP	yes	yes		yes		yes
NL	VNLG						
NL	VPS	yes		yes		yes	
NL	NVLT				yes		yes
PL	KSPTLIOL	yes	yes		yes	yes	
PT	SITAVA	yes	yes		yes		yes
PT	STHA	yes	yes		yes		yes
PT	SIMA				yes		
PT	SINTAC	yes	yes		yes		yes
PT	SQAC	yes	yes		yes		yes
PT	SINDAV	yes	yes		yes		yes
PT	SITEMA				yes		
RO	SNTT	yes	yes	yes	yes	yes	
SE	Unionen	yes	yes	yes	yes		yes
SE	SEKO	yes		yes	yes	yes	yes
SE	STF	yes		yes	yes	yes	yes
SE	ST		yes				
SE	Kommunal					yes	
SI	SSAL	yes	yes			yes	yes
SI	SAL	yes	yes			yes	yes
SI	SPGAE	yes	yes			yes	yes
SK	IOZ	yes	yes	yes	yes	yes	yes
	89 of 166	63	62	48	67	37	62

Source: Network of Eurofound Correspondents

Annex 2: Employer organisations

Table 131: Abbreviations and names of employer organisations in the civil aviation sector, 2020

Member State	Abbreviation	Full name in original language	Full name in English
AT	WKÖ-FVALS	Wirtschaftskammer Österreich – Fachverband der Autobus-, Luftfahrt- und Schifffahrtsunternehmen	Austrian Economic Chamber – Association of Bus, Civil Aviation and Shipping Companies
BE	BAR	Board of Airline Representatives	Board of Airline Representatives
BE	BATA	Belgian Air Transport Association	Belgian Air Transport Association
BE	UPTR	Unie van professionele transporteurs en logistieke ondernemers	Union of Professional Transporters and Logistics Operators
BE	FEBETRA	Koninklijke federatie van Belgische transporteurs en logistieke dienstverleners	Royal Federation of Belgian Carriers and Logistics Service Providers
BE	WF-BE	Werkgeversfederatie voor de internationale handel, het vervoer en logistiek	Employers' Federation for International Trade, Transport and Logistics
BG	BULATSA/ДП РВД	Държавно предприятие „Ръководство на въздушното движение	Bulgarian Air Traffic Services Authority
CY	none		
CZ	none		
DE	AGVL	Arbeitgeberverband Luftverkehr	Employer Organisation Aviation
DE	ABL	Arbeitgeberverband der Bodenabfertigungsdienstleister	Employer Organisation for Ground Handling Services
DE	VKA	Vereinigung der kommunalen Arbeitgeberverbände	Confederation of Municipal Employers' Associations
DE	BDLS	Bundesverband der Luftsicherheitsunternehmen	Federal confederation of companies in aviation security
DK	DI	Dansk Industri	Confederation of Danish Industry
EE	ELK	Eesti Lennundusklastar	Estonian Aviation Cluster
EL	AOFA	Ενωση Ξενων Αεροπορικων Εταιριων	Association of Foreign Air Companies
ES	AECA	Asociación Española de Compañías Aéreas	Spanish Association of Air Companies
ES	ALA	Asociación de Líneas Aéreas	Association of Airlines
ES	ASEATA	Asociación de Empresas de Servicios de Asistencia en Tierra en Aeropuertos	Association of Ground Services Companies in Airports
FI	Palta	Palvelualojen työnantajat PALTA Ry	Service Sector Employers PALTA
FR	FNAM	Fédération nationale de l'aviation marchande	National Federation of Merchant Aviation
FR	SAMERA	Syndicat des auxiliaires de la manutention et de l'entretien pour le rail et pour l'air	Union of Handling and Maintenance Auxiliaries for Rail and Air
FR	SCARA	Syndicat des Compagnies Aériennes Autonomes	Autonomous Airline Companies Union

Member State	Abbreviation	Full name in original language	Full name in English
HR	none		
HU	MVVLSz	Magyar Vasúti-, Vízi- és Légiközlekedési Szövetség	Hungarian Federation for Rail, Water and Air Transportation
IE	none		
IT	Assaereo	Associazione Nazionale Vettori e Operatori del Trasporto Aereo	National Association of Vectors and Operators of Air Transport
IT	Assaeroporti	Associazione Italiana Gestori Aeroportuali	Italian Association of Airport Management
IT	Feder catering	Federazione Italiana Catering	Italian Catering Association
IT	Assocontrol	Assocontrol	Assocontrol
IT	Assohandlers	Associazione Nazionale Operatori Servizi Aeroportuali di Handling	National Association of Airport Handling Service Operators
IT	FAIRO	Foreign Airlines Industrial Relations Organization	Foreign Airlines Industrial Relations Organization
LT	none		
LU	none		
LV	none		
MT	none		
NL	WPBL	Werkgeversvereniging Passagiers- en Bagageafhandeling	Employers Association for Passenger and Luggage Handlers
PL	none		
PT	AESH	Associação de Empresas do Sector de Handling	Association of Handling Companies
PT	RENA	Associação das Companhias Aéreas em Portugal	Association of Airlines in Portugal
PT	APPTA	Associação Portuguesa de Transporte e Trabalho Aéreo	Portuguese Air Transport and Work Association
RO	none		
SE	Transportföretagen	Svenska Flygbranschen	Swedish Confederation of Transport Enterprises
SE	Sobona	Sobona – Kommunala företagens arbetsförbund	Sobona Municipal employers' organisation
SE	ALMEGA	Almega Kommunikationsföretagen	Almega Employers' Organisation for the Swedish Service Sector
SE	SAGE	Arbetsgivarverket	Swedish Agency for Government Employers
SE	Svenskt Flyg	Svenskt Flyg	Swedish Air Transport Society
SI	none		
SK	UZvCL SR	Unia zamestnávateľov v civilnom letectve	Civil Aviation Employers' Union

Source: Network of Eurofound Correspondents, 2020

Table 132: Employer organisations with member companies employing aircrew

Member State	Employer organisation organising member companies employing aircrew	Pilots (passenger)	Pilots (freight)	Cabin crew
AT	WKÖ-FVALS	yes		yes
BE	BAR	yes	yes	yes
BE	BATA	yes	yes	yes
DE	AGVL	yes	yes	yes
DK	DI	yes	yes	yes
EE	ELK	yes	yes	yes
ES	ALA	yes	yes	yes
ES	AECA	yes	yes	yes
FI	Palta	yes	yes	yes
FR	FNAM	yes	yes	yes
HU	MVVLsz	yes	yes	yes
IT	Assaereo	yes	yes	yes
LV	LAA	yes	yes	yes
PT	APTTA	yes	yes	yes
SE	Transportföretagen	yes	yes	yes
SE	Svenskt Flyg	yes	yes	yes
EU27	16 employer organisations	16 in 13 Member States	15 in 12 Member States	16 in 13 Member States

Source: Network of Eurofound Correspondents

Table 133: Employer organisations with member companies employing air navigation staff

Member State	Employer organisation organising member companies providing ATM services	ATCOs	ATSEP	Other ATM staff
DE	AGVL		yes	
DK	DI	yes	yes	yes
EE	ELK	yes	yes	yes
FI	Palta	yes	yes	yes
HU	MVVLsz	yes	yes	yes
IT	Assaeroporti		yes	yes
IT	Assocontrol	yes	yes	yes
LV	LAA	yes	yes	yes
RO	AAR	yes	yes	yes
SE	Svenskt Flyg	yes	yes	yes
SE	SAGE*	yes	yes	yes
SK	UZvCL SR	yes	yes	yes
EU27	12 employer organisations	10 in 9 Member States	12 in 10 Member States	11 in 9 Member States

Note: * SAGE is the only employer organisation that represents employers in the ATM sector only, even if there is only one ANSP, and thus one employer in this subsector. However, the ANSP is the Swedish Civil Aviation Administration (LFV), which is affiliated to SAGE. All other employer organisations also represent member companies employing aircrew or ground handling staff. Assocontrol represents ENAV in Italy, which is the ANSP, but also an employer of ground handling staff.

Source: Network of Eurofound Correspondents

Table 134: Employer organisations with member companies providing ground services

Member State	Employer organisation organising member companies providing ground services in airports	Baggage handling	Ticket desk, check-in and boarding	Airport security	Aircraft maintenance	Airport fire services	Services to aircraft, fuel, catering, pushbacks
AT	WKÖ-FVALS	yes	yes	yes	yes	yes	yes
BE	UPTR	yes					
BE	FEBETRA						yes
BE	WF-BE				yes		yes
BG	ASB	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
DE	AGVL		yes		yes		yes
DE	ABL	yes	yes				yes
DE	VKA	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
DE	BDLS	yes		yes			yes
DK	DI	yes	yes	yes	yes	yes	yes
EE	ELK	yes	yes	yes	yes	yes	yes
EL	AOFA	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
ES	ASEATA	yes	yes	yes	yes		yes
FI	Palta	yes	yes	yes	yes	yes	yes
FR	FNAM	yes			yes		yes
FR	SAMERA	yes					yes
FR	SCARA	yes					yes
FR	UAF	yes	yes	yes	yes	yes	yes
HU	MVVLSz	yes	yes	yes	yes	yes	yes
IT	Assocontrol						
IT	Assaeroporti			yes	yes		
IT	Federcatering						yes
IT	Assohandlers	yes	yes	yes	yes	yes	yes
IT	FAIRO	yes	yes	yes	yes	yes	yes
LV	LAA	yes	yes	yes	yes	yes	yes
NL	WPBL	yes	yes	yes	yes		yes
PT	AESH	yes	yes		yes		yes
PT	RENA	yes	yes		yes		yes
RO	AAR	yes	yes	yes	yes	yes	yes
SE	Transportföretagen	yes	yes	yes	yes		yes
SE	Svenskt Flyg	yes	yes	yes	yes	yes	yes
SE	Sobona	yes	yes	yes	yes	yes	yes
SE	ALMEGA	yes	yes	yes	yes		yes
SK	UZvCL SR	yes	yes	yes	yes	yes	yes
EU27	33 employer organisations in 18 Member States	25 in 16 Member States	21 in 16 Member States	19 in 14 Member States	23 in 16 Member States	13 in 11 Member States	28 in 16 Member States

Note: n.a., data not available.

