FACTSHEET

Eurofound

Representativeness of the social partner organisations: Civil aviation sector

Key findings

Introduction

Purpose, objectives and methodology

This short report examines the process of assessing the representativeness of the actors involved in the European sectoral social dialogue committee for the civil aviation sector. It summarises the findings from a comprehensive study on representativeness in the the civil aviation sector (referred to here as 'the main report').[1] Based on the assessment of their representativeness, the European Commission can decide which organisations should be retained or added to the list of organisations entitled to consultation under Article 154 of the Treaty on the Functioning of the European Union (TFEU). In the case of European social partner agreements, required to be implemented by means of a Council directive as set out in Article 155 TFEU, the legislative powers granted to European social partners are based on their representativeness.

While participation in a European sectoral social dialogue committee (ESSDC) is based on the autonomy of the European associations on the committee, this representativeness study can also provide some guidance for future decision-making on this. Moreover, for future capacity-building initiatives, the national actors listed that are not yet represented on the committee may offer valuable guidance.

The representativeness of an organisation is assessed on three criteria, as specified in European Commission Decision 98/500/EC of 1998.[2] The first is its sector-relatedness, the part of the sector organised by the national member organisations of the European association. The second is the degree to which these national member organisations have the capacity to negotiate the working conditions in the sector, together with the number of Member States where the European associations have affiliates that are considered representative and involved in collective bargaining. The third is effective participation in the ESSDC, measured through the capacity of the European associations to negotiate and fully represent their national member organisations, and their attendance at the ESSDC meetings.

This study is based on information gathered in the 27 EU Member States by the Network of Eurofound Correspondents, using a detailed questionnaire. This was internally revised and reworked by Eurofound, after which a report was drafted. In November 2021, the information on the specific organisations was shared with the European social partner organisations for feedback. In June 2022, the final draft of this study was formally evaluated by the Eurofound Advisory Committee on Industrial Relations, and by all European associations mentioned in this report. This tripartite approach, including several feedback and commenting opportunities, should ensure the accuracy of the study and the acceptance of the findings by all those involved in the sector.

The study assesses both the individual and collective representativeness of the ten European-level social partner organisations in the civil aviation sector deemed to be representative: the European Transport Workers' Federation (ETF), the European Cockpit Association (ECA) and the Air Traffic Controllers European Unions Coordination (ATCEUC) – representing employees – and the European Network Airlines Association (ENAA), Airlines for Dialogue (A4D), Airlines International Representation in Europe (AIRE), the European Regional Airlines Association (ERA), the Civil Air Navigation Services Organisation (CANSO), Airports Council International Europe (ACI Europe) and the Airport Services Association (ASA) – representing employers.

1 See Representativeness of the European social partner organisations: Civil aviation sector

2 Commission Decision (98/500/EC) of 20 May 1998 on the establishment of Sectoral Dialogue Committees promoting the dialogue between the social partners at European level.

Table 1: Organisations participating in the civil aviation ESSDC

Representing employees	Representing employers
European Transport Workers' Federation (ETF) – all kinds of workers in all activities and subsectors	European Network Airlines Association (ENAA) – network carriers (previously called Airline Coordination Platform (ACP))
	Airlines International Representation in Europe (AIRE) – leisure airlines
European Cockpit Association (ECA) – pilots	European Regions Airline Association (ERA) – regional airlines and cargo
	Airlines for Dialogue (A4D) – low-cost carriers and network carriers
Air Traffic Controllers European Unions Coordination (ATCEUC)	Airports Council International Europe (ACI Europe) – airports
	Airport Services Association (ASA) – ground services
	Civil Air Navigation Services Organisation (CANSO) – air navigation service providers

Note: *Colour coding: organisations shaded in yellow are included on the list of organisations to be consulted under Article 154 TFEU. The others participate in the ESSDC, but are not included on that list.*
Source: *European Commission (undated)*

European social dialogue for the civil aviation sector

The civil aviation sector social dialogue started as a joint committee in 1990, based on European Commission Decision 90/449/EEC of 30 July 1990. The civil aviation ESSDC replaced the 1990 joint committee, according to Article 7 (1) (b) of Commission Decision 98/500/EC. Since 2003, the joint committee has organised its work through three subsector working groups, one for aircrew, air traffic management activities and ground service activities.

The European social partner landscape in the civil aviation sector includes three European trade union organisations and seven European associations representing the different types of employers in the sector (Table 1). In the early years of European social dialogue, the European Transport Workers' Federation (ETF) was the only European trade union organisation. In 2000, the European Cockpit Association (ECA), representing pilots, joined the ESSDC. The Air Traffic Controllers European Unions Coordination (ATCEUC) joined in 2009. ETF and ECA appear as European organisations on the list of European associations that are entitled to consultation under Article 154 TFEU. ATCEUC is not included on that list.

There are four European employer organisations representing different airline companies: ENAA, A4D, ERA and AIRE. The Airline Coordination Platform (ACP) was established in 2017, representing some network carriers, such as Lufthansa, the Air France–KLM group, SAS, Croatia Airlines and TAP, among others. ACP was renamed the European Network Airlines Association (ENAA) in 2022. Airlines for Dialogue (A4D) represents the interests of the Ryanair Group (including Ryanair, Lauda Air, Malta Air and Buzz), IAG (including Iberia, British Airways, Vueling and Aer Lingus), the Norwegian Group, EasyJet and Finnair. Both ENAA and A4D have been accepted to participate in the civil aviation sector ESSDC since 2019. They are not yet recognised as representative European employer organisations by the European Commission, and therefore not included on the list of European associations that are entitled to consultation under Article 154 TFEU.

Two other European associations, representing mainly regional and leisure airline companies, have been part of the ESSDC for many years and are both recognised by the European Commission and included on the list of organisations consulted under Article 154 TFEU. These are the European Regional Airlines Association (ERA), representing a group of mainly regional airlines and some cargo airline companies, and Airlines International Representation in Europe (AIRE), representing a small number of leisure airlines. Since TUI fly has cancelled its membership of AIRE, the representativeness of AIRE in the sector is significantly reduced; however, apart from AIRE, no other European employer organisation represents leisure airlines.

The main air navigation service providers (ANSPs) are represented by the Civil Air Navigation Services Organisation (CANSO), which thus represents the employers in air traffic management activities on the ESSDC. Even though there are also some airport tower traffic control activities provided by private companies that are not represented by CANSO, the largest proportion of air traffic control officers and other air traffic management employees are employed by ANSPs that are affiliated to CANSO, which makes it the most representative European employer organisation for air traffic management activities.

For ground handling activities within the civil aviation sector, there are two European organisations representing these workers. Airports Council International Europe (ACI Europe) represents most of the larger European airports and about 30% of the smaller airports (Tables 102 and 103 of the main report on civil aviation). ACI Europe also has affiliated companies providing specific ground service activities, such as baggage handling, ticket desk operation, airport security, airport fire services, aircraft maintenance and services to aircraft such as fuelling, catering, de-icing and pushbacks.

The second organisation, the Airport Services Association (ASA), represents specialised ground service-providing companies: Swissport, Menzies, Worldwide Flight Services (WFS), Goldair Handling, Celebi and several others (Table 112 of the main report). Both ACI Europe and ASA are recognised by the European Commission and for many years have participated in the civil aviation ESSDC.

This study affirms that the European associations representing airlines also have affiliated companies that provide ground services. A list of the largest three employers providing ground service activities in each of the 27 Member States (Table 136 of the main report) illustrates that these can be specialised ground service companies, airports or airline companies. Although there are different types of ground service-providing companies, the two separate European associations, ACI Europe and ASA, together with the European associations of the airlines, are collectively representative of all employers in ground service activities. While ACI Europe and ASA are recognised by the European Commission for consultations under Article 154 TFEU, ENAA and A4D are not.

