

CA = Collective Agreement

CB = Collective Bargaining

EO = Employers' Organisation

VIRAL IR in aviation pre-Covid-19		Denmark	France	Germany	Italy	Ireland	Poland	Spain
1	The main actors in aviation							<p><b>The state:</b>                      The exit of IBERIA from public capital, and its integration into the IAG group, means that there are no flag carrier airlines in Spain. Notwithstanding the above, public aid has had an important promotional function and has reached all companies in the sector, including low-cost airlines. However, the vast majority of air traffic control activities, as well as the ownership and management of airports for commercial aviation, remain</p>

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							<p>in the hands of the State.</p> <p><b>Trade unions:</b></p> <p>CCOO and UGT have a significant presence in the value chain of the sector, although with little representation in the airlines themselves, where the unions of pilots and flight crews have more influence.</p> <p>SEPLA due to its status as the majority union in the group of airline pilots, has union sections in all the airlines.</p> <p>STAVLA the most representative airline in some airlines such as Iberia and Vueling.</p>

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							<p>The field of air traffic control is highly fragmented and there are a variety of unions (OCCA; SPICA), but by far the most representative is USCA.</p> <p><b>Employers' organisations:</b></p> <p><b>ALA</b> Although it groups most of the airlines, it is not involved in industrial relations. The leading role in industrial relations is played by companies</p> <p><b>ASEATA</b> is an employers' organization that brings together companies dedicated to providing handling services for third parties. The</p>

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							<p>main companies in the subsector, such as IBERIA and GROUNDFORCE, form part of this association. Other airlines, RYANAIR and EASYJET, would be the main operators in the self-service format.</p> <p><b>ENAIRE</b> is a public company that provides air navigation services in almost all Spanish airports.</p> <p>Airlines by volume of passengers in 2019 would be the following:  RYANAIR (43.704.621)  Grupo IBERIA (16.982.210 + 6.238.218 Iberia Express)  VUELING (29.076.503)</p>

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								<p>EASYJET (17.860.171)</p> <p>AIR EUROPA (13.075.556)</p> <p>TUI Group (10.150.729)</p> <p>Norwegian (8.333.619)</p> <p>Jet2.com (8.035.409)</p> <p>Eurowings (5.617.964)</p>
2	2a: Financial situation in aviation							<p>Ryanair closed the year 2019 with profits 4.2% higher than the previous year. Obtained a net profit of 88 million euros in the last fiscal quarter of 2019 (from October 1 to December 31, 2019)</p> <p>VUELING achieved profits of 132 million euros in 2019, compared to 149 the previous year.</p> <p>IBERIA achieved profits of 497</p>

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							million euros, an increase of 60 million over the previous year.
2b: Employment in aviation							<p>In 2019, the Spanish air transport sector employed approximately 34,169 people within the Spanish market, which represented an increase of more than 1,600 workers compared to 2018.</p> <p>VUELING employed 3,278 people, a figure that increases by 204 those employed in the previous year.</p> <p>IBERIA employs 17,458 people, a figure that increases by 490 those employed in the previous year.</p>

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3	<b>Form of employee representation</b> a) Union rep b) Works councils c) Both?							<p>Although the general rule of predominant representation through work council, with strong union influence, is followed in the sector as a whole, there is significant union representation among pilots, cabin crew and air traffic controllers.</p>
4	<b>Union density</b>							<p>Union density in the aviation sector is much higher than in other sectors. Among the pilots, the union density, in some companies such as IBERIA, reaches 100%. In the rest of the professions, the union density is also very high, although these figures are not reached. As an example, also in IBERIA, the ground staff</p>

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							reaches densities of 63.55%, while the cabin crew TCP shows a much lower rate of 33%.
Employers' organisation rate							The structure of collective bargaining, geared towards the company level, reduces the relevance of employers' organizations. A notable exception occurs with respect to Handling companies, the majority grouped around the ASEATA organization. Something similar happens with the sectoral negotiation of private air traffic control, negotiated on the business side by APCTA.
Collective bargaining coverage							The high rates of union density



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								and the specificity of the structure of collective bargaining help to guarantee a high degree of coverage of collective bargaining, which reaches 100% of companies and workers. As an exception to this, Ryanair maintains an open conflict with the union representatives of the majority of the workforce, although it has reached an agreement with the pilots.
5	The role of the state in aviation							The vast majority of air traffic control activities, as well as the ownership and management of airports for commercial aviation, remain

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								in the hands of the State.
<b>6</b>	<b>Legislation that affects aviation</b>							There are non-strictly labour regulations for the sector that indirectly affect the management of the sector from this perspective, for example, regulations on occupational risk prevention and safety or regulations on academic qualifications for those who have to perform certain tasks in commercial aviation (pilots, air traffic controllers), regulations on compulsory retirement of pilots, regulation on working time, etc)
<b>7</b>	<b>Organisation of collective bargaining (sector/branch/company)</b>							With the exception of the sectoral agreement in the handling

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								activity and in the activity of air traffic control by private companies, collective bargaining in this area shows an almost exclusive prominence of company agreements, pilot agreements, cabin crew agreements, and traffic control agreements.
<b>7a</b>	<b>Ryanair's approach to collective bargaining</b>							Have signed a collective agreement with pilots.
<b>8</b>	<b>Balance of power between employee representatives and employers? (agreements, possible concession bargaining - differences btw. legacy airlines and Ryanair)</b>							The strong trade union membership has allowed the development of numerous negotiation processes that have enabled a broad restructuring process to be

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								tackled without major conflicts. At the same time, the emergence of new companies, with clearly lower standards of working conditions, has been favoured by the lack of workers' representation and the high degree of decentralisation of collective bargaining.
9	<b>Tensions and conflicts in aviation pre-2020</b>							There have been recurrent conflicts in the major airlines and, to a lesser extent, in the new entrants. In any case, the toughest conflict was led by air traffic controllers in 2010.
10	<b>Changes from 2010 to 2020</b> <ul style="list-style-type: none"> <li>• Power balance btw. employers('organisation) and unions)</li> <li>• Centralization/decentralization</li> </ul>							The 2012 labour reform, which, among other matters, modified the legal regulation

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							<p>of the structure of collective bargaining, has not had a significant effect in this area, as it was already a sector with a high degree of decentralisation.</p> <p>Within this framework of transformation, both the emergence of new companies and the disappearance of the dominant position and privatisation of the public company that for many years almost monopolised the airline industry, has facilitated the loss of the intense bargaining power that for years the trade union organisations that form part</p>

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							of this sector have exercised.