Source: Network of Eurofound Correspondents, 2020

Table 135: Largest three employers per country and their affiliation to at least one of the European-level social partner organisations (ENAA, AIRE, ERA, A4D) in the air transport subsector, 2020

Member State	Name of employer	Total number of employees	Number of pilots	Number of cabin crew	Affiliation to national employer organisation	Collective bargaining involvement
AT	Austrian Airlines	7,000	1,180	2,583	WKÖ-FVALS	SEB
AT	Laudamotion	920	120	250	WKÖ-FVALS	SEB
AT	Eurowings Europe	n.a.	100	180	WKÖ-FVALS	SEB
BE	Brussels Airlines	3,062	n.a.	n.a.	BAR, BATA	MEB + SEB
BE	TUI Airlines Belgium	1,022	n.a.	n.a.	BAR, BATA	MEB + SEB
BE	TNT Express Worldwide	534	n.a.	n.a.	BAR, BATA	MEB + SEB
BG	Bulgarian Air Charter	n.a.	100	220	none	none
BG	Bulgaria Air	n.a.	75	200	none	none
BG	Cargo Air	n.a.	85	15	none	none
CY	Cyprus Airways	100	30	50	none	none
CY	TUS Airways	n.a.	n.a.	n.a.	none	none
CZ	Smartwings	1,230	416	429–804	none	none
CZ	Czech Airlines	750	179	304	SPCR	SEB
CZ	ABS Jets	227	30	18	none	none
DE	Lufthansa	34,754	n.a.	n.a.	AGVL	MEB
DE	Eurowings	9,255	n.a.	n.a.	(AGVL)	SEB
DE	TUI fly	2,400	n.a.	n.a.	none	SEB
DK	SAS Denmark	4,300	n.a.	n.a.	DI	SEB
DK	Sunclass Airlines	1,000	219	567	DI	SEB
DK	DAT A/S	552	140	172	DI	SEB
EE	Regional Jet OÜ	85	n.a.	n.a.	ELK	none
EE	AS Fort Aero	22	n.a.	n.a.	ELK	none
EE	Airest AS	31	n.a.	n.a.	ELK	none
EL	Aegean Airlines	2,815	n.a.	n.a.	SETE, SAAE, HATA	MEB
EL	Olympic Air	n.a.	n.a.	n.a.	SETE	MEB
EL	Ellinair	n.a.	n.a.	n.a.	n.a.	n.a.
ES	Iberia	16,698	1,317	3,309	ALA	SEB
ES	Air Europa	3,605	626	1,773	ALA	SEB
ES	Vueling	3,552	737	2,129	ALA	SEB
FI	Finnair	6,200	1,000–1,100	2,000	Palta	MEB + SEB
FI	Nordic Regional Airlines	620	250	348	Palta	MEB + SEB
FI	Norwegian OSM Fi OY	350	80	250	Palta	SEB
FR	Air France	41,230	3,804	11,843	FNAM	MEB + SEB
FR	HOP!	2,700	700	1,000	FNAM	MEB + SEB
FR	EasyJet	1,500	450	900	none	MEB + SEB
HR	Croatia Airlines	959	140	250	HUP	SEB

Member State	Name of employer	Total number of employees	Number of pilots	Number of cabin crew	Affiliation to national employer organisation	Collective bargaining involvement
HR	Trade Air	67	10	15	none	none
HR	n.a.					
HU	Wizz Air Hungary	907	n.a.	n.a.	none	none
HU	ASL Airlines	81	62	n.a.	none	none
HU	Smartwings Hungary	66	n.a.	n.a.	none	none
IE	Ryanair	7,997*	5,356**	9,729***	none	SEB
IE	Aer Lingus	2,523*	731	1,792	none	SEB
IE	CityJet	140	n.a.	n.a.	none	n.a.
IT	Alitalia	11,600	1,600	3,600	Assaereo	MEB + SEB
IT	EasyJet	3,700	n.a.	n.a.	none	SEB
IT	Ryanair	3,000	n.a.	n.a.	none	SEB
LT	GetJet Airlines	400	n.a.	n.a.	none	none
LT	DAT LT	260	n.a.	n.a.	none	none
LT	Avion Express	150	n.a.	n.a.	none	none
LU	Luxair	1,670	192	250	none	SEB
LU	Cargolux	1,662	570	0	none	SEB
LU	Luxaviation	500	100	0	none	none
LV	Air Baltic Corporation	1,800	400	900	LAA	SEB
LV	SmartLynx Airlines	213	n.a.	n.a.	none	none
LV	RAF-AVIA AS	90	40	0	LAA	none
MT	Air Malta	1,200	120	300	MEA	SEB
MT	Malta Air	200	n.a.	80	n.a.	SEB
MT	Mediavia	200	0	4	MEA, MCCEI	SEB
NL	KLM	25,500	2,500	9,500	none	SEB
NL	Transavia	2,600	650	1,300	none	
NL	TUI	n.a.	n.a.	500	none	
PL	LOT Polish Airlines	3,711	820	1,672	ZPP	SEB
PL	Enter Air	430	n.a.	n.a.	none	none
PL	Sprint Air	n.a.	n.a.	n.a.	none	none
PT	TAP	9,122	855	3,408	none	SEB
PT	SATA	1,361	85	213	none	SEB
PT	PGA	653	172	290	none	SEB
RO	TAROM	1,800	250	300	none	SEB
RO	Blue Air	1,500	150	260	none	none
RO	Wizz Air	n.a.	n.a.	n.a.	none	n.a.
SE	SAS	3,816	560	n.a.	Transportföretagen	MEB + SEB
SE	TUI fly Nordic	n.a.	150	n.a.	Transportföretagen	MEB

Member State	Name of employer	Total number of employees	Number of pilots	Number of cabin crew	Affiliation to national employer organisation	Collective bargaining involvement
SE	Braathens Regional Airlines	1,000	200	300	Transportföretagen	MEB
SI	none					
SK	AirExplore	100–149	n.a.	n.a.	none	none
SK	Go2Sky	100–149	n.a.	n.a.	n.a.	none
SK	Travel Service Slovensko	100–149	n.a.	n.a.	n.a.	none

Notes: MEB, multi-employer bargaining; n.a., data not available; SEB, single-employer bargaining. Dark green cells indicate direct membership of a European-level social partner organisation. Affiliation in parenthesis means indirect membership via a parent company. * Directly employed personnel in EU27; ** employed and contractor pilots in EU27; *** employed and contract agency cabin crew in EU27.

Source: Network of Eurofound Correspondents, 2020

Table 136: Largest three employers per country and their affiliation to at least one of the European-level social partner organisations (ACI, ASA, CANSO, ENAA, AIRE, ERA, A4D) in the ground handling activities subsector, 2020

Member State	Name of employer	Total number of employees	Number of ground staff	Affiliation to national employer organisation	Collective bargaining involvement
AT	Vienna International Airport	3,060 FTEs	3,060 FTEs	WKÖ-FVALS	MEB
AT	Salzburg Airport	364	364	WKÖ-FVALS	MEB
AT	Graz Airport	200	200	WKÖ-FVALS	MEB
BE	SGS Belgium	1,282	n.a.	WF-BE, UPTR, FEBETRA	MEB + SEB
BE	General Services Antwerp	1,160	n.a.	WF-BE, UPTR, FEBETRA	MEB + SEB
BE	Lineas Group	1,000	n.a.	WF-BE, UPTR, FEBETRA	MEB + SEB
BG	Sofia Airport	n.a.	n.a.	none	SEB
BG	Burgas Airport	n.a.	n.a.	none	n.a.
BG	Varna Airport	n.a.	n.a.	none	n.a.
CY	Swissport Cyprus	792	792	none	SEB
CY	LGS Handling	750	750	none	SEB
CY	Hermes Airports	160	160	none	n.a.
CZ	Letiště Praha	2,869	3,004	SP CR	SEB
CZ	Czech Airlines Technics	807	n.a.	none	SEB
CZ	Menzies Aviation	750	750	none	none
DE	Fraport	19,000	16,000	VKA, BDSW, BDLS	MEB
DE	FraSec	4,200	4,200	BDSW, BDLS	MEB
DE	AeroGround	2,800	2,800	VKA, BDSW, BDLS	MEB
DK	SAS Ground Handling	1,800	1,800	DI	MEB + SEB
DK	Aviator Services	n.a.	n.a.	DI	MEB + SEB
DK	Skyways Technics	100	100	DI	MEB + SEB
EE	Tallinn Airport	383	n.a.	ELK	none
EE	AS Tallinn Airport GH	299	299	ELK	none

Member State	Name of employer	Total number of employees	Number of ground staff	Affiliation to national employer organisation	Collective bargaining involvement
EE	Air Traffic Management	225	n.a.	ELK	SEB
EL	Goldair	3,500	n.a.	SETE	SEB
EL	Skyserv	n.a.	n.a.	n.a.	none
EL	Swissport	n.a.	n.a.	n.a.	none
ES	Iberia Airport Services	7,300	7,300	ASEATA	MEB
ES	Groundforce	4,437	4,437	ASEATA	MEB
ES	Swissport	1,806	1,806	none	MEB
FI	Swissport Finland	2,000	1,400	Palta	MEB
FI	Finnair	6,200	1,100	Palta	MEB + SEB
FI	Airpro	1,150	900	Palta	SEB
FR	Groupe Air France	41,230	29,202	FNAM	SEB
FR	Groupe ADP	6,410	6,410	UAF	none
FR	Servair	8,151	8,151	FNAM	MEB + SEB
HR	Croatia Airlines	959	200	HUP	SEB
HR	Zagreb Airport	800	250	none	SEB
HR	Split Airport	600	200	none	SEB
HU	Budapest Airport	1,400	838	MVVLSZ	none
HU	Celebi Ground Handling Hungary	714	714	MVVLSZ	none
HU	Aeroplex	510	510	MVVLSZ	SEB
IE	daa plc	3,500	3,500	none	SEB
IE	Aer Lingus	5,199	2,596	none	SEB
IE	Ryanair	1,876	1,433	none	SEB
IT	Alitalia	11,600	6,400	Assaereo	MEB + SEB
IT	ENAV	3,711	3,711	Assocontrol	MEB + SEB
IT	Aeroporti di Roma	2,605	2,605	Assaeroporti	MEB + SEB
LT	FL Technics	890	n.a.	none	none
LT	Lithuanian Airports	655	n.a.	none	none
LT	Litcargus	368	368	none	none
LU	Luxair	1,670	1,228	none	SEB
LU	Luxembourg Airport	300	n.a.	none	SEB
LU	ANA	n.a.	n.a.	none	none
LV	Riga International Airport	1,273	n.a.	LAA	SEB
LV	Haval Latvia SIA	345	n.a.	LAA	none
LV	ALS	54	n.a.	LAA	none
MT	Air Malta	1,200	450	MEA	SEB
MT	Malta International Airport	n.a.	n.a.	n.a.	SEB
MT	Aviaserve	500	500	n.a.	SEB