About the sector

A wide variety of activities fall within the scope of the civil aviation sector. In terms of Nomenclature of Economic Activities (NACE) codes there are passenger air transport (NACE 51.10), freight air transport (NACE 51.21) and aviation services activities (NACE 52.23). All these different activities can be clustered in three main groups or activities:

1. airline companies
2. ground service providers
3. air traffic management

Table 2 presents an overview of these different activities. They can be considered as one sector with three subsectors, for which the civil aviation ESSDC has separate working groups.

Passenger and freight air transport are provided by airline companies that employ workers in a transnational environment. The pilots and cabin crew are the two main professional groups in this subsector. On 22 March 2000, the European social partners in the civil aviation sector reached an agreement on the working time of mobile staff in the sector, which was implemented by means of Council Directive 2000/79/EC of 27 November 2000. In this process, more than two decades ago, European social partner organisations were given the capacity to regulate transnational aspects of working time for aircrew, based on their representativeness.

To understand the sector, it is necessary to distinguish between different types of providers of air passenger and freight transport (a typology of **airline companies** is included in the main report). Legacy airlines are also called network carriers, because they operate regularly scheduled flights with larger aircraft, combining passenger air transport with freight transport activities. These airline companies operate relatively high numbers of aircraft with significant numbers of passenger seats and high maximum take-off weights, operated through connecting hub-and-spoke networks.[3] In contrast, low-cost carriers focus mainly on passenger air transport, operated through direct point-to-point flights. Low-cost carriers operate aircraft with a comparable average number of passenger seats to network carriers, but with proportionally much lower maximum take-off weights.

Regional airlines operate scheduled flights with smaller aeroplanes between regional airports, and mainly focus on passenger air transport. Also, regional airlines operate aircraft with lower maximum take-off weights, indicating that their focus lies on passenger air transport. Cargo airline companies operate planes without passenger seats; their activities are only in freight air transport. Therefore, cargo airlines do not employ cabin crew; their only aircrew are pilots. Leisure airline companies bring tourists to their holiday destinations on an occasional basis. Charter airline companies and corporate private aeroplane companies provide air transport on a contract basis. This can involve passenger or freight transport.

The mobile staff, referred to in Directive 2000/79/EC, are mainly employed in network carriers, low-cost carriers and regional airlines. Some airline holding companies bring together different types of airlines, and some of those also employ people working in different types of ground service activities. Concentration is a key feature of the airline business structure.

Table 2: Overview of the different types of companies

Airline companies	Ground service providers	Air traffic management
Legacy airlines – network carriers Low-cost carriers Regional airlines Leisure airlines Cargo airlines Charter airline companies	Self-handling airlines Airports Specialised ground service-providing companies	Air navigation service providers (ANSP) are the employers of: • air traffic control officers • air traffic safety electronics personnel • other air traffic management staff

Source: *Network of Eurofound Correspondents, 2020*

3 If the number of flights or the number of passengers were taken into consideration, low-cost airlines would appear larger. In this study, the only crucial factors are the number of employees and the proportion of the workforce represented by trade unions affiliated to European trade union organisations. For European employer organisations, the representativeness normally depends on the affiliated national employer organisations. This is not the case in the civil aviation sector, where representativeness depends on the companies that are involved in collective bargaining, shaping the working conditions of the entire workforce or a proportion of it, and how these companies have delegated some capacity to shape working conditions at European level to the European employer organisations.

Civil aviation **ground service activities** involve the operators of airport terminals and the providers of air traffic control services, but also various ground service providers, such as baggage handling for passenger and freight transport. First, there are airports and airport-operating companies that provide aviation services of various kinds. Second, there are airline companies that employ, besides mobile staff, employees providing ground services. Third, there are specialised ground service-providing companies, and among them there are some companies that focus on one specific type of ground service, such as baggage handling or aircraft maintenance, while other companies offer a wide range of different types of ground services. Some of the largest ground service providers are multinational companies operating in various EU Member States.

As well as airlines providing passenger and freight air transport, and the ground service-providing companies, there is also the **air traffic management activities** part of the civil aviation sector. This includes ANSPs, which employ air traffic control officers, but also air traffic safety electronics personnel and other air traffic management employees (such as managers and administrative staff).

Air traffic is regulated at global level by the International Civil Aviation Organization, established by the Chicago Convention of 1944. It obliges each state to provide air traffic management services in its airspace.

Within the EU, Member States are responsible for organising and controlling their airspace. The network manager (Eurocontrol is network manager until 2029) plays an important role to support and coordinate – with the ANSPs and other operational stakeholders – actions to improve the capacity and the performance of the European airspace. The European Union Aviation Safety Agency is the EU agency responsible for drafting and advising the European Commission on air traffic management/air navigation service regulations, including on the design of airspace structures and the requirements for the providers of airspace management. Eurocontrol is responsible for coordinating the ANSPs. Besides the main ANSPs and their national responsibilities, there are also private companies providing tower control services. These are also called terminal air navigation services. The Single European Sky initiative aims to make air traffic management more efficient and reduce fragmentation among providers.

Economic background and employment trends

The civil aviation sector was heavily affected by the COVID-19 pandemic and therefore the numbers of employees and passengers in 2020 and 2021 are not comparable with the pre-crisis situation of 2019. Historically, civil aviation activities have always been sensitive to global disruptive events, such as the 2001 terrorist attacks, the 2008 financial crisis or the 2010 Eyjafjallajökull volcano eruption in Iceland.

With no information as to how aviation activities would recover in 2022 and 2023, the study opted to use 2019 as the reference year, in terms of numbers of employees, for the assessment of the representativeness of the different actors in the sector.

In the EU27, there were almost 600,000 employees in civil aviation in 2018 and in 2019. Almost half of them (49%) were employed as aircrew (pilots and cabin crew) in passenger air transport, by airline companies. Among them, one-third were pilots and two-thirds worked as flight attendants, the cabin crew. The employees in activities related to air freight transport corresponded to 4% of the sectoral employment.

About 207,000 people (37%) were employed in aviation ground service activities, and around 55,000 people (10%) were employed in air traffic management. Among the air traffic management employees, about a third were air traffic control officers. The remaining two-thirds were air traffic safety electronics personnel and other air traffic management employees.

Baggage handling is one of the most important ground service activities, involving from 25% to 50% of all ground service employees in the country. Significant proportions of employees are also active in airport security, aircraft maintenance, and ticket desk and boarding activities. Airport fire services, de-icing and other ground service activities employ smaller numbers, but are also part of the sector. Airline catering and airport commerce activities are normally considered part of the catering sector and the commerce sector.

The breakdown of the civil aviation workforce is as follows: 49% are aircrew in passenger air transport, 4% are aircrew in freight air transport, 37% are ground services employees and 10% are employees in air traffic management activities.

The largest civil aviation sectoral workforces can be found in Germany (24% of the EU sectoral workforce), France (16%) and Spain (12%). These three Member States together employ half of the EU sectoral workforce. Across the EU, 0.34% of the entire EU workforce is employed in the civil aviation sector. In the Netherlands, the proportion of the national workforce employed in the sector is 2.7%, in Luxembourg it is 2% and in Malta it is 1.2%. Beyond these numbers, the strategic importance of civil aviation for the wider economy places it among the crucial national interests in national and international political spheres. Airline companies, airports and other aviation sector companies are not only important for the shaping of sectoral working conditions as employers of a large proportion of the sectoral workforce in their countries, but also are obliged to take political stances on, for example, state aid discussions, regulations regarding airport slots or protests by citizens living around airports against night flights.

Altogether, there were about 9,000 companies in the civil aviation sector in 2018, which on average employed 62 people each (Table 6 of the main report on civil aviation). For the countries with the largest sectoral workforces, Germany, France and Spain, the average number of employees per company was above 100.

