

CA = Collective Agreement

CB = Collective Bargaining

EO = Employers' Organisation

VIRAL IR in aviation pre-Covid-19		Denmark	Germany	Ireland
1	The main actors in aviation	<p>The state: <i>CPH airport:</i> Owner till 1994 – as of 2019, the state owns 39.2 % of CPH <i>SAS:</i> The state was owner (w/Sweden and Norway) until 2001, after that owner of stocks in SAS (Denmark 14.2 % – Sweden 14.8 %, Norway is out)</p> <p>Employers' organisations: <i>Confederation of Danish Industry</i> (Dansk Industri, DI): Est. 20 member companies in aviation, covering est. 35,000 employees</p> <p>Trade unions aviation: <i>Union of Airline Staff</i> (Flyvebranchens Personale Union, FPU) Pilots and cabin crew, from nine airline; est. 1,500 members, 70% organization rate Density with regard to the union domain 70 % Estimated 1,500 members</p>	<p>The state: Until 1997 Lufthansa was partly state owned, now totally privatized. In the case of airports, a more complex picture emerges, with all the main hubs only partly privatized. The local Länder (States) remain the majority shareholder. Interestingly, though, on average around 20 of ground services are provided by third parties.</p> <p>Trade unions: Aviation is home to a new development in German IR, employees organized in professional unions in some branches – aviation being one such branch. The two main unions are VC (pilots) and UFO (cabin crew mainly within the Lufthansa Group). The other union, Ver.di organizes a limited number of Lufthansa cabin crew, has been quite successful at organizing Ryanair cabin crew. Ver.di is also the union that organizes airport ground staff. With regards the employer side, Condor, Tui, Lufthansa, Lufthansa</p>	<p>The State: <i>Airports:</i> Ireland has three State Airports - Dublin, Cork and Shannon Airports which are commercial Semi State Companies (owned by the State, but technically commercially run). Daa (Dublin Airport Authority) owns and manages Dublin and Cork airports (Daa also has international airport operations and investment, and a travel retail subsidiary with outlets across the world).</p> <p><i>Flagship carrier:</i> Aer Lingus was established as Ireland's national flag carrier. The State maintained almost total control</p>

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	<p><i>Danish Air Traffic Controllers Association (Dansk flyvelederforening, DATCA)</i> Est. 300 members, organizational rate 100 %</p> <p><i>Cabin Attendants Union (CAU)</i> Est. 1,550 members SAS cabin crew; pursers, stewards and stewardesses, organizational rate 95 %</p> <p><i>Danish Airline Pilot's Union (Dansk Pilot Forening, DPF):</i> SAS-pilots, 600 members, SAS pilots, organizational rate est. 100 %</p> <p><i>United Federation of Danish Workers (Fagligt Fælles Forbund, 3F)</i> Est. 5,000 members in the sector; transport workers, handling assistants in airports; organizational rate est. 75 %</p> <p><i>Danish Metalworkers' Union (Dansk</i></p>	<p>Cargo and Eurowings are members of the Bundesverband der Deutschen Fluggesellschaften (BDF). The BDF is not a collective bargaining body, though. Its main task is lobbying.</p> <p>Airports: Arbeitsgemeinschaft Deutscher Verkehrsflughäfen represents the interests of German airports (21 City airports and 8 regional airports). Again, though, its main task involves lobbying on the airports behalf. The Arbeitgeberverband der Bodenfertigungsdienstleister der Luftverkehr (ABL). ABL lobbies on behalf of private third party companies that provide ground services at airports. ABL has 6 members AHS, Losch, Swissport-Losch, Wisag, Aviapartner and Acconia.</p>	<p>of the airline until 2006 when it was floated on the stock exchange. The State's stake was reduced to 25%. In 2015 Aer Lingus became a wholly owned subsidiary of International Airlines Group (IAG).</p> <p>Employers: Ryanair was founded in 1985, and is headquartered in Dublin. It has become one of the largest carriers in Europe, and has transformed the aviation industry with its 'low cost model'. Ryanair tried, unsuccessfully, to buy Aer Lingus on a number of occasions between 2006-2015. When Aer Lingus was sold to IAG in 2015, Ryanair had a stake of over 29% in Aer Lingus. Ryanair's offer to the State to</p>

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	<p><i>Metalarbejderforbund, Dansk Metal)</i> Technicians and flight mechanics; organizational rate est. 80 % (estimated); est. 1,000 members (new development in 2021: Many SAS pilots now also members of Danish Metalworkers' Union)</p> <p><i>Union of Commercial and Clerical Employees in Denmark (Handels- og Kontorfunktionærernes Forbund, HK)</i> Est. 1.950 members in the sector (members of HK/Private); salaried employees, white-collar, commercial and clerical workers; Merged with <i>Federation of Salaried Employees in Air Transport (Luftfartsfunktionærerne, LFF) in 2008.</i> organizational rate est. 45-50 %</p> <p><i>Danish Union of Electricians (Dansk EI-Forbund, DEF)</i> 76 members, according to administrative data; organizational rate est. 80 %</p>		<p>build, and operate, a new terminal at Dublin Airport in 2006 was rejected, and the Irish airports remain under State control.</p> <p>Trade Unions: There is no compulsory membership in the trade unions in the aviation sector. There has always been a strong tradition of trade union membership in the state-owned Daa, and in Aer Lingus. Strong resistance towards trade union membership was traditionally evident in Ryanair, until the company decided to recognise trade unions for the first time in late-2017.</p> <p>The Fórsa trade union was established in 2018 following the amalgamation of three unions (the</p>