Member State	Name of employer	Total number of employees	Number of ground staff	Affiliation to national employer organisation	Collective bargaining involvement
NL	KLM	30,000	14,000	none	SEB until 2018
NL	Swissport	1,500	1,500	WPBL	SEB
NL	DNATA BV	700	700	none	SEB
PL	LS Airport Services	3,000	3,000	none	none
PL	Welcome Airport Services	2,500	2,500	none	none
PL	PPL	1,700	1,700	none	none
PT	TAP	8,145	3,233	RENA	MEB + SEB
PT	Groundforce	2,626	2,626	AESH	MEB + SEB
PT	Portway	1,864	1,864	none	SEB
RO	Bucharest Airport Otopeni	1,500	n.a.	AAR	SEB
RO	Globe Ground Romania	550	550	none	none
RO	Cluj Airport	331	n.a.	AAR	SEB
SE	SAS	3,816	~ 2,000	Transportföretagen	MEB
SE	Swedavia	3,231	3,231	ALMEGA	MEB
SE	Aviator Airport Service	626	626	Transportföretagen	MEB
SI	Fraport Slovenija	456	320	GZS, ZDS	SEB
SI	Portorož Airport	< 20	n.a.	none	none
SI	n.a.				
SK	BTS	611	611	UZvCL SR	MEB + SEB
SK	LPS	500	380	UZvCL SR	SEB
SK	TAT	62	62	UZvCL SR	MEB + SEB

Notes: . FTE, full-time equivalent; MEB, multi-employer bargaining; n.a., not available; SEB, single-employer bargaining. Dark green cells indicate direct membership of a European-level social partner organisation. Light green indicates indirect (via affiliation to a national employer organisation) membership of a European-level social partner organisation.

Source: Network of Eurofound Correspondents, 2020

Annex 3: Supplementary information

Table 137: Impact of COVID-19 on air transport in 2020 (aircrew)

Country	Employment effects in industry/companies	Working conditions and employment regulation	Economic performance of industry/companies
AT	AUA: announced reduction of 1,100 jobs by end 2023; announced 370 (300 pilots and 70 headquarter staff) dismissals in 2020. Ryanair subsidiary Laudamotion: dismissed 94 employees (12 pilots and 82 flight attendants) in June 2020. Level Europa: went bankrupt in June 2020; 200 employees located at the Vienna base lost their jobs.	Laudamotion: concluded a 'crisis' collective agreement providing for temporary wage cuts of up to EUR 300 per month; nevertheless, Ryanair founded Lauda Europe in Malta and fully transferred the Vienna-based business to Lauda Europe, including the existing Laudamotion staff. Future working conditions of the staff concerned are unclear.	Budget airline Level Europe: went bankrupt in June 2020. AUA: state aid of EUR 450 million (EUR 300 million state-guaranteed bank loans and EUR 150 million non-refundable subsidies) has been provided.
BE	Brussels Airlines: 950 jobs were lost in 2020. Ryanair: 178 jobs were lost in 2020.	n.a.	n.a.
BG	No workforce reductions.	n.a.	n.a.
CY	n.a.	n.a.	Cyprus Airways: benefited from government support schemes.
CZ	Czech Airlines: 155 flight staff and 18 ground staff were laid off as of 31 July 2020. Smartwings: 50 pilots, 75 cabin crew and 45 administrative staff were laid off in 2020.	Czech Airlines: from 1 May 2020 basic salaries of pilots were reduced by 60% and those of cabin crew by about 40%. Smartwings: introduced cost-saving measures by offering temporary and part-time contracts; used the 'partial unemployment scheme'.	Smartwings: according to its management, the company needs a loan worth up to EUR 77 million; the government has shown reluctance to rescue the company.
DE	Lufthansa Group: announced a major restructuring programme in July 2020 foreseeing 11,000 job cuts to be realised in Germany by 2023. EasyJet: announced the reduction of the number of flight staff by more than 700 jobs. Eurowing and Condor: announced unspecified number of job cuts.	Many flight staff have benefited from short-time work scheme (flight staff and ground staff altogether about 83,000 employees). Lufthansa: new collective agreements were concluded providing for a non-dismissal clause for remaining cabin crew until 2023 and for the postponement of a rise in collectively agreed wages for pilots to 2021 in exchange for a moratorium on operational redundancies until March 2021.	Lufthansa Group: the German government has provided a bailout package worth EUR 9 billion. Condor: a major bailout package worth EUR 550 million was granted by the government to keep Condor alive until a new investor could take over.
DK	Overall, 1 900 cockpit and cabin crew members were dismissed during 2020. SAS alone dismissed 860 pilots and flight attendants.	Widespread use was made of the possibility of furloughing employees while receiving wage compensation from the state.	Jet Time: went bankrupt. All other airlines underwent internal restructuring including significant dismissals. SAS: has benefited from a special government support package. All airlines made use of a special wage compensation support measure, providing for wage compensation of 75% for each furloughed employee.
EE	n.a.	n.a.	Overall, the sector benefited from general, sector-unspecific state aid programmes – that is, wage subsidies for the employees. Nordica: estimates accumulated losses in 2020 at EUR 57 million.
EL	n.a.	n.a.	Overall, state aid worth EUR 115 million was provided to the air transport sector in 2020. This aid

Country	Employment effects in industry/companies	Working conditions and employment regulation	Economic performance of industry/companies
			includes a series of measures, such as special purpose indemnity, subsidies for social insurance contributions and reduced taxation of flight personnel.
ES	SAS: went bankrupt; 85 employees (pilots and cabin crew) lost their jobs. Overall, there were relatively few redundancies, thanks to ERTE.	Most workers have been covered by ERTE, allowing companies to maintain working conditions. There were some minimal moves of employees to other bases. Regarding collective bargaining, some downward negotiations on wages were ongoing. Ryanair: made pay cuts and attempted dismissals. Plus Ultra: withdrew from collective agreement.	SAS: went bankrupt in 2020. Air Europa: became insolvent; is in the process of being acquired by IAG. Overall, the main state aid has been ERTE (extended to March 2021).
FI	Overall, several hundreds of employees have lost their jobs. Finnair: announced axing 600 jobs in Finland as of October 2020.	Finnair: almost all employees have been temporarily laid off within the Finnish temporary lay-off system; accordingly, employees may reduce working hours by 100%, which enables employers to effectively cut down costs during a fixed-term or open-ended period. Norra: has made use of temporary lay-off system as well; is planning to cancel pay increases and bonus holiday pay and to extend working hours.	OSM Aviation Finland and Norwegian Air Resources Finland (two staffing agencies owned by Norwegian) filed for bankruptcy in June 2020. Finnair: the government has contributed to recapitalisation through subscription of new shares worth EUR 286 million. Loss of turnover between January and June 2020 amounted to EUR 264.4 million.
FR	Air France: announced reduction of workforce by voluntary departure and natural attrition (up to 400 pilots and up to 2,000 cabin crew). HOP! (Air France subsidiary): made about 1,000 job cuts (no dismissals).	Air France: used short-time work scheme.	Air France: the government provided a rescue package worth EUR 7 billion in the form of loans (EUR 4 billion in loans guaranteed by the state and EUR 3 billion in direct loans).
HR	No workforce reductions.	Croatia Airlines: reduced salaries by 15% and cancelled Christmas and Easter bonuses.	n.a.
HU	Wizz Air: about 1,000 employees (19% of total workforce) were laid off in 2020; some others were furloughed.	Wizz Air: income of top management was reduced by 22%, and that of pilots and cabin crew by 14% on average.	Wizz Air: revenue reduced in Q2 2020 from EUR 690 million (2019) to EUR 90 million.
IE	Overall, there were fewer than 500 job losses among flying staff. Cityjet: 260 jobs were lost in 2020.	Ryanair: agreed to temporary pay cuts with cabin crew. Aer Lingus: implemented voluntary severance and career breaks for cabin crew; agreed to reduced hours and pay with pilots, while the airline's cabin crew were on 40–50% pay and hours.	There were no specific sector-related state aid programmes, but wage subsidies have been available across the whole economy.
IT	There were hardly any lay-offs, as they were temporarily suspended as part of the government measures to curb the COVID-19 effects.	Overall, broad use was made of short-time working schemes (there are different wage guarantee funds). Alitalia: wage guarantee fund covers almost 7,000 employees. Ryanair: 290 cabin crew staff are at risk of losing their jobs, since they refuse to approve a contingency agreement entailing a reduction in wages, already agreed upon by pilots.	No cases of bankruptcy are recorded.