The average combines very large employers such as Air France–KLM, Lufthansa, IAG and large ground service companies on civil aviation, such as Aviapartner, Fraport, Menzies, Swissport and WFS, and a relatively low number of 3,500 companies in the EU with much smaller workforces, fewer than 50 employees. The Air France–KLM group brings together Air France, which employed 41,230 employees in France before the COVID-19 crisis, and KLM, which employed 25,500 people in the Netherlands. Also part of the Air France–KLM group are the regional airline HOP!, with 2,700 employees in France, and the low-cost airline Transavia, with 2,600 employees in the Netherlands. Altogether, Air France–KLM accounted for approximately 82,000 employees, of whom 11% were pilots and flight deck crew, 29% were cabin crew and 60% were ground staff. The Lufthansa Group is even larger in terms of its workforce. In Germany alone, Lufthansa employed about 35,000 people, and its low-cost airline Eurowings another 9,250. Iberia (which belongs to IAG) employed about 17,000 people in Spain, and Ryanair approximately 8,000 people in Ireland. Ryanair indicated that the entire Ryanair Group had about 18,000 employees before the COVID-19 crisis.

Looking at the three largest sectoral employers of aircrew for each of the 27 EU Member States (Table 144 of the main report on civil aviation) indicates that network carriers are often among the largest employers in the sector, but low-cost carriers, regional airlines, leisure airlines and even cargo airlines also appear among the largest three sectoral employers in some Member States.

Over the years, the number of employees in the airline companies fluctuated only slightly between 2011 and 2019. Some companies grew significantly, while others markedly reduced their workforces. Some airlines went bankrupt, for example Malev in Hungary, Alitalia in Italy and Adria in Slovenia. Thus, while overall figures appear rather stable over the years, changes between companies in terms of both employment and market share may have undergone more fluctuations. The number of people employed in ground service activities, however, steadily increased, by 20% between 2011 and 2018, which is an annual increase of about 3%. The increasing number of companies in the sector mainly indicates the creation of small companies providing specific ground service activities or charter airline companies operating one or two aircraft. The most important trend for the sector is the growing number of air passengers per year, increasing from 265 million individual flights in 2011 to 355 million in 2019, which is an increase of 33% in eight years. Of course, the COVID-19 pandemic has drastically reduced air traffic, and decreased the number of flights in 2020 and 2021.

A sector in transition

Over several decades, the low-cost carriers have changed the civil aviation sector.[4] Legacy airlines apply the hub and spoke model, with their main national airports as the hub, and other destinations being spokes forming a network. This increases the number of possible destinations, which are provided by low-cost carriers and also by some of the network carriers operating in alliances. The centralised hub infrastructure is, however, costly and vulnerable to cascading delays due to hub congestion. The low-cost carriers operate on a point-to-point model, with comparable sizes of aircraft and on average shorter flight routes. For their employees this means being away from home for only a few hours, instead of a few days as for the network carriers' aircrew doing long-haul flights. The sector is currently changing further, partly due to an uneven recovery, following the COVID-19 crisis.

In the air traffic management subsector, the Single European Sky initiative has, since 1999, aimed to improve the performance of air traffic management activities though better integration of the European airspace, including some aspects of competition between the national air navigation service provider (ANSP) of each EU Member State and local terminal ANSPs. All these transitions affect the companies operating in the sector, how they compete or cooperate, but also how they are represented at national and European levels.

Different trends have a significant impact on the civil aviation sector, increasing the complexity of any study on the sector. Greening policies may affect the fiscal regime of aircraft fuel and bring regional airlines into increased competition with high-speed railway transport. Low-cost carriers have enhanced the democratisation of air passenger transport, with strongly increasing numbers of passengers over the years. Digitalisation has helped passengers to purchase air tickets online, while for airlines it has allowed engineered pricing of tickets depending on demand, the number of free seats on a scheduled flight, the time before the flight and the price of operating costs. The operating costs of airlines are partly fixed and partly volatile. The costs of wages, landing rights and ground services are largely fixed, while the important cost of fuel fluctuates. In addition, different ANSPs charge different prices, so that with lower fuel costs it can be beneficial to take a longer route through the airspace of ANSPs that charge lower fees, whereas this option may not be beneficial when fuel prices are higher. Between ground service-providing companies there is some competition, within certain limitations. Some actors argue that prices for services at hub airports are still very high, because there is not yet enough competition. Indeed, access to the ground handling market is regulated by EU Directive 96/67/EC of 15 October 1996. Some airlines have chosen to keep ground service activities, mainly in their home country, within the company, while for foreign operations they are often contracted out. The concepts of home country and foreign operations have, however, been blurred by the liberalisation of the EU market. Both network carriers and low-cost carriers operate as multinational companies with subsidiaries in several EU Member States.

4 The start of this was the liberalisation of the European aviation market in the 1990s (Burghouwt et al, 2015).

Finally, there is also competition between airports that operate as private companies. Nevertheless, there can be different forms of state support for airports, sometimes also from regional authorities, in a wider context to support the regional economy. Airlines choose to fly to and from different airports, using specific ground service providers or not, meaning that the different types of providers in this sector interact in different ways in a highly competitive, multidimensional market environment. Since the numbers of airline companies, ANSPs and ground service-providing companies are limited in each EU Member State, competition is intensified among a much smaller number of companies than in other economic sectors. This setting reduces the chances for national employer organisations to organise the sector, while companies are directly affiliated to European associations.

Historically, ground handling services were only provided by airports, and by some legacy airlines that also provided 'self-handling'. A4D reported that at least one of its low-cost member airlines also makes use of self-handling. Directive 96/67/EC aimed to liberalise the ground handling market by also allowing third parties to provide these services in larger airports. As of January 2001, this directive applies to airports having more than 2 million passengers or 50,000 tonnes of freight per year. A distinction is made between fully liberalised ground services, listed in the annex of the directive, and ramp services (such as baggage handling, ramp handling, fuelling, freight and mail handling), which may be reserved by the Member State for at least two suppliers, at least one of which is independent of the airport operator or the legacy airline companies. If the number of suppliers is limited, an open selection procedure is needed to grant licences for a maximum of seven years, based on relevant, objective, transparent and non-discriminatory criteria. The European Commission has initiated infringement procedures against Germany, Italy and Portugal for failing to implement these rules, and allowed temporary exemptions in 2015 for Zagreb Airport and in 2017 for Tallin Airport. In view of the COVID-19 pandemic, Regulation (EU) 2020/696 was adopted in May 2020, bringing in new temporary rules and derogations regarding the selection of suppliers of ground handling services and the maximum duration of their licences. Case law confirmed that airports must grant ground handling service providers access to airport installations, to allow these suppliers or self-handling airlines to perform their services. The airport may charge a fee for the use of equipment or infrastructure, but not for access to the market. This complex relationship between the three different types of ground service providers (airports, self-handling airlines and other ground handling service providers) also plays a role in the complex setting of the ESSDC. ACI Europe represents the airports as ground handling service providers, ASA represents the third-party ground service providers, and ENAA, A4D, ERA and AIRE represent airlines, which in some cases operate as self-handling providers of ground services.

National-level industrial relations

National trade unions in the civil aviation sector

The main report on civil aviation identified 166 national civil aviation sector trade unions, some organising one or two specific activities, others organising all, or almost all, types of aviation sector workers in their country. There are 72 trade unions organising aircrew, 83 trade unions organising air traffic management employees and 89 trade unions organising ground service activities. All sectoral trade unions are listed and analysed in Chapter 2 of the main report. There are trade unions organising aircrew in 21 of the 27 EU Member States. For Bulgaria, Cyprus, Estonia, Lithuania, Slovakia and Slovenia, there were no trade unions identified that organise aircrew. For the air traffic management employees there are trade unions in 26 Member States. In Slovakia there is no trade union organising air traffic management employees. For ground handling activities there are trade unions in all 27 Member States. The specific membership domains of all sectoral trade unions, indicating which types of employees they organise, are outlined in the main report. The relative membership strength in numbers of affiliated individual trade union members, and as a proportion of the national sectoral workforce, is also detailed. The ranking of largest, second-largest and third-largest sectoral trade unions groups the individual trade unions in terms of their membership strength. The main report describes in detail the involvement of trade unions in sectoral collective bargaining and the types of workers covered, as well as identifying the formal status of the organisations – whether they are trade unions or professional associations, and recognised as representative or not within their country. Affiliation to national cross-sectoral trade union organisations is also outlined, given that this is a factor embedding organisations into the national industrial relations landscape.