Country	Employment effects in industry/companies	Working conditions and employment regulation	Economic performance of industry/companies
LT	GetJet Airlines: laid off about 370 out of 400 employees in 2020. DAT LT and Avion Express: fired about half of their workforces (128 out of 260 and 74 out of 150, respectively).	DAT LT: proposed that some of the fired employees become contractors of the company.	No cases of bankruptcy are recorded.
LU	Overall, in the whole civil aviation sector (mainly Luxair): 600 jobs were lost in 2020. However, a tripartite agreement provides for the possibility of absorbing half of the overstaffing through early retirement schemes. The remaining excess staff will be reclassified by individualised training plans and assigned to other posts in Luxair or to other companies.	Overall (mainly Luxair): reclassification may be associated with loss of wages; however, this will be partially offset by additional days of rest.	There were no cases of bankruptcy, because of state aid.
LV	AirBaltic: announced 678 staff (of a total of 1,712) to be laid off. Smartlynx: announced 86 staff (of a total of 209) to be made redundant.	n.a.	AirBaltic: recorded a loss of EUR 184.8 million in the first half of 2020. State aid worth up to EUR 250 million has been provided in three stages, in the form of recapitalisation; the state's share will increase to 96%.
MT	Some pilots were made redundant in 2020.	For cabin crew, a collective agreement was concluded providing for reduced pay and revised working conditions.	No cases of bankruptcy are recorded.
NL	KLM: will have to reduce its workforce by 5,000. Most job reductions will occur naturally through retirement, but 1,500 will be forced terminations; 300 jobs will be lost among pilots and 300 among cabin crew. Some 2,400 workers will be opting for voluntary departure arrangements.	KLM: moved away from the 'last in, first out' principle for cost-saving reasons.	KLM: received state aid of some EUR 3.4 billion in the form of a loan, of which EUR 2.4 billion is provided by banks, with the government covering the rest and acting as guarantor for 90% of KLM's loan. In exchange, bonuses will not be paid and high earners (pilots!) will have their salaries reduced. The bailout has met heavy criticism from trade unions.
PL	n.a.	LOT: a temporary reduction of salaries was agreed upon for pilots and flight attendants. Ryanair: contracts for cabin and cockpit crew were amended.	LOT: conducts talks with lessors about reducing leasing instalments; applied for public aid worth EUR 1 billion.
PT	TAP: 1,600 redundancies occurred during 2020; most of the redundancies were carried out by non-renewal of fixed-term contracts. 1,000 of the staff affected are cabin crew.	Overall, many companies have made use of the possibility of suspending work contracts and/or imposing short time work. EasyJet: a temporary concession agreement was reached to reduce (labour) costs. Collective bargaining paused in 2020.	TAP: suffered losses of EUR 606 million in the first half of 2020. In July 2020 the government approved a loan to TAP that may reach a maximum of EUR 1.2 billion. Simultaneously, the state raised its share in the company to 72.5%. SATA (Azorean airline): received a loan of EUR 133 million from the Azores.
RO	TAROM: laid off an unspecified number of flight staff. Blue Air: in August 2020 announced lay-off of 10% of its workforce.	TAROM: over 1,000 employees were transferred to 'technical unemployment' (75% of the wage paid by the state, with a ceiling) in spring. In October it happened again, plus a reduced working schedule for the rest of the workforce (4 working days, wage reduction of 20%).	Blue Air: entered a status close to insolvency in July 2020. In June 2020, the government announced the grant of state-guaranteed loans of EUR 64 million and EUR 60 million, respectively, to TAROM and Blue Air.

Country	Employment effects in industry/companies	Working conditions and employment regulation	Economic performance of industry/companies
		Blue Air: all flight staff were temporarily transferred to technical unemployment.	
SE	SAS: in September 2020 announced planned lay-off of 1,900 employees in Sweden, of whom 560 are pilots. Norwegian: notified planned dismissal of all 400 cabin crew members in Sweden in April 2020. Pilot Services Sweden (subsidiary of Norwegian): 250 pilots lost their jobs due to the company's bankruptcy. BRA: in March 2020, 600 employees were dismissed.	n.a.	SAS: management agreed that the Danish and Swedish states would increase their shares in the company; states now hold 29% of the shares. Norwegian: in April 2020, several subsidiaries filed for bankruptcy in Sweden, among which was Pilot Services Sweden (250 pilots affected).
SI	n/a	n/a	n/a
SK	Go2Sky: all 300 employees were made redundant in 2020, due to termination of activities. AirExplore: possibly all 130 employees are to be made redundant; still unclear.	n.a.	Go2Sky: the airline terminated its activities in 2020. Air Explore: management is considering terminating activities; still unclear.
UK	Virgin Atlantic: cut 3,500 jobs in 2020; plans to cut a further 1,150 jobs. British Airways: consulted on cuts of up to 12,000 jobs. Over half of all employees have been furloughed as part of the Coronavirus Job Retention Scheme. EasyJet: proposed to cut 4,500 jobs, including 727 pilot redundancies. Jet2: unspecified number of pilots and cabin crew are to be made redundant. Logan Air: planned to cut 68 jobs.	British Airways: consulted on downgrading the terms and conditions of about 35,000 of its employees. Wants to meet only the minimum statutory obligations on redundancy pay. Income reductions of up to 70% planned. Ryanair: proposed keeping all UK-based cabin crew in return for considerable pay cuts, involving salary reductions of 5–10% over the next four years. Logan Air: some employees were to accept pay cuts of 20% over the winter season 2020/21.	British Airways: estimated loss for the first half of 2020 amounts to GBP 3.8 billion. Accessed GBP 300 million from the COVID-19 Corporate Financing Facility. The UK government has not provided an industry-wide package, but it has waived ATC charges for 14 months. The government's focus has been to offer bespoke support to individual companies. Companies have primarily accessed generic government support schemes, such as the Coronavirus Job Retention Scheme, VAT deferrals and the COVID-19 Corporate Financing Facility. EasyJet: accessed GBP 600 million from the COVID-19 Corporate Financing Facility.

Notes: *n.a.*, data not available; *n/a*, not applicable. No air transport bodies in Slovenia.

Source: Network of Eurofound Correspondents

Table 138: Impact of COVID-19 on air traffic management in 2020

Country	Employment effects in industry/companies	Working conditions and employment regulation	Economic performance of industry/companies
AT	No workforce reductions.	Applied special coronavirus short-time working scheme.	Austro Control: total turnover halved in 2020 (from EUR 300 million in 2019 to EUR 150 million in 2020).
BE	n.a.	Skeyes: implemented a new time registration system and a new telework regime.	Skeyes: accumulated losses of around EUR 100 million in 2020; received state support worth EUR 60 million in July 2020.
BG	No workforce reductions.	n.a.	n.a.
CY	No workforce reductions.	Made significant use of home work.	n.a.

CZ	No workforce reductions.	Air Navigation Services: working hours were reduced; salaries were reduced by 30–50%.	Air Navigation Services: revenues halved compared with 2019; received a non-refundable subsidy of about EUR 19 million.
DE	n.a.	n.a.	n.a.
DK	Naviair: job cuts were only through natural wastage. Incentives were offered for accepting earlier retirement.	Naviair: also made use of wage compensation scheme.	n.a.
EE	ATM: dismissed 40 employees (about 20% of total workforce).	ATM: crisis work schedules were in force in order to minimise contacts between employees.	ATM: was guaranteed protection against the risk of bankruptcy.
EL	No workforce reductions.	HCAA: payments fell into arrears.	n.a.
ES	No workforce reductions.	ENAIRE: agreed on wage reductions in 2020.	ENAIRE: lost turnover estimated at 50% or more.
FI	No workforce reductions.	ANS Finland: temporarily laid off almost all of its 415 employees.	ANS Finland: overall loss of turnover was EUR 38 million in 2020.
FR	No workforce reductions.	DGAC: no reductions in pay and bonuses.	n.a.
HR	No workforce reductions.	n.a.	n.a.
HU	No workforce reductions.	Hungarocontrol: working conditions did not change (all staff are public service employees). Some worked remotely from home.	n.a.
IE	No workforce reductions.	n.a.	n.a.
IT	No workforce reductions.	n.a.	ENAV: net profit was EUR 15.6 million during the first half of 2020 compared with EUR 34.1 million in first half of 2019.
LT	No workforce reductions.	Collective labour agreements were suspended. No adjustment for inflation was made for several years. Fewer hours on duty resulted in lower salary.	Oro Navigacija: used state support for idle time. ATCEUC questions whether there was real state aid or rather some compensation mechanisms at government level.
LU	n.a.	n.a.	n.a.
LV	No workforce reductions.	LGS: temporarily suspended application of the LGS collective agreement.	LGS: obtained recapitalisation worth EUR 6 million.
MT	No workforce reductions.	n.a.	n.a.
NL	No workforce reductions.	LVNL: industrial action was taken to ensure staff got the wage increases established in the sectoral collective agreement.	LVNL: this is financed not by revenue but rather through levies on each flight that goes through Dutch airspace. Income has declined due to fewer flights; hence, it has received extra financing worth EUR 120 million from the ministry to cover its costs.
PL	n.a.	Salaries reduced by 25–30%.	PANSA: revenues dropped significantly. No agreement with trade unions on controlled reduction of wages was reached. Decisions on this matter were made unilaterally by the employer.
PT	No workforce reductions.	No major changes.	NAV Portugal: had no source of revenue because airlines stopped paying fees; made use of a state funding mechanism that guarantees NAV's capacity to act.
RO	No workforce reductions.	An on-call duty roster was introduced. Where possible, telework was used.	n.a.

SE	LFV (state authority): 60 employees at four sites were to be made redundant in 2020.	n.a.	LFV: received financial aid worth EUR 90 million in 2020.
SI	No workforce reductions.	n.a.	Slovenia Control: in 2020, turnover was estimated to decline by 58% compared with 2019.
SK	n.a.	n.a.	n.a.
UK	NATS: confirmed that job losses would be restricted to non-operational staff, with ATCOs protected. It ran a voluntary redundancy programme for non-operational staff, with the expectation that several hundreds of employees would choose to use this programme during 2020.	NATS: furloughed many staff (including controllers) and temporarily suspended pension contributions.	n.a.

Note: n.a., data not available.

Source: Network of Eurofound Correspondents

Table 139: Impact of COVID-19 on ground service activities in 2020

Country	Employment effects in industry/companies	Working conditions and employment regulation	Economic performance of industry/companies
AT	Vienna International Airport: slowly reduced number of ground staff (attrition rather than dismissals).	Applied special coronavirus short-time work scheme.	n.a.
BE	Swissport at Airport Zaventem: went bankrupt; 1,500 employees lost their jobs	n.a.	Swissport at Airport Zaventem: went bankrupt. Aviapartner at Airport Zaventem: received a state loan worth EUR 25 million.
BG	No workforce reductions.	n.a.	n.a.
CY	No seasonal workers were hired during summer 2020, unlike the previous years.	Airports and ground handling providers: used government support schemes for their employees, which provide for a special unemployment benefit set at 60% of an employee's gross salary.	No cases of bankruptcy are recorded.
CZ	Prague Airport: announced reduction of 430 jobs during summer 2020 (about 15% of total staff).	n.a.	Czech airports in general: suffered heavy losses, but obtained no financial state support.
DE	Individual companies have announced major job cuts, such as Fraport, Wisag Aviation and Hamburg Airport, as well as Lufthansa for its ground staff.	Many workers have benefited from short-time working schemes. Amendments of several sector-related collective agreements in the light of the pandemic are currently being negotiated.	Paderborn Lippstadt Airport: filed for insolvency in 2020. Some other airports are likely to follow unless state or regional government aid is granted.
DK	Overall, about 2,150 workers in airport-related services lost their jobs in 2020.	A wage compensation scheme for furloughed employees was widely used. This scheme expired on 29 August 2020; thereafter, many employees were dismissed.	SAS: state aid also benefited ground staff.
EE	Tallinn Airport Group: announced in May 2020 that 111 employees were to be laid off (17% of the total workforce).	n.a.	Tallinn Airport: made use of the national wage subsidy measure worth EUR 2 million.
EL	Lay-offs of unspecified numbers were carried out at Swissport, Skyserv and Goldair. Altogether, more than 1,000 staff are supposed to have been made redundant.	Swissport, Skyserv and Goldair: introduced rotation employment status for many employees, according to which employees work one to four days per week on	n.a.

		rotating shifts, based on operational needs.	
ES	Overall, there were relatively few redundancies, thanks to ERTE. AGA: went bankrupt; 198 redundancies.	Most workers are covered by ERTE, allowing them to maintain their working conditions. There were some minimal moves of employees to other bases.	AGA: went bankrupt in 2020. Overall, the main state aid has been ERTE (extended to March 2021).
FI	Swissport Finland: announced it would dismiss 700 employees. Overall, 1,000–1,500 dismissals in 2020.	Swissport Finland: made large-scale use of temporary lay-offs (90% of total workforce). Finavia: vast majority of workforce were temporarily laid off.	No cases of bankruptcy are recorded. Swissport Finland and Airpro received business cost support from the state treasury (EUR 0.5 million each).
FR	Air France: 6,000 job cuts among ground staff were announced, but no dismissals planned. ADP: planned 700 job cuts among ground staff at airports.	n.a.	n.a.
HR	No workforce reductions. Ground handling companies did not hire seasonal staff during summer 2020 as they usually do.	Overall, some salaries and bonuses decreased. Zagreb Airport: the trade union SRAZ and several companies at Zagreb Airport signed an annex to the pre-existing collective agreement that provides for a postponement of part of regular pay and bonuses. Moreover, temporary 'inactive working hours' were introduced, temporarily exempting staff from work obligations at 70% of their full hourly salaries.	n.a.
HU	Budapest Airport: at least 486 employees were laid off in 2020. Malev Ground Handling: went bankrupt in 2020; all 520 staff were to lose their jobs. Overall, more than 40% of all ground handling staff were dismissed.	Budapest Airport: saw significant reductions in working hours. In aircraft maintenance, many workers were put on 'downtime', when the employee affected is exempt from work obligations (but ready to work on demand), with basic salaries being paid but no extra pay. Some airport staff were given other tasks.	Malev Ground Handling: went bankrupt in 2020. Wizz Air: got some state support for ground handling activities.
IE	There were about 800 permanent job losses in the airport sector, plus up to 500 in ground handling for airlines.	Dublin Airport Authority: moved employees to 80% pay for 80% hours. Shannon Airport: pay was cut by 20% for over 100 staff earning above EUR 30,000 per annum; remainder on three-day week. Aer Lingus: moved most workers on to 50% pay for 50% hours.	There were few bankruptcies. Most state aid was in the form of wage subsidy schemes available to all sectors.
IT	There were hardly any lay-offs, as they were temporarily suspended as part of the government measures to curb the COVID-19 effects.	Broad use was made of short time working schemes (there are different wage guarantee funds). Airports of Italy overall: wage guarantee fund covers about 10,000 employees.	Overall airports of Italy: accumulated losses of more than EUR 1 billion. There are no sector-specific state aid programmes.
LT	Overall, jobs decreased in the subsector by about 15%.	n.a.	No cases of bankruptcy are recorded. Widespread use was made of state support schemes for idle time.
LU	Overall, in the whole civil aviation sector (mainly Luxair): 600 jobs were lost in 2020. However, a tripartite agreement provides for the possibility	Overall (mainly Luxair): reclassification may be associated with loss of wages; however, this will	No cases of bankruptcy because of state aid.

	of absorbing half of the overstaffing through early retirement schemes. The remaining excess staff will be reclassified by individualised training plans and assigned to other posts in Luxair or to other companies.	be partially offset by additional days of rest.	
LV	Riga International Airport: gave notice of 509 employees to be made redundant (out of a total workforce of 1,225). Havas Latvia: gave notice of 242 employees (out of 275) to be made redundant.	Riga International Airport: salaries of the workforce were reduced.	Riga International Airport: state aid worth EUR 54.42 million was granted, increasing the company's share capital; the dividend payment for the previous year was cancelled.
MT	No workforce reductions.	A new collective agreement was concluded on reductions in pay and revised working conditions.	No cases of bankruptcy are recorded.
NL	KLM: of the 1,500 forced employment terminations, 500 affected ground staff and about 400 affected office and administrative workers.	KLM: wants to reduce salaries of ground staff as well; negotiations with social partners ongoing (change of applicable collective agreement).	Transavia: made use of Temporary Emergency Measure for the Preservation of Jobs, which is a cross-sectoral form of state aid for employers. This was to ensure employment for its 2,600 workers.
PL	LOT: lay-offs were made among ground staff. Handling activities were most affected by dismissals (50% fewer jobs).	Overall, salaries reduced, in particular among ground handling staff.	Polish airports: European Commission approved, in October 2020, state aid worth EUR 32 million for compensation for losses due to the pandemic.
PT	TAP: 600 ground staff were made redundant. Portway (handling company): negotiated about the redundancy of 200–300 workers. Groundforce (handling company): negotiated about the redundancy of 810–860 workers in 2020.	Companies have made use of the possibility of suspending work contracts and/or imposing short-time work.	No cases of bankruptcy are recorded.
RO	TAROM: laid off an unspecified number of ground staff. Blue Air: laid off 20% of its ground staff.	Iași International Airport: 50% of workforce were transferred to 'technical unemployment'. Timișoara Traian Vuia International Airport: 94% of its workforce were in 'technical unemployment' in June 2020.	No cases of bankruptcy are recorded. In September 2020, the government approved a state aid scheme for five regional airports (Cluj International, Iași International, Sibiu International, Craiova International and George Enescu International).
SE	Swedavia (state-owned company operating the largest airports in Sweden): announced, in July 2020, it was laying off 800 full-time positions in the second half of 2020.	n.a.	Swedavia: had an operating loss of EUR 65 million in the second quarter of 2020.
SI	Overall, 80 employees out of a total workforce of 470 lost their job.	Fraport Slovenija: implemented a large-scale reorganisation of work, including merging work tasks and reorganising jobs. More than 50% of staff work on a home office basis. The company collective agreement still applies.	Fraport Slovenija: in 2020, turnover decreased by 80% compared with the previous year. Estimated loss in 2020 amounted to EUR 9 million.
SK	n.a.	n.a.	Overall, for the airports some state aid was provided in order to maintain the jobs.

UK	<p>Gatwick Airport: 740 workers lost their jobs in 2020; a further 600 jobs have been earmarked for redundancy.</p> <p>Swissport: was planning to make 4,556 redundancies.</p> <p>Dnata: furloughed a large proportion of its staff.</p> <p>Menzies: announced it was cutting its workforce worldwide by more than half – no more exact information about UK-based employees.</p> <p>Stobart Aviation Services: number of baggage handlers was to be reduced at three airports.</p> <p>London City Airport: planned to cut 236 jobs.</p> <p>Edinburgh Airport: more than 1,000 jobs were at risk.</p> <p>Glasgow Airport: faced around 600 redundancies.</p>	<p>Trade unions reported attacks on workers' pay and conditions, including working hours cut, pay rates reduced and pressure to accept zero-hours-style contracts.</p> <p>Heathrow Airport was looking for pay cuts of 15–20%, affecting about half of the 4,700 staff in engineering, airside operations and security.</p>	<p>Heathrow Airport: suffered losses of GBP 200 million pounds per month.</p> <p>Ground handling companies have called for urgent assistance and provision of cash funding to support their workforces.</p>
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Note: *n.a.*, data not available.

Source: Network of Eurofound Correspondents

Table 140: Distribution of airline operators in the EU27 in 2019–2020 (impact of COVID-19 crisis)

Member State	Number of airline operators, 2020	Number of airline operators, 2019	Difference 2019–2020	Total number of aircraft, 2020	Total number of aircraft, 2019	Difference 2019–2020	% of total seats, 2020	% of total MTOW, 2020
AT	30	29	-1	239	390	-151	4.77	4.18
BE	12	12	0	117	148	-31	2.26	3.85
BG	16	16	0	36	53	-17	0.95	0.76
CY	9	11	-2	10	15	-5	0.06	0.11
CZ	5	7	-2	44	40	+4	0.97	0.72
DE	67	71	-4	506	823	-317	11.07	16.76
DK	16	17	-1	90	117	-27	0.77	1.59
EE	5	5	0	23	26	-3	0.09	0.13
EL	13	13	0	79	102	-23	2.36	1.58
ES	21	25	-4	334	511	-177	11.44	9.31
FI	3	5	-2	52	91	-39	1.76	1.91
FR	36	36	0	348	435	-87	13.16	13.98
HR	2	2	0	11	14	-3	0.29	0.17
HU	8	8	0	103	123	-20	2.20	2.46
IE	18	18	0	356	552	-196	13.69	8.53
IT	22	25	-3	147	244	-97	3.20	3.48
LT	6	6	0	21	30	-9	0.43	0.39
LU	7	8	-1	96	105	-9	0.60	4.76
LV	3	4	-1	29	51	-22	0.94	0.62
MT	31	33	-2	324	252	+72	7.17	6.16
NL	12	12	0	214	234	-20	9.35	9.09
PL	11	11	0	162	179	-17	4.79	3.25
PT	18	18	0	174	202	-28	4.36	4.31
RO	9	10	-1	36	57	-21	1.03	0.68
SE	14	15	-1	154	255	-101	4.32	3.34
SI	3	4	-1	11	16	-5	0.07	0.21
SK	4	5	-1	5	8	-3	0.14	0.09
Total	401	426	27 (-6%)	3,721	5,073	-1,352 (-27%)	~ 100	~ 100

Source: Cirium database and authors' own calculations

Table 141: Organisations' websites and staff members

Organisation	Website	Is there a members-only section?	Number of staff members in the secretariat
ETF	https://www.etf-europe.org/	no	13
ECA	https://www.eurocockpit.be/	yes	16
ATCEUC	http://www.ATCeuc.org/	Under construction	?
EurECCA	https://www.eurecca.eu/	no	?
ERA	https://www.eraa.org/about/overview	yes	10
ASA	https://www.asaworld.aero/	yes	2?
AIRE	https://aire.aero/	yes	4?
ENAA	No public website	–	4
A4D	No public website	–	2?
CANSO	https://canso.org/	yes	22
ACI Europe	https://www.aci-europe.org/	yes	24
ACA Catering	https://www.aca.catering/members/	yes	?
Eurocae	https://www.eurocae.net/	no	?
A4E	https://a4e.eu/	no	0?
ACA	https://www.theaircharterassociation.aero/	yes	?