National employer organisations in the civil aviation sector

The report identified 41 national civil aviation sector employer organisations. The smaller number of employer organisations contrasts with the much higher number of sectoral trade unions. For the employers in ground service activities there are 33 employer organisations identified in 18 Member States, while for the employers of aircrew there are only 16 employer organisations in 13 Member States and for the employers of air traffic management staff there are only 12 national employer organisations in 10 Member States. All sectoral employer organisations are listed and analysed in the main report. The absence of employer organisations in several EU Member States for some civil aviation sector activities points to the greater importance of companies that are directly affiliated to European employers' associations, without the intermediaries of national employer organisations. This is reflected in the main report's finding regarding the relatively lower importance of multi-employer collective bargaining at sector level, and the higher importance of single-employer bargaining at company level. Chapter 5 of the main report underscores the importance of individual companies for the assessment of representativeness in the civil aviation sector.

Data on membership domain, indicating the parts of the sector organised by the national employer organisations, is provided in Tables 20–24 of the main report. The membership strength of the employer organisations is indicated in Table 25, with the number of affiliated companies and the proportion of the sectoral workforce employed by the affiliated companies. Their importance mainly depends on whether the largest individual employers are part of this national sectoral employer organisation or not. If the largest civil aviation companies are part of the sectoral employer organisation, this undoubtedly has a dominant influence on the strategies and policies of the organisation, as in terms of workforce, turnover and economic impact they are thousands of times bigger than smaller companies in the sector, such as charter companies or smaller companies providing specific ground services such as de-icing. If the largest companies are not part of the national sectoral employer organisations, the representativeness of the largest individual employers in the sector is also, in most countries, hundreds of times bigger than the representativeness of the smaller companies represented by sectoral employer organisations.

The involvement of national employer organisations in collective bargaining and national sectoral social dialogue is analysed in full in the main report.

Collective bargaining and sectoral social dialogue at national level

Most of the trade unions (93%) are involved in collective bargaining. The remaining 14 organisations may either be professional associations or trade unions that are not recognised as representative and therefore not entitled to participate in collective bargaining or be active in a part of the sector for which there is no established collective bargaining in that country. A distinction can be made between trade unions only involved in multi-employer bargaining at sector level, those only involved in single-employer bargaining at company level and those that are involved in both forms of collective bargaining. There are 103 sectoral trade unions (61%) that are only involved in single-employer collective bargaining at company level. This is exceptionally high in comparison with other sectors and underlines the importance of large companies as industrial relations actors in the sector.

In terms of national employer organisations, there are only four that are not involved in collective bargaining and one about which no information is available. Again, with nine organisations having some involvement in single-employer bargaining, which is exceptional for employer organisations, the importance of company-level collective bargaining is underlined.

The different practices of collective bargaining in the sector, at multi-employer level, at single-employer level or a combination of both, are covered in Table 28 of the main report. The proportion of the sectoral workforce covered by collective bargaining can be found in Table 29 of the main report.

The degree to which national sectoral trade unions and employer organisations are consulted by the national government or participate in sectoral policy initiatives is analysed in detail in the main report.

The field of national sectoral business associations, which are not involved in collective bargaining or sectoral social dialogue at national or European level, has not been investigated in this study. Given the proven high proportion of the sector's employment in large companies as single employers in the sector, the importance of such associations in terms of sectoral representativeness can be assumed to be small. If the large companies are affiliated to those associations, it can be assumed that they are somehow dominating the organisations, in a way that the large companies remain more important than the associations. The analyses of other European associations in the sector and their national member organisations did not indicate any business association structures of relevance in terms of sectoral representativeness.

In total there are 11 Member States where there are sectoral social dialogue structures.

Companies as industrial relations actors in the civil aviation sector

National employer organisations represent ground handling companies in 18 Member States, employers of aircrew in 13 Member States and employers of air traffic management staff in only 10 Member States. Only a few of these national sectoral employer organisations are involved in collective bargaining shaping the working conditions in the sector. This is because collective bargaining in the civil aviation sector is mainly with single employers, at company level, between trade unions and the management of the given company, normally without any involvement of sectoral employer organisations. The interim results of this study also showed that hardly any of the national sectoral organisations were affiliated to the European employer organisations.

Subsequently, further data collection was carried out to see whether there were any other national sectoral organisations with no involvement in sectoral collective bargaining, as this was non-existent in many countries. There were some associations that had some sectoral representativeness based on other characteristics, for example their involvement in sectoral social dialogue structures or a large membership strength. This wider search helped to identify additional national sectoral employers' associations. The outcome of this additional search was that, because of the importance of single companies in this sector, an additional chapter was needed to clarify the position of large companies as industrial relations actors (Chapter 5 of the main report).

Once it was established that the membership basis of European employer organisations was composed of directly affiliated companies, three reasons emerged for including a specific chapter on the role of individual companies in industrial relations in the sector. First, the assessment of representativeness based on a combined bottom-up and top-down approach also required information on the crucial companies that are not represented at European level. Normally the bottom-up approach identifies all national sectoral organisations, and the top-down approach clarifies which of those national organisations confirm that they are affiliated to the European organisations, and are hence represented on the ESSDC. With only information on the affiliated companies, not on the companies that are not affiliated, only the top-down approach was possible, and there could be no accurate assessment of what proportion of the sector is represented. This was the first reason why an additional specific chapter on companies as industrial relation actors was added to the main report.

Second, it became clear that the different airlines or ground service providers affiliated to a single European employer organisation represented different activities or types of providers. Therefore, a typology of airline companies was developed, broken down into legacy airlines (also called network carriers), low-cost carriers, regional airlines, leisure airlines, cargo airlines, charter airlines and corporate airlines. This typology builds on three indicators: the number of aircraft operated, passenger seats and maximum take-off weight. These three indicators made it possible to see clearly the characteristics of the different types of airline companies. The network carriers (legacy airlines) have on average the largest average number of seats and maximum take-off weight per aircraft operated, as they combine freight with passenger air transport. Low-cost carriers operate planes with much lower maximum take-off weights, as their focus is on passenger air transport. Regional airlines operate much smaller aeroplanes, with a lower average number of passenger seats, while cargo airlines have no passenger seats at all, and also have no cabin crew but only pilots and ground handling employees.

In terms of ground service providers, three types were distinguished: airports, self-handling airlines and specialised (third-party) ground service providers. The types of companies providing air traffic management activities are detailed in the main report.

Finally, the interim results showed a strong tendency towards concentration. Single airlines were brought together in larger groups of airlines. In addition, the number of ground service providers appeared to be quite small in most Member States. The low number of operators, in markets with intense competition between providers of the same type, but also between different types of activities, makes the creation of sectoral employer organisations more difficult. The largest companies or groups of companies take to some extent the role that is normally given to employer organisations in other economic sectors. Membership information from sectoral organisations is often easier to obtain than employment data from individual companies. For companies not represented by European associations, it is most difficult to obtain information on what they represent in the sector, as they do not have a direct interest in disclosing this. Without information on what part of the sector is employed in the companies not represented in the ESSDC, no complete assessment of the proportion represented by the European social partner organisations could be made. Information was therefore collected on the three companies with the most employees in each activity, in each of the 27 Member States, in order to assess how many of these largest companies are represented on the ESSDC.

European trade unions in civil aviation

This section outlines the representativeness of the three European trade union organisations, followed by an analysis of the national trade unions that are not represented on the civil aviation ESSDC, and the other European associations with some representativeness in the sector that do not participate in the ESSDC. Subsequently, a similar analysis is made of the seven European employer organisations (next section).

Two European associations representing trade unions are currently recognised by the European Commission as organisations to be consulted under Article 154 of the Treaty on the Functioning of the European Union (TFEU), and also participate in the civil aviation ESSDC. These are the European Transport Workers' Federation (ETF) and the European Cockpit Association (ECA). While the Air Traffic Controllers European Unions Coordination (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 air traffic controllers. ETF represents all types of workers, including pilots and air traffic controllers.

Representative European trade union organisations

Representativeness of the European Transport Workers' Federation

ETF represents 63 of the 166 sectoral trade unions in 23 EU Member States. In Cyprus, Latvia, Lithuania and Slovakia, it has no sector-related trade union affiliate. In Greece and Slovenia, it has affiliated trade unions that are not involved in collective bargaining. Most of the ETF-affiliated trade unions are only represented on the ESSDC by ETF, as the number of ETF unions that are also affiliated to other European trade union organisations is very small. ETF represents all types of civil aviation workers in all types of sectoral activities, shown in Table 3.

Table 3: Representativeness of ETF in the civil aviation sector

Indicator	Pilots	Cabin crew	Air traffic control officers	Other air traffic management staff	Ground handling employees
Number of affiliated trade unions	18	31	29	35	46
% of all trade unions organising this group of workers	39	69	46	57	53
Number of Member States with affiliated unions	10	16	15	19	21
Member States with affiliated trade unions involved in collective bargaining	10	13	13	14	20
Figures and tables with more detailed data (main report)	Figure 18, Tables 59 and 62	Figure 18, Tables 59 and 62	Figure 19, Tables 60 and 62	Figure 19, Tables 60 and 62	Figure 20, Tables 59, 61,and 62

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

ETF has affiliated trade unions that organise the largest airline companies in most Member States, the largest air traffic management providers in 9 Member States, and some of the largest ground service-providing companies in 16 Member States. Its representativeness in the larger companies in the sector is supported by the supporting role of ETF in the European works councils of the Air France–KLM group, IAG, Lufthansa, TUI, Swissport and Menzies.

A detailed analysis of the involvement of ETF trade unions in sectoral collective bargaining is provided in Table 62 of the main report. ETF has a statutory capacity to negotiate, with clear mandating and decision-making procedures. Because of its capacity to negotiate, and because of its wide and overall strong membership domain, it is the most representative European sectoral trade union organisation.

Representativeness of the European Cockpit Association

ECA represents 20 trade unions and professional associations organising pilots in passenger and freight air transport, in 18 different Member States. In 16 Member States, ECA has an affiliated organisation involved in collective bargaining. Most of its members are only represented on the ESSDC by ECA. The membership domain of the organisations affiliated to ECA is limited to the single professional group of pilots. Three affiliated unions exceptionally also organise cabin crew, and one also organises ground service employees. However, on the ESSDC it represents only the pilots. The cabin crew and the ground service employees affiliated to those trade unions are not represented by ECA in the ESSDC. ECA's capacity to negotiate is confirmed by Articles 5 and 7 of its statutes.

Representativeness of the Air Traffic Controllers European Unions Coordination

ATCEUC represents 23 trade unions and professional associations organising air traffic control officers in 20 Member States. Among all 58 trade unions organising air traffic control officers, ATCEUC has 21 affiliated organisations (36%) in 20 Member States. In 20 Member States, the trade union with most affiliated air traffic control officers, in the largest ANSP and in the entire country, is represented by ATCEUC. The ATCEUC-affiliated trade unions also organise air traffic safety electronics personnel and other air traffic management employees in 7 Member States. The focus of its representativeness is, however, limited to the single professional group of air traffic control officers. ATCEUC has 17 affiliated trade unions involved in collective bargaining on behalf of air traffic control officers in 16 Member States, while only 6 are involved in collective bargaining on behalf of air traffic safety electronics personnel, and 7 are involved on behalf of other air traffic management staff. ATCEUC affirms that it has the capacity to negotiate on behalf of all its member organisations.

National trade unions not represented on the ESSDC

Another 59 trade unions organise workers in the civil aviation sector and engage in collective bargaining on their behalf. Of the trade unions not represented on the ESSDC, only three have a wide membership domain organising all kinds of employees in the civil aviation sector. These are ACV-CSC CNE (Belgium), UGL Trasporto Aereo (Italy) and the Federation of Latvian Aviation Trade Unions (Latvia). The largest group of trade unions not represented on the civil aviation ESSDC are the 38 trade unions organising employees in ground services, in 16 Member States. Of these 38, 26 only organise employees in ground service activities, and the 12 others also organise either aircrew or air traffic management employees.

Air traffic safety electronics personnel and other air traffic management employees are the other group of employees that is also relatively often organised by trade unions that are not represented in the ESSDC. This is the case for 18 trade unions organising air traffic safety electronics personnel or other air traffic management employers, which are not affiliated to a European trade union organisation involved in the ESSDC. Also not represented on the ESSDC are 11 trade unions organising air traffic control officers in 10 Member States, 10 trade unions organising pilots in 8 Member States and 7 trade unions organising cabin crew in 6 Member States.

Other European associations representing sectoral trade unions

There are five other European associations to which some civil aviation sector trade unions are affiliated. First, the European Cabin Crew Association (EurECCA) has six affiliated trade unions that represent cabin crew in Germany, Greece, Italy, the Netherlands, Portugal and Spain. The Italian member organisation ANPAC is already represented on the ESSDC through its membership of ECA, but only for pilots. ECA does not represent other groups of workers that are organised by trade unions affiliated to it; only the pilots are represented by ECA. Consequently, EurECCA alone represents its member unions that are not yet represented on the ESSDC – Unabhängige Flugbegleiter Organisation (UFO) in Germany, Ryanair Aircraft Crew Union in Greece, Vereniging Nederlands Cabinepersoneel in the Netherlands, National Union of Civil Aviation Flight Staff in Portugal and STAVLA in Spain – and the organised cabin crew members affiliated to ANPAC. All six trade unions affiliated to EurECCA are involved in single-employer collective bargaining at company level. The trade union that organises most cabin crew members in each of the Netherlands and Portugal is affiliated to EurECCA. The EurECCA affiliate in Germany (UFO) organises most cabin crew members in Lufthansa, while for all other airline companies (Eurowings, Ryanair and EasyJet) it is the ETF-affiliated union ver.di that organises most cabin crew members. This means that only in the Netherlands and Portugal can EurECCA claim as an affiliate the trade union that organises the largest proportion of cabin crew members.

Second, the European Confederation of Independent Trade Unions (CESI) and the European Federation of Public Service Unions represent trade unions from public sector activities. The three civil aviation sector trade unions that are affiliated to the European Federation of Public Service Unions are all also affiliated to ETF and thus well represented on the ESSDC. For the two sectoral trade unions affiliated to CESI, this is not the case. The only unions in the civil aviation sector that are directly represented by CESI and not represented on the ESSDC are dbb in Germany and Unica in Italy. ATCEUC is also part of CESI. Adding the 17 air traffic control officers' unions that are part of ATCEUC, and are represented by ATCEUC on the ESSDC, to the two trade unions only affiliated to CESI, indicates how representative it is of the sector.

Finally, European Federation of Food, Agriculture and Tourism Trade Unions and UNI Europa have three sectoral trade unions as members, which are also affiliated to ETF. These are Vida (Austria), Federación de Servicios a la Ciudadanía de CCOO and FeSMC-UGT (both Spain). The relevance of EFFAT in the sector could point to catering activities being part of ground service providers, while the role of UNI Europa could point to wider private service activities. Nevertheless, as all three trade unions are already represented through ETF on the civil aviation ESSDC, this can be ignored.

In conclusion, only EurECCA has some unique representativeness in the sector that is not yet represented on the ESSDC. CESI also has some representativeness, although the members of ATCEUC are involved in the ESSDC. It should be noted that all of the foregoing is analysed in detail in the main report.