Source: Network of Eurofound Correspondents, 2020

Annex 4: Three largest airline companies in each Member State

Table 142 below lists the three largest airlines (in terms of workforce) per country. As far as information is available, their respective percentages of the country's total numbers of aircraft, seats and MTOW are indicated. Moreover, the table shows the cumulative proportions of these three indicators for the three largest airlines per Member State put together. In most Member States the three largest airlines together operate a majority of the country's aircraft, seats and MTOW. This corroborates the above argument that there is a high concentration of airline activities among a small number of airline companies.

In several countries, such as Austria, Bulgaria, Denmark, Estonia, Germany, Italy, Lithuania, Luxembourg, the Netherlands, Poland, Portugal, Slovakia and Sweden, airlines other than the three largest in terms of workforce could be identified that also record a significant portion of aircraft/seats/MTOW. In some cases, this is because they run a big business in terms of transport capacities without, however, employing a significant number of workers in these countries. In Austria, for instance, EasyJet Europe officially accounts for more than half of the seats of all the country's airlines. However, this tends to be a statistical artefact, as a result of, in this instance, EasyJet (based in the UK) having established EasyJet Europe at Vienna International Airport in 2016, in order to maintain (after having been equipped with an operating licence by the Austrian authorities) its air rights in the EU27 after Brexit. Although the new EasyJet subsidiary, EasyJet Europe, has been managed from its headquarters in Vienna and has formally been operating under the flag of Austria since 2016 – thus formally being Austria's largest air carrier – the company does not run a base in Austria and de facto has no employees in that country.

Table 142: Largest employers of pilots and aircrew (% of aircraft, seats and MTOW in Member State)

Member State	Largest in terms of workforce			Second largest in terms of workforce			Third largest in terms of workforce			Largest three together			Large in seats or MTOW		
AT	Austrian Airlines			Laudamotion			Eurowings Europe			32	43	42	EasyJet Europe		
	21	27	29	6	9	7	5	7	6				35	51	41
BE	Brussels Airlines			TUI Airlines Belgium			ASL Airlines Belgium (formerly TNT Airways)			76	96	90			
	38	67	47	17	29	16	2	car go	2						
BG	Bulgarian Air Charter			Bulgaria Air			Cargo Air			45	38	49	Holiday Europe		
	15	22	17	13	16	14	1	car go	1			15	25	20	
CY	Cyprus Airways			TUS Airways			Smart jet Aviation			47	87	63			
	13	44	26	20	39	24	1	4	1						
CZ	Smartwings			Czech Airlines			ABS Jets			83	99	91			
	40	65	50	20	30	27	2	4	1						
DE	Lufthansa			Eurowings			TUI fly			52	76	64	Condor		
	36	59	55	13	13	7	3	4	2			7	11	7	
DK	SAS Denmark			Sunclass Airlines			DAT AS			?	64	39	Star Air		
	d	?	?	12	45	30	1	19	9			12	cargo	31	
EE	Regional Jet OÜ			AS Fort Aero			Airest AS			42	?	>	Smartlynx Estonia		
	?	?	?	8	2	5	3	0	1		20	27	91	67	
EL	Aegean Airlines			Olympic Air			Ellinair			66	81	76			
	50	70	66	12	6	5	4	5	5						
ES	Iberia			Vueling			Air Europe			49	65	66			
	17	25	32	24	27	19	9	13	1						
FI	Finnair			Nordic Regional Airlines			Norwegian OSM Fi Oy			93	99	99			
	67	86	90	26	13	9	?	?	?						
FR	Air France			HOP!			EasyJet			68	80	82			
	52	73	78	16	8	4	?	?	?						
HR	Croatia Airlines			Trade Air						10	10	10			
	86	83	83	14	17	17				0	0	0			
HU	Wizz Air Hungary			ASL Airlines			Smartwings Hungary			92	99	98			
	89	98	96	2	0	2	1	1	1						
IE	Ryanair			Aer Lingus			Norwegian Air			84	97	91			
	66	75	65	11	13	17	8	9	9						
IT	Alitalia			EasyJet			Ryanair			46	97	91	Air Italia		
	46	57	53	?	?	?	?	?	?				9	9	

LT	GetJet Airlines			DAT LT			Avion Express			53	85	74	KlasJet		
	30	44	39		1	1	23	40	34				23	13	21
LU	Luxair			Cargolux			Luxaviation			49	73	84	Global Jet Luxembourg		
	19	70	7	24	cargo	75	7	3	2				46	25	15
LV	Air Baltic Corporation			SmartLynx Airlines			RAF-AVIA AS			98	100	99			
	75	75	74	14	24	22	10	1	3						
MT	Air Malta			Vista Jet			Hi Fly Malta			49	75	57			
	23	63	32	23	4	15	3	8	10						
NL	KLM			Transavia (part of KLM)			TUI Fly Netherlands			67	89	86	KLM City Hopper		
	51	70	74	14	14	8	3	4	4				21	11	7
PL	LOT Polish Airlines			Enter Air			Sprint Air			70	72	77	BUZZ (Ryanair)		
	48	53	61	12	18	13	10	1	3				18	27	18
PT	TAP			SATA			PGA (Portugalia)			55	79	70	Euro Atlantic		
	42	69	64	3	2	1	10	8	5				3	7	8
RO	TAROM			Blue Air			d			74	85	83			
	42	36	37	32	41	39		8	7						
SE	SAS			TUI fly Nordic			Braathens Regional Airlines			68	78	76	Norwegian Air Sweden		
	60	72	71	2	3	3	7	3	2				11	17	14
SI	Amelia			Elitavia			Solinair			94	89	97			
	44	72	21	38	17	29	12	0	47						
d	AirExplore			Go2Sky			Travel Service Slovensko			?	65	11	Smartwings Slovakia		
	25	65	11	?	?	?	?	?	?				6	32	5

Notes: Green cells indicate the number of registered aircraft of this company as a proportion of all registered aircraft in the Member State. Light orange cells indicate the passenger seats of this company as a proportion of all aircraft registered in the Member State. Grey cells indicate the MTOW of all aircraft of this company as a proportion of the total MTOW of all aircraft registered in the Member State. The question marks indicate the lack of information or the mismatch between the two different data sources. The selected 3 or 4 largest employers, are companies indicated by the Network of Eurofound Correspondents, sometimes with or sometimes without the numbers of employees. As there are no total numbers of employees, we included CIRUM data on the numbers of operated aircraft, which can be an indicator of the employed pilots and the number of passenger seats that may be an indicator of the employed cabin crew. However, in some cases, the names of the companies indicated by the Network of Eurofound Correspondents did not correspond with the names indicated in the CIRUM database.

Sources: Network of Eurofound Correspondents, Cirium database and authors' own calculations

Analysis of the largest three airline employers per Member State

Table 143 below lists the largest three employers among the airline companies in each Member State. It is important to note, however, that the largest employers are not necessarily congruent with the biggest airline operators (measured in terms of flight transport capacities), since the method of ranking the employers is

based on a company's workforce size. The table includes the size of the workforce (including self-employed and temporary agency workers), disaggregated by pilots and cabin crew staff, and also information on the company's collective bargaining involvement, its affiliation to employer organisations, and the trade union presence on behalf of its workforce (whether the employees are unionised with one or more trade unions). This gives an indication of whether the largest three employers per country in the air transport subsector meet the basic requirements for playing a decisive role in the subsector's industrial relations.

As far as data (or at least estimates) on a country's total number of pilots and cabin crew are available, the percentage of the pilots and cabin crew employed by the three largest airlines per country can be calculated. This gives an indication of the relative importance in terms of workforce of the three largest airlines in each Member State. Together with data on trade union representation in these companies and their affiliation to employer organisations, conclusions can be drawn on the representativeness of these trade unions and employer organisations for the whole transport sector.

For **Error! Not a valid bookmark self-reference.**, in all Member States (except Slovenia, where the only significant airline, Adria Airways, went bankrupt in June 2020) the largest employers among the airlines could be identified, albeit not always the three largest (in a few cases only two).