European employer organisations in civil aviation

Altogether seven European associations represent the employers on the ESSDC (Table 4), although the capacity of these organisations to represent their member companies as European employer organisations varies, as some are mostly focused on representing the business interests of their affiliates. Each organisation represents employers in a different part of the civil aviation sector. For the airlines, there are four European employer organisations, with a primary focus on a specific type of airline.[5] For the employers of ground services there are two European employer organisations and for the air traffic management activities there is only one. In 2022, there were five included in the list of organisations to be consulted under Article 154 TFEU. These are ERA, AIRE, ACI Europe, ASA Europe and CANSO.

Table 4: European employer organisations in the civil aviation sector

Subsector	Organisation	Activities represented
Airlines	ENAA (formerly called ACP)	Network carriers
	A4D	Low-cost airlines (and also network carriers)
	ERA	Regional airlines (and cargo airlines)
	AIRE	Leisure airlines
Ground services	ACI Europe	Airports
	ASA Europe	Specialised ground service providers
Air traffic management	CANSO	Air traffic control

Source: *Authors' own elaboration*

5 A4D members include both low-cost carriers and legacy airlines, with no specific focus on low-cost carriers, according to A4D.

The four European associations representing airline companies are ENAA, A4D, AIRE and ERA. ENAA mainly represents the network carriers, the legacy airline companies, for example Air France–KLM, Lufthansa, SAS, Croatia Airlines and TAP. A4D represents the low-cost carriers Ryanair, Norwegian and EasyJet and the network carriers Finnair and IAG (including Iberia, Aer Lingus and British Airways) in the EU27. Some of the A4D member companies operate both low-cost and legacy models. ERA represents regional airlines and cargo airlines, and AIRE represents some leisure airline companies. The membership of each of these four European airline associations is somewhat mixed, including different types of European airlines. None of them represents all airline companies of the type they mainly aim to represent, but together they can claim significant collective representativeness.

The member companies of ENAA together operated 28% of all registered aircraft in the EU in 2019. A4D operated 22%, AIRE 3% and ERA 9%. Deducting the 165 aircraft operated by airlines that are affiliated to more than one European organisation, to avoid double counting, gives a total of about 59% of the aircraft operated in the EU represented on the ESSDC.

CANSO is the European employers' association representing the ANSPs. For the ground service providers, ACI Europe represents airports and ASA represents specialised ground service providers. As indicated earlier, there are also the European airline associations, which represent their affiliates to the extent to which airline companies carry out self-handling of ground services.

Representative European employer organisations

Representativeness of the European Network Airlines Association

ENAA is the new name for the organisation previously known as ACP. ENAA has kept the same statutes, member organisations and structures as ACP, meaning that the change from ACP to ENAA involved only a change of name. ENAA is the European employer organisation representing mainly network carrier airlines. These are the airlines that are part of the Air France–KLM group, the Lufthansa Group (Austrian Airlines, Brussels Airlinesand Lufthansa), SAS, TAP and Croatia Airlines. ENAA also has, however, a few regional airlines (such as HOP!, KLM Cityhopper, Air Dolomiti and Lufthansa CityLine) and some low-cost carriers (Transavia and Eurowings) in its membership, where these are part of legacy airline groups, such as Air France–KLM or the Lufthansa Group. All affiliated companies together operated about 28% of all aircraft registered in the EU in 2019.

The airlines affiliated to ENAA employ pilots and cabin crew in 10 Member States, and ground handling employees in 8 Member States. Given the fact that ENAA managed to provide detailed numbers of people employed in each Member State by all its affiliated airlines, it can be assumed that its internal cooperation enables ENAA to represent all its members as a European employer organisation. ENAA's capacity to negotiate on behalf of its members is based on ad hoc procedures and good informal communication with the member companies, mainly by email.

ENAA is an association of companies whose secretariat is supplied by a dedicated support team provided by DR2 consultants, its director of social affairs and the director of the competitiveness working group. ENAA does not have its own website. One of the statutory objectives is 'to create a common platform for air carriers in the EU, advocating on social issues and participating in the ESSDC' (ACP/ENAA statutes). ENAA has a social affairs working group, with delegates from the affiliated companies, which is chaired by ENAA's social affairs director. Like many other European associations in the sector, ENAA recently changed its social affairs director, although a good handover process has enabled ENAA to maintain its high commitment to the ESSDC without disruption.

Except for Air Dolomiti (Italy), all airlines affiliated to ENAA are represented at national level by 12 different national sectoral employer organisations. None of these has any link or cooperation with ENAA, which only has a direct link with the airline companies themselves. ENAA has affiliated companies involved in single-employer collective bargaining in 10 Member States: Austria, Belgium, Croatia, Denmark, France, Germany, Italy, the Netherlands, Portugal and Sweden.

Representativeness of Airlines for Dialogue

A4D has as members the low-cost carriers Ryanair, Norwegian and EasyJet and the network carriers Finnair and IAG (including Iberia, Aer Lingus and British Airways) in the EU27. Some of the A4D member companies operate both low-cost and legacy models. The membership of Norwegian and EasyJet and their involvement in A4D have not been confirmed in the scope of this study. This study could not clarify whether these member companies are also represented by A4D in their capacity as employers. A4D states they are full members.

Based on data collected by Eurofound national correspondents, this study confirms that A4D represents its member airlines as employers of pilots, cabin crew and ground handling employees in Finland (Finnair), Ireland (Aer Lingus and Ryanair) and Spain (Iberia and Vueling). Ryanair employs pilots in 22 Member States and cabin crew in 23 Member States.[6] The five Member States where Ryanair does not act as employer of civil aviation employees are Estonia, Finland, Luxembourg, the Netherlands and Slovenia. Altogether A4D can thus fall

6 The situation of Ryanair is clarified here at the request of A4D. For Finnair and IAG, some information was also provided. For other airlines affiliated to A4D, no information could be provided in the scope of this study.

back on a relatively wide membership base, channelled through a relatively small number of groups of airline companies, combining network carriers with low-cost carriers. All affiliated airline companies together operated about 22% of all registered aircraft in the EU in 2019.

As it covers people employed by the airlines that are part of Ryanair Group (Ryanair, Buzz, Lauda Air and Malta Air), IAG (including Iberia, Aer Lingus, Vueling and those British Airways employees who are in the EU27) and Finnair, the representativeness of A4D combines the interests of some low-cost carriers with those of some network carriers. In terms of the network carriers, the membership of Iberia, Aer Lingus and Finnair gives A4D some representativeness for this type of airline, although it is significantly smaller than that of ENAA. For the low-cost airline type, there are also some airlines of this type not affiliated, and WizzAir and Volotea have left A4D. Nevertheless, with Ryanair, Vueling, EasyJet and Norwegian, A4D has the strongest membership basis in the low-cost airline type. A4D, however, asserts that it does not focus on this, indicating that its member companies operate with both low-cost and network carrier models.

The fact that the membership domain is channelled through a relatively small number of airline groups allows its internal structure to be light. While A4D has no office in Brussels, member companies allocate resources to the organisation, allowing it to have a three-person secretariat. There are, however, two directors, one delegated from Ryanair and a second from IAG. Their difficulty in collecting numbers of employees for all affiliated airline companies indicates that their focus lies more on the advocacy of business interests, and not so much on the representation of the affiliated companies in their capacity as European employer organisations. Based on a letter from A4D from July 2018 requesting participation in the civil aviation ESSDC, which is co-signed by IAG, Finnair and Ryanair, it can be assumed that A4D is an association of companies, with some capacity of the individual affiliated airlines to negotiate at national level, without this being delegated to A4D. Based on the available information, A4D has thus no capacity to negotiate. A4D has, however, since 2020, co-signed several joint statements with other European social partners in the civil aviation sector. Without any clarification on the internal decision-making and whether these joint opinions are signed on behalf of, and with full commitment from, all its members, A4D's capacity to negotiate remains dubious. All joint texts, indicating the associations that have signed them, are listed in Table 122 in the main report.