Table 143: Largest three airline employers for pilots and aircrew in the EU27

Country	Largest airline employers in the sector	Number of employees	Estimated number of pilots (including self-employed, TAW and short-term contract)	d	Estimated number of cabin crew (including self-employed, TAW and short-term contract)	% of cabin crew in the country	Trade union(s) organising employees in the company	Employer organisation(s) to which this employer is affiliated	Type of CB
AT	Austrian Airlines	7,000	1,180	79	2,583	78	Vida, GPA-djp, ACA	WKÖ-FVALS	SEB
AT	Laudamotion	920	120	8	250	6	Vida, GPA-djp, ACA	WKÖ-FVALS	SEB
AT	Eurowings Europe	n.a.	100	7	180	5	Vida, GPA-djp, ACA	WKÖ-FVALS	SEB
BE	Brussels Airlines	3,062	n.a.	n.a.	n.a.	n.a.	ACV-CSC, ABVV-FGTB, ACLVB-CGSLB, BeCA	BAR, BATA	SEB + MEB
BE	TUI Airlines Belgium	1,022	n.a.	n.a.	n.a.	n.a.	ACV-CSC, ABVV-FGTB, ACLVB-CGSLB, BeCA	BAR, BATA	SEB + MEB
BE	TNT Express Worldwide	534	n.a.	n.a.	n.a.	n.a.	ACV-CSC, ABVV-FGTB, ACLVB-CGSLB, BeCA	BAR, BATA	SEB + MEB
BG	Bulgarian Air Charter	Unknown	~ 100	14	220	40	n.a.	none	none
BG	Bulgaria Air	Unknown	~ 75	10	200	36	BULALPA	none	none
BG	Cargo Air	Unknown	~ 85	12	15	3	BULALPA	none	none
CY	Cyprus Airways	~ 100	~ 30	30	~ 50	28	none	none	none
CY	TUS Airways ⁷⁵	Unknown	n.a.	n.a.	n.a.	n.a.	none	none	none
CZ	Smartwings	1,230	416 pilots (24 self-employed, 69 part time)	n.a.	Fluctuating depending on the season: summer season, 804;	n.a.	CZALPA	none	none

⁷⁵ TUS Airways has registered the operation of seven aircraft of 80–100 passengers each. As the company was suspending its flying programme during winter 2020/2021 and, according to information obtained from its website, from April 2020 would be only operating the route Larnaca to Tel Aviv, it is not possible to estimate the company's number of employees. It should also be noted that it was not possible to interview any of the company's representatives.

Country	Largest airline employers in the sector	Number of employees	Estimated number of pilots (including self-employed, TAW and short-term contract)	d	Estimated number of cabin crew (including self-employed, TAW and short-term contract)	% of cabin crew in the country	Trade union(s) organising employees in the company	Employer organisation(s) to which this employer is affiliated	Type of CB
					winter season, 429; no self employed or TAW; 32 part time				
CZ	Czech Airlines	750	179 (no self-employed or TAW)	n.a.	304 (no self-employed or TAW)	n.a.	OOLP; CZALPA CSA; OSD; OSZL	SPCR	SEB
CZ	ABS Jets	227, of whom 191 in Czechia	30	n.a.	18	n.a.	none	none	none
DE	Lufthansa	34,754	4,920	42	21,053	n.a.	ver.di (cabin crew), UFO (cabin crew), VC Vereinigung cockpit (pilots)	AGVL	SEB
DE	Eurowings	9,255	1,065	9	1,751	n.a.	ver.di (cabin crew), UFO (cabin crew), VC Vereinigung cockpit (pilots)	(AGVL)	SEB
DE	TUI fly	2,400	n.a.	n.a.	n.a.	n.a.	ver.di (cabin crew), UFO (cabin crew), VC Vereinigung cockpit (pilots)	none	SEB
DK	SAS Denmark	4,300	n.a.	n.a.	n.a.		DALPA, CUD (CAU)	DI	SEB
DK	Sunclass Airlines	1,000	219	11	567	25	FPA, HK Privat, Dansk Metal, 3F, DALPA	DI	SEB
DK	DAT A/S	552	140	7	172	7	FPA, HK Privat, Dansk Metal, 3F	DI	SEB
EE	Regional Jet OÜ	85 (official data; according to the Estonian Civil Aviation administration)	n.a.	n.a.	n.a.	n.a.	none	ELK	none

Country	Largest airline employers in the sector	Number of employees	Estimated number of pilots (including self-employed, TAW and short-term contract)	d	Estimated number of cabin crew (including self-employed, TAW and short-term contract)	% of cabin crew in the country	Trade union(s) organising employees in the company	Employer organisation(s) to which this employer is affiliated	Type of CB	
		there are also 436 TAW pilots/cabin crew)								
EE	AS Fort Aero	22	n.a.	n.a.	n.a.	n.a.	none	ELK	none	
EE	Airest AS	31	n.a.	n.a.	n.a.	n.a.	none	ELK	none	
EL	Aegean Airlines	2,815 employees (including those of Olympic Air): 1,524 in flight operations; 133 external associates worked as flight deck crews (contracted pilots) The numbers were provided for both companies together – Since 2013 they are part of the same group and report numbers all together for the entire group, even though they are still two airlines						Aegean Airlines Employees Association (inactive since 2013)	SETE, SAAE, HATA	MEB
EL	Olympic Air							Unknown	SETE (via Aegean Airlines)	MEB
EL	Ellinair	n.a.	n.a.	n.a.	n.a.	n.a.	Unknown	Unknown	Unknown	
ES	Iberia	16,698 (2018)	1,317	21	3,309	33	SEPLA (pilots), UGT, CCOO, USO, SITCPLA (cabin crew)	ALA	SEB	
ES	Air Europa	3,605 (2018)	1,218	19	948	9	SEPLA, UPPA (pilots), USO, SITCPLA, CCOO (cabin crew)	ALA	SEB	
ES	Vueling	3,552 (2019)	737 according to the SEB 2014 data	12	2,129 according to the SEB 2017 data	21	SEPLA (pilots), CCOO, STAVLA (cabin crew)	ALA	SEB	
FI	Finnair	6,200	1,000–1,100	63	2,000	60	FPA/YTY, AKT/SLSY	Palta	MEB + SEB	
FI	Nordic Regional Airlines	620 (Kauppalehti Yrityshaku 2018)	250	16	348	10	FPA/YTY, AKT/SLSY	Palta	MEB + SEB	
FI	Norwegian OSM Fi Oy	350 (according to Palta)	80	5	250	7	FPA/YTY, Pro	Palta	SEB	

Country	Largest airline employers in the sector	Number of employees	Estimated number of pilots (including self-employed, TAW and short-term contract)	d	Estimated number of cabin crew (including self-employed, TAW and short-term contract)	% of cabin crew in the country	Trade union(s) organising employees in the company	Employer organisation(s) to which this employer is affiliated	Type of CB
FR	Air France	41,230	3,804	42	11,843	63	CFDT, CFTC, CGT, FO, CFE-CGC, UNSA, SNPL, ALTER, SPAf; SNGAF	FNAM	SEB + MEB
FR	HOP!	2,700	700	8	1,000	5	CFDT, CFTC, CGT, FO, CFE-CGC, UNSA, SNPL, SNGAF	FNAM	SEB + MEB
FR	EasyJet	1,500	450	5	900	5	CFDT, CFTC, CGT, FO, CFE-CGC, UNSA, SNPL, SNGAF	None	SEB + MEB
HR	Croatia Airlines	959 (2018)	140	60	250 during the tourist season (100 out of season)	83 (during tourist season)	ORCA, SHSZUZ, SKOZ, HSPP	HUP	SEB
HR	Trade Air	67	10	6	15	5	none	none	none
HU	Wizz Air Hungary	907	n.a.	n.a.	n.a.	n.a.	none	none	none
HU	ASL Airlines	81	62	d	n.a.	n.a.	none	none	none
HU	Smartwings Hungary	66	n.a.	n.a.	n.a.	n.a.	none	none	none
IE	Ryanair	7,997 (directly employed pilots and cabin crew in EU, including UK)	5,356 (employed and contractor pilots in EU including UK)	n.a.	9,729 (employed and contract agency cabin crew in EU including UK)	n.a.	Fórsa (cabin crew) and IALPA (pilots) in Ireland only	A4D	SEB
IE	Aer Lingus	2,523 (directly employed pilots and cabin crew in EU including UK)	731	n.a.	1,792	n.a.	Fórsa (cabin crew) and IALPA (pilots)	A4D (through parent company IAG)	SEB
IE	City Jet	140 after COVID-19 (before 400)	n.a.	n.a.	n.a.	n.a.	n.a.	none	n.a.

Country	Largest airline employers in the sector	Number of employees	Estimated number of pilots (including self-employed, TAW and short-term contract)	d	Estimated number of cabin crew (including self-employed, TAW and short-term contract)	% of cabin crew in the country	Trade union(s) organising employees in the company	Employer organisation(s) to which this employer is affiliated	Type of CB
IT	Alitalia	11,600	1,600	n.a.	3,600	n.a.	FIT-CISL, FILT-CGIL, UIL Trasporti, UGL Trasporto Aereo, ANPAV, ANPAC, USB	Assaereo	MEB + SEB
IT	EasyJet	3,700	n.a.	n.a.	n.a.	n.a.	FILT-CGIL, FIT-CISL, UIL Trasporti (signatory parties of the company-level collective agreement). Unclear whether other organisations have members among the company's workforce	none	SEB
IT	Ryanair	3,000	n.a.	n.a.	n.a.	n.a.	FIT-CISL, ANPAC and ANPAV. Unclear whether other organisations have members among the company's workforce	none	SEB (only with FIT-CISL, ANPAC and ANPAV)
LT	GetJet Airlines	400	n.a.	n.a.	n.a.	n.a.	none	none	none
LT	DAT LT	260	n.a.	n.a.	n.a.	n.a.	none	none	none
LT	Avion Express	150	n.a.	n.a.	n.a.	n.a.	none	none	none
LU	Luxair	1,670	192	n.a.	250	n.a.	LCGB, OGB-L	n.a.	SEB
LU	Cargolux	1,662	570	n.a.	0	n.a.	LCGB, OGB-L	none	SEB
LU	Luxaviation	500 (Estimate)	100 (estimate)	n.a.	0 (estimate)	n.a.	none	none	none
LV	Air Baltic corporation	1,581	400	n.a.	900	n.a.	Latvian Aviation Union, Federation of Trade Unions of Civil Aviation	Latvian Aviation Association	SEB