The affiliated airlines are involved in single-employer collective bargaining in three Member States: Finland, Ireland and Spain. Not all member companies of A4D cooperated by providing information. It may be that there is collective bargaining by A4D-affiliated airlines in other Member States, although this information could not be provided in the scope of this study. The Member States where A4D member companies are involved in social dialogue or collective bargaining are analysed in the main report.

The companies affiliated to A4D are affiliated to national employer organisations in five Member States, some at cross-industry level (for instance, DI in Denmark and Palta in Finland), others being national civil aviation employer organisations, such as WKÖ-FVALS in Austria, ALA in Spain and Transportföretagen in Sweden. A4D has, however, no link or cooperation with any of these national employer organisations; it has only direct links with the affiliated airline companies.

Representativeness of the European Regions Airline Association

ERA mainly organises regional airlines. It has affiliated regional airline companies in nine Member States: Cyprus, Germany, Greece, Finland, France, Portugal, Romania, Spain and Sweden. Altogether the affiliated regional airline companies operate 279 of the 476 aircraft (58%) operated by all regional airline companies in the EU.

The second strand of ERA's membership domain is the affiliated cargo airlines in Belgium, France, Hungary and Ireland. Together they operate 85 of the 227 (37%) cargo-only aircraft registered in the EU. Besides, there are also a few charter airline companies from Denmark, France, Ireland and Lithuania, one low-cost airline company from Romania, and two network carriers, Croatia Airlines and Luxair. All affiliated airline companies together operated about 9% of all registered aircraft in the EU in 2019.

ERA also has ground handling service providers affiliated. These are 11 airports in seven Member States, and providers of aircraft maintenance, leasing or financing services, legal services, training or very specific ground service activities. ERA has only one national sectoral employer organisation affiliated, Transportföretagen from Sweden. This organisation is involved in sectoral collective bargaining. With the affiliated companies, ERA has 21 member companies involved in single-employer bargaining in 11 Member States. Together with the affiliated employer organisation from Sweden, ERA thus has affiliates involved in collective bargaining in 12 Member States.

The ERA secretariat numbers 10 staff members, of whom three are regularly involved in the ESSDC activities. ERA has clarified its capacity to fully represent and negotiate on behalf of its members. This happens based on a case-by-case approach that is not standardised and not formalised.

Representativeness of the Airlines International Representation in Europe

AIRE organises mainly smaller leisure airlines, such as Sunclass Airlines (Denmark), AlbaStar, Evelop Airlines and Wamos (Spain), Neos (Italy) and AirExplore (Slovakia). It does not represent the largest leisure airlines (TUI fly and Novair) any more, since they are no longer affiliated to AIRE. Furthermore, several leisure airlines operating more than 10 aircraft in the EU Member States are not affiliated to AIRE, for example Condor and SunExpress (Germany), Smartwings (Czechia), Air Europa (Spain), Blue Panorama Airlines (Italy) and Enter Air (Poland). Even if the strongest focus of its membership is on leisure airline companies, the affiliates operate altogether only 50 of the 329 aircraft (15%) operated by leisure airline companies in the EU.

The membership domain of AIRE, however, does not only cover leisure airlines. There are also one network carrier (LOT, Poland), one low-cost airline (Transavia, Netherlands) and one regional airline company (EuroAtlantic, Portugal) that are affiliated to AIRE. Altogether, all affiliated airline companies operate 169 aircraft, which corresponds to 3% of all aircraft registered in the EU in 2019.

With its affiliated leisure airlines, AIRE thus covers four Member States: Denmark, Italy, Slovakia and Spain. Adding the other affiliated airlines also gives it some representativeness for the Netherlands, Poland and Portugal. AIRE only has four member companies involved in single-employer collective bargaining: Sunclass Airlines (Denmark), Evelop Airlines (Spain), LOT (Poland) and Transavia (Netherlands).

AIRE is mainly an association advocating the most cost-efficient environment for the business activities of its members. Based on the AIRE statutes, it clearly has no statutory mandate or capacity to negotiate on behalf of its members. Since AIRE did not provide any information on its secretariat, its internal structures or its mandating or decision-making procedures, there is no indication of whether or how AIRE is able to represent its member companies as a European employer organisation.

Representativeness of the Airports Council International Europe

ACI Europe counts among its regular members the owners or operators of one or more civil airports with scheduled or permanent commercial air services. Having checked all 471 such airports in the EU27, the study confirmed that 187 of them (40%) were regular members of ACI Europe. Looking at the 20 largest airports in terms of number of passengers per year, they are all represented by ACI Europe: 17 are directly affiliated to ACI Europe, and 3 French airports are indirectly affiliated through UAF, the association of airports in France. In addition, all the 10 largest airports for freight air transport are represented by ACI Europe, eight by direct membership and the two others through ADV, the German airports association. Of all 94 larger airports with either more than 2 million passengers or more than 50,000 tonnes of freight per year, 76 are directly affiliated (81%) and most of the others are indirectly represented through the national airport associations of France, Germany, Italy and Romania.

ACI Europe has affiliated airports that are involved in single-employer collective bargaining in 19 Member States. This is not the case for Austria, Belgium, Cyprus, Estonia, Hungary, Lithuania, Slovakia or Sweden. The airports affiliated to ACI Europe are involved in national sectoral employer organisations in 14 Member States: Austria, Belgium, Bulgaria, Denmark, Finland, France, Germany, Greece, Hungary, Italy, the Netherlands, Portugal, Slovakia and Sweden. ACI Europe has, however, no link or cooperation with any of these sectoral employer organisations except Assaeroporti (Italy). ACI Europe clearly prioritises in its statutes the membership of individual airports or companies operating several airports. National associations of airports can only become associated members.

Based on the information provided by ACI Europe, it appears the sole aim of the organisation is to represent the economic and political interests of airports. ACI Europe does not operate as a European employer organisation, representing the interests of the affiliated airports as employers. It 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, using an ad hoc procedure. ACI Europe has no working group in which ESSDC matters are prepared or discussed independent of the meetings of the ESSDC. A final decision to adopt a joint text in the ESSDC is taken by the ACI Europe management and signed by the director general, normally without a mandate or decision-making in any of the ACI Europe statutory bodies.

Representativeness of the Airport Services Association

ASA represents specialised ground handling companies, such as Swissport, Menzies, WFS, Çelebi and Goldair. It also represents two airport operators, namely Tallin Airport and Acciona Airport Services, which operates several airports. The focus of ASA, though, lies with third party, specialised ground service providers.

ASA has a secretariat in Brussels, with one staff member. The director general of ASA is in fact also the managing director of the Airline Catering Association. ASA believes it has the capacity to negotiate agreements, but it has no standard formal mandating procedure and also no ad hoc procedure for mandating or decision-making on ESSDC texts. As the statutes do not provide any guidance for this, and in the absence of rules of procedures, there is a case-by-case assessment on how to deal with different ESSD initiatives or texts.

ASA has member companies involved in single-employer collective bargaining in six Member States: Bulgaria, Cyprus, Greece, the Netherlands, Portugal and Spain. Its member companies are involved in national sectoral employer organisations in Estonia, the Netherlands and Spain, although no link or cooperation exists with those national sectoral employer organisations. For the directly affiliated companies providing ground services, the interest representation within ASA is mainly focused on political and economic advocacy. It is doubtful whether there is any interest representation of the affiliated companies as employers of ground service employees, at European level. ASA is thus more of a European business association than a genuine European employer organisation.

Representativeness of Civil Air Navigation Services Organisation Europe

CANSO Europe represents the ANSPs of 25 Member States. Altogether they employ about 36,800 air traffic management employees, which corresponds to about 90% of the air traffic management employees in the EU. In most EU Member States 100% or almost 100% of employees in air traffic management activities are employed by the ANSPs that are affiliated to CANSO Europe. The ANSPs of 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.