Country	Largest airline employers in the sector	Number of employees	Estimated number of pilots (including self-employed, TAW and short-term contract)	d	Estimated number of cabin crew (including self-employed, TAW and short-term contract)	% of cabin crew in the country	Trade union(s) organising employees in the company	Employer organisation(s) to which this employer is affiliated	Type of CB
LV	SmartLynx Airlines	213	n.a.	n.a.	n.a.	n.a.	none	Latvian Aviation Association	none
LV	RAF-AVIA AS	90	40	n.a.	0	n.a.	none	Latvian Aviation Association	none
MT	Air Malta	~ 1,200	~ 120	n.a.	~ 300	n.a.	UCC, ALPA	MEA (however, not sector specific)	Separate negotiations are carried out with every union separately. SEB
MT	Malta Air	200	n.a.	n.a.	80	n.a.	GWU	Unknown	SEB
MT	Mediavia	200	0	n.a.	4	n.a.	GWU	MEA, MCCEI	SEB
NL	KLM	33,000	2,500	n.a.	9,500	n.a.	VNC, VNV, FNV Cabine, VKP	KLM/A4D	SEB
NL	Transavia (daughter company KLM)	2004 in 2017	650 in 2018	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
NL	TUI Group	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
PL	LOT Polish Airlines	3,711 (including self-employed)	820	n.a.	1,672	n.a.	ZZPPiL, ZZPK, NSZZ Solidarność, OPZZ, Trade Union of LOT Polish Airlines Employees	ZPP (cross-sectoral)	SEB
PL	Enter Air	430	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
PL	Sprint Air	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
PT	TAP	9,122 (in 2018)	855 (pilots covered by SEB 2018)	n.a.	3408 (cabin crew covered by SEB 2018)	n.a.	SPAC (pilots), SNPVAC (cabin crew)	n.a.	1 SEB with SPAC; 1 SEB with SNPVAC
PT	SATA	1,361 (in 2017)	85 (pilots covered by SEB 2018)	n.a.	213 (cabin crew covered by SEB 2018)	n.a.	SPAC (pilots), SNPVAC (cabin crew)	n.a.	1 SEB with SPAC; 1 SEB with SNPVAC

Country	Largest airline employers in the sector	Number of employees	Estimated number of pilots (including self-employed, TAW and short-term contract)	d	Estimated number of cabin crew (including self-employed, TAW and short-term contract)	% of cabin crew in the country	Trade union(s) organising employees in the company	Employer organisation(s) to which this employer is affiliated	Type of CB
PT	PGA	653 (in 2018)	172 (pilots covered by SEB 2018)	n.a.	290 (cabin crew covered by SEB 2018)	n.a.	SIPLA (pilots), SNPVAC(cabin crew)	n.a.	1 SEB with SIPLA; 1 SEB with SNPVAC
RO	TAROM	1,800	~ 250 pilots, most of them employees with full contracts	n.a.	~ 300	n.a.	SNTT, ETOS Trade Union, SUT, SETA, SIOT, SPNT, SIBR, SPLR	none	SEB
RO	Blue Air	1,500	~ 100	n.a.	n.a.	n.a.	Blue Air Airline Management Solutions Pilots Trade Union, Blue Air Airline Management Solutions Technical Staff Trade Union, Blue Air Airline Management Solutions Cabin Crew Trade Union ⁷⁶	none	SEB
SE	SAS	10,324 in SE, DK and NO	1,900 in SE, DK and NO; 500 in Sweden	n.a.	3,600 in SE, DK and NO	n.a.	Unionen, SPF	Transportföretagen	MEB + SEB
SE	TUI fly Nordic	1,600 in SE, NO, FI and DK	150	n.a.	n.a.	n.a.	Unionen, SPF	Transportföretagen	MEB
SE	Braathens Regional Airlines	1,000	200	n.a.	300	n.a.	Unionen, SPF	Transportföretagen	MEB
SI	The only airline company, Adria Airways, which employed 558 workers, went bankrupt in June 2020								
SK	AirExplore	100–149	n.a.	n.a.	n.a.	n.a.	none	none	none
SK	Go2Sky	100–149	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.

⁷⁶ These are company trade unions that were not taken into consideration in this study.

Country	Largest airline employers in the sector	Number of employees	Estimated number of pilots (including self-employed, TAW and short-term contract)	d	Estimated number of cabin crew (including self-employed, TAW and short-term contract)	% of cabin crew in the country	Trade union(s) organising employees in the company	Employer organisation(s) to which this employer is affiliated	Type of CB
SK	Travel Service Slovensko	100–149	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
UK	British Airways	45,000	3,900	n.a.	16,500	n.a.	BALPA (pilots), Unite (cabin crew)	none	SEB
UK	EasyJet	14,000	4,000	n.a.	8,500	n.a.	BALPA (pilots), Unite (cabin crew)	A4D	SEB
UK	Virgin Atlantic	8,571	917	n.a.	3,343	n.a.	BALPA (pilots), Unite (cabin crew)	none	SEB

Notes: CB, collective bargaining; MEB, multi-employer bargaining; n.a., data not available; SEB, single-employer bargaining; TAW, temporary agency work.

Source: Network of Eurofound Correspondents, 2020

Types of airlines among the largest three airline employers in each Member State

In different Member States the largest three aviation companies in terms of the number of employees are of different types.

- The network carriers are most often the largest (in 18 Member States).
- The LCCs are next most often the largest, and very frequently the second largest.
- Leisure airlines are the second largest in five Member States.
- In the countries without network carriers or LCCs, charter aviation companies or corporate air companies can be among the three airlines that employ the most pilots or cabin crew.

Table 144: Type of airlines among the largest in each per Member State

Member State	Largest	Second largest	Third largest
AT	Austrian Airlines	Laudamotion	Eurowings Europe
BE	Brussels Airlines	TUI Airlines Belgium	ASL Airlines Belgium
BG	Bulgarian Air Charter	Bulgaria Air	Cargo Air
CY	Cyprus Airways	TUS Airways	SmartJet Aviation
CZ	Smartwings	Czech Airlines	ABS Jets
DE	Lufthansa	Eurowings	TUI fly
DK	SAS Denmark	Sunclass Airlines	DAT AS
EE	Regional Jet OÜ	AS Fort Aero	Airest AS
EL	Aegean Airlines	Olympic Air	Ellinair
ES	Iberia	Vueling	Air Europe
FI	Finnair	Nordic Regional Airlines	Norwegian OSM Fi Oy
FR	Air France	HOP!	EasyJet
HR	Croatia Airlines	Trade Air	
HU	Wizz Air Hungary	ASL Airlines	Smartwings Hungary
IE	Ryanair	Aer Lingus	Norwegian Air
IT	Alitalia	EasyJet	Ryanair
LT	GetJet Airlines	DAT LT	Avion Express
LU	Luxair	Cargolux	Luxaviation
LV	Air Baltic corporation	SmartLynx Airlines	RAF-AVIA AS
MT	Air Malta	Vista Jet	HiFLy Malta
NL	KLM	Transavia (daughter company of KLM)	TUI Group (TUI fly Netherlands)
PL	LOT Polish Airlines	Enter Air	Sprint Air
PT	TAP	SATA	PGA – Portugalia Airlines
RO	TAROM	Blue Air	Just Us Air
SE	SAS	TUI fly Nordic	Braathens Regional Airlines
SI	Amelia	Elitavia	Solinair
SK	AirExplore	Go2Sky	Travel Service Slovensko
Main	17 Member States	2 Member States	0 Member States
Low cost	2 Member States	7 Member States	3 Member States
Regional	2 Member States	5 Member States	4 Member States
Cargo	0 Member States	2 Member States	3 Member States
Leisure	2 Member State	6 Member States	4 Member States
Charter	3 Member State	d	2 Member States
Corporate/ private	1 Member States		10 Member States

Note: Definitions of the different types of airline companies are in section 5.2.

	Main airlines – network carriers
	Low-cost carriers
	Regional
	Cargo
	Leisure
	Charter
	Corporate/private

Source: *Network of Eurofound Correspondents, Cirium database and authors' own calculations*

Annex 5: Network of Eurofound Correspondents

Table 145: Correspondents who contributed to the study

Country	Correspondent(s)	Organisation
Austria	Georg Adam	FORBA
Belgium	Dries Van Herreweghe	HIVA–KU Leuven
Bulgaria	Ekaterina Ribarova	Institute of Social and Trade Union Research (ISTUR)
Croatia	Predrag Bejakovic and Irena Klemencic	Institute of Public Finance (IPF)
Cyprus	Pavlos Kalosinatos	Cyprus Labour Institute (INEK-PEO)
Czechia	Petr Pojer	Research Institute for Labour and Social Affairs
Denmark	Carsten Jorgensen	FAOS, University of Copenhagen
Estonia	Ingel Kadarik	Praxis Centre for Policy Studies
Germany	Sandra Vogel	German Economic Institute
	Birgit Kraemer	Institute for Economic and Social Research, Hans Boeckler Foundation
Greece	Penny Georgiadou	GSEE Labour Institute
Finland	Rasmus Firon	Oxford Research AB
France	Frédéric Turlan	IR Share
Hungary	Nóra Krokovay	Kopint-Tárki Institute for Economic Research
Ireland	Andy Prendergast	IRN Publishing
Italy	Anna Mori	Department of Social and Political Sciences, University of Milan
Latvia	Krišs Karnītis	EPC Ltd
Lithuania	Inga Blaziene	Lithuanian Social Research Centre
Luxembourg	Franz Clément	Luxembourg Institute of Socio-Economic Research (LISER)
Malta	Charles Tabone	University of Malta
Netherlands	Amber van der Graaf	Panteia BV
Poland	Maciej Pańków	Foundation Institute of Public Affairs
Portugal	Reinhard Naumann	Friedrich Ebert Foundation (Lisbon)
Romania	Victoria Stoiciu and Nicoleta Voicu	European Institute of Romania
Slovakia	Ludovit Cziria	Institute for Labour and Family Research
Slovenia	Barbara Lužar	Faculty of Social Sciences, University of Ljubljana
Spain	Alejandro Godino	Institute for Labour Studies, Universitat Autònoma de Barcelona
Sweden	Sirin Celik	Oxford Research AB
United Kingdom	Claire Evans	Warwick Business School

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This study provides information allowing for an assessment of the representativeness of the actors involved in the European sectoral social dialogue committee for the civil aviation sector. Their relative representativeness legitimises their right to be consulted, their role and effective participation in the European sectoral social dialogue and their capacity to negotiate agreements.

The aim of Eurofound's studies on representativeness is to identify the relevant national and European social partner organisations in the field of industrial relations in the EU Member States. This study identifies ETF, ECA and ATCEUC – representing employees – and ENAA, A4D, AIRE, ERA, CANSO, ACI Europe and ASA – representing employers – as the representative European-level social partner organisations in the civil aviation sector.

The European Foundation for the Improvement of Living and Working Conditions (Eurofound) is a tripartite European Union Agency established in 1975. Its role is to provide knowledge in the area of social, employment and work-related policies according to Regulation (EU) 2019/127.