Exceptionally, there are also private companies providing terminal air navigation services. For example, in Spain, SAERCO provides air navigation from nine air traffic control towers, and FerrolNATS from four other towers. ENAIRE is the ANSP of Spain, which is affiliated to CANSO. ENAIRE employs 2,000 air traffic control officers, while SAERCO and FerrolNATS together employ 175 air traffic control officers. Thus, the member organisation of CANSO in Spain employs 92% of air traffic control officers and about an estimated 75% of all air traffic management employees.

It was reported that in 17 Member States all air traffic management employees are employed by the member organisation of CANSO, given the monopoly position of most ANSPs in terms of these specific civil aviation sector activities. In another four Member States (France, Germany, Hungary and Portugal) the proportion is almost 100%. In Bulgaria, Estonia, Germany, Greece and Luxembourg the proportion of all national air traffic management employees who are employed by the CANSO member organisation was not clarified; in Spain it is probably about 75%.

The membership-based representativeness of CANSO for the employers of air traffic control officers, air traffic safety electronics personnel and other air traffic management employees is thus very strong.

In terms of its capacity to negotiate on behalf of its member ANSPs, CANSO has no formalised procedure for mandating or decision-making regarding ESSDC initiatives, texts or agreements. Surprisingly, everything depends on a case-by-case approach, without any predictability or clarified procedure. This contrasts with the strongly regulated procedures of the air traffic control activities represented.

National sectoral employer organisations not represented on the ESSDC

This study identified 51 civil aviation sector employer organisations in 21 Member States. Only two of them are represented on the civil aviation ESSDC: Assaeroporti (Italy), which is affiliated to ACI Europe, and Transportföretagen, which is a member of ERA. This very low level of representation of sectoral employer organisations on the ESSDC is because all European associations have directly affiliated companies, and represent their corporate interests directly at European level, without the intermediation of national employer organisations, unlike most other ESSDCs for other economic sectors.

Other European associations representing sectoral employers and employer organisations

Looking at the other European associations to which national sectoral employer organisations are affiliated allows four organisations to be mentioned here. First, there is the strictly business-focused association Airlines for Europe (A4E), which represents the business interests of airlines that are represented on the ESSDC mainly by ENAA and A4D. A4E has, however, a few airline companies affiliated that are not represented at all on the ESSDC. These include, for example, the network carrier Aegon, the regional airline Air Baltic, the low-cost airline Jet2.com, the cargo airline CargoLux and the leisure airlines Smartwings and TUI fly.

Second, there is SGI Europe, which represents at cross-industry level employer organisations from the public sector that represent employers providing services of general interest. For example, the German employer organisation VKA and the Portuguese airline company TAP have reported membership of and involvement in SGI Europe.

The Central and Eastern European Travel Retail Association (CEETRA) has, according to its website, affiliates in the sector in eight Member States. For example, Vienna International Airport reported being affiliated to and involved in CEETRA, as one of its co-founders. There may be some other European tourist-oriented organisations in which some leisure airline companies have some interest representation.

It is important to note that there is a European association for charter airline companies called the Air Charter Association (ACA). On its website (ACA, undated), the ACA claims to be the leading worldwide trade association for companies and individuals engaged in aircraft charter activities. There is no sign that the ACA represents the affiliated companies in their capacity as employers. In the early years of the European civil aviation social dialogue, there was an organisation called the Air Chartered Carrier Association; it is not clear whether this is the same organisation. There is, however, no other European employers association in the ESSDC that represents the category of charter airline companies.

Finally, there are some European organisations in the field of air traffic management. The European Organisation for Civil Aviation Electronics (EUROCAE) is a European association active in developing recognised technical standards and procedures for computer systems in air navigation In addition, there is the International Federation of Air Traffic Safety Electronics Associations (IFATSEA). Fifteen ANSPs from 12 Member States are involved in EUROCAE. There are also some EU agencies, such as the European Union Aviation Safety Agency (EASA) and Eurocontrol, that operate as employers of air traffic control officers. There may be some employees in air traffic management activities who are directly employed by EASA and Eurocontrol. Thus, they are direct employers of air traffic management employees, without taking the role of European employer organisations. Furthermore, some interests of the ANSPs are coordinated in these European organisations. CANSO, however, is the only European organisation that represents ANSPs as employers at European level.

Comparative overview of European associations in civil aviation

European trade unions ETF and ECA represent the pilots and cabin crew from, respectively, 16 and 18 Member States in the civil aviation sector on the ESSDC. EurECCA also has some representativeness in six Member States, but is not represented on the ESSDC. On the side of the aircrew employers, ERA has affiliates in 15 Member States, followed by ENAA and AIRE, each of which has affiliates in 9 Member States, and A4D with affiliates in 3 Member States. When only considering the Member States where the organisations have affiliates involved in collective bargaining, ETF has 15 affiliates in Member States, ECA has 14 and EurECCA has 6. 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 in the main report); Ryanair provided information (shown in Table 84 of the main report) stating that it operates as an employer of aircrew in 22 Member States; Table 87 of the main report shows the two Member States where it is involved in social dialogue or collective bargaining shaping the working conditions of aircrew. Because this information was only provided when the study had been finalised, it could not be checked and confirmed within the scope of the study.

For employees in air traffic management activities, ETF and ATCEUC are the most representative European trade unions. CANSO represents employers in all Member States. ACI Europe-affiliated air traffic management 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 air traffic management 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 Europe has affiliates in 26 Member States, ERA in 15, ASA in 10, ENAA in 8, AIRE in 5 and A4D in 3. Table 5 presents summarised findings for each activity group. More detailed data for each of the 27 EU Member States can be found in Tables 124–126 of the main report, which provides information according to each activity group (aircrew, air traffic management and ground handling activities).

Table 5: Landscape of European organisation in the three areas of the civil aviation sector

Category	Representing aircrew employees and employers	Representing air traffic management employees and employers	Representing ground handling employees and employers
European trade unions	ETF (16 Member States; collective bargaining in 15) ECA (18 Member States; collective bargaining in 14) *EurECCA (7 Member States; collective bargaining in 6)*	ETF (21 Member States; collective bargaining in 20) ATCEUC (19 Member States; collective bargaining in 17)	ETF (21 Member States; collective bargaining in 19)
European employer organisations	ERA (15 Member States; collective bargaining in 11) ENAA (9 Member States; collective bargaining in 9) AIRE (9 Member States; collective bargaining in 4) A4D (info not available)	CANSO (all 27 Member States; collective bargaining in 23) ACI (6 Member States; collective bargaining in 4) ERA (3 Member States; collective bargaining in 3)	ACI (26 Member States; collective bargaining in 19) ERA (15 Member States; collective bargaining in 13) ASA (10 Member States; collective bargaining in 5) ENAA (8 Member States; collective bargaining in 8) AIRE (5 Member States; collective bargaining in 3) A4D (3 Member States; collective bargaining in 3)

Notes: *EurECCA is in italics because it is not a European social partner organisation participating in the ESSDC.*
Source: *Summary of Tables 56, 57 and 58 of the main report on civil aviation*

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This document examines the process of assessing the representativeness of the actors involved in the European sectoral social dialogue committee for the civil aviation sector. It summarises the findings from a comprehensive study on representativeness in this sector (see web link in 'Further information' below). The 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.

About representativeness studies

Representativeness is a criterion used by the European Commission to identify the 'management and labour' whom it must consult under Article 154 of the Treaty on the Functioning of the European Union (TFEU), and who may initiate social dialogue leading to Council decisions under Article 155 of the same treaty. In 2006, the Commission mandated Eurofound to carry out studies on the representativeness of European sectoral social partner organisations.

These representativeness studies are designed to provide basic information needed for the setting up and functioning of sectoral social dialogue committees at European level. The sectoral social dialogue committees are the mechanism used by the Commission to consult management and labour under Article 154 TFEU.

Further information

The report *Representativeness of the European social partner organisations: Civil aviation sector* is available on the Eurofound website at https://www.eurofound.europa.eu/observatories/eurwork/representativeness-studies

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