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	<p><i>Danish Association of Managers and Executives (Ledernes hovedorganisation, Lederne)</i></p> <p>Est. 600 members in Copenhagen Airport. (The members in the others Danish airports are registered under a single group called 'transport', which means that they cannot be registered separately). Lederne has an estimated 600 members in all other airports in Denmark. Thus, in total, it has an estimated 1,200 members in the sector.</p>		<p>Irish Municipal Public and Civil Trade Union (IMPACT), the Civil, Public and Services Union (CPSU), and the Public Service Executive Union (PSEU)). The Irish Airline Pilots' Association (IALPA) is a branch of Fórsa and represents unionized pilots in Aer Lingus and Ryanair. The services and enterprises division of Fórsa, also represents most unionized cabin crew at Aer Lingus and Ryanair.</p> <p>Ireland's largest union, the Services, Industrial, Professional and Technical Union (SIPTU) represents a broad range of employee categories, including most unionized ground staff in Aer Lingus.</p>

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				Both Fórsa and Siptu are members of the Irish Congress of Trade Unions (ICTU); however, the pilots (through IALPA) traditionally conduct negotiations separately to the other ICTU unions.
2	2a: Financial situation in aviation	<p>From mid-90's onwards fierce competitions, especially putting pressure on the dominating legacy airline SAS. Prices on airline tickets have gone down, and recurrent saving plans have been implemented from mid-1990's onwards.</p> <p>At the same time, CPH Airport has grown from 18 million passengers in 2002 to 30 million per year. CPH is an important hub in Scandinavia, not least for connecting flight, and CPH Airport has prospered.</p> <p>CPH Airport was privatized in 1994 and SAS in 2001.</p>	<p>Lufthansa Group controls the largest share of the German passenger market, 56%, followed by Ryanair, 8.4%. Lufthansa transported over 145 million passengers in 2019. Combined, other key players, these include Qatar, Emirates, United, China Air and Turkish Air, control 27.9% of the market. Personal costs represent 23% of Lufthansa's total costs. Twice as high as Ryanair, 11%. The basis salary of Lufthansa cabin crew is 20.000 Euro, Ryanair 12,000 Euro. In response to such competition, the Lufthansa Group now owns low-cost airlines such as German and Eurowings. Also, wet and dry leasing is an integral part of Lufthansa's strategy.</p>	<p>As an Island nation, civil aviation is vital to Ireland. Ireland is also home to Ryanair, Europe's largest airline, which has its HQ in Dublin. In 2019, before COVID-19, Ireland was the 16th largest in the aviation market in Europe by total seat capacity (source: CAPA, OAG), significantly above its ranking as Europe's number 26 nation by population (source: CAPA; worldometers.info).</p> <p>Ryanair, with its low-cost model, has transformed civil</p>

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		<p>In terms of airports, Frankfurt, the home of Lufthansa, is Germany's largest airport. In 2019, just under 5 million passengers either flew from or landed in Frankfurt. Altogether over 243 million passengers travelled to and from German airports – just under three times the people living in Germany and nearly double the number of passengers in 2021.</p>	<p>aviation in Ireland (and Europe). Aer Lingus was privatised in 2006, underwent significant restructuring, and became part of the IAG group in 2015.</p> <p>Dublin Airport hosted a total of 32.9 million passengers during 2019, setting a new record for traffic at the airport. In 2019, it was the tenth largest airport in Europe, and the fifth largest transatlantic connectivity (dublinairport.com). A significant factor is the availability at Dublin (and Shannon) Airport of 'immigration pre-clearance' for flights to the US. A second terminal (T2) was completed in 2010.</p>
2b: Employment in aviation	<p>As of 2019, some 25,000 are employed in CPH airport including all support functions. The</p>	<p>According to the Bundesverband der Deutschen Fluggesellschaften 825,000</p>	<p>It is estimated (by IATA) that Airlines, airport operators, airport</p>

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	<p>airport is servicing some 30 million passengers/year. An est. 1600-1700 employees are working in Billund Airport. The airport itself employs app. 800 and 800-900 are employed in other companies active in the airport. The airport serves 3.6 million passengers as of 2019 While SAS had some 35,000 employees in the start-1990's, in 2019 some 10,000 was employed in SAS and ¼ of the routes were wet- or dry-leased abroad. As Ryanair has no bases, they have no employees in Denmark.</p>	<p>employees are employed in the German aviation industry, of which the Lufthansa group employ just over 130,000 people.</p>	<p>on-site enterprises (restaurants and retail), aircraft manufacturers, and air navigation service providers employ 39,000 people in Ireland.</p> <p>Daa has 3,000 employees working in airport management and operation, domestic and international airport retail management, and aviation consultancy service. It is estimated that about 21,500 jobs are directly related to Dublin airport operation in areas such as airport security, airline operations, ground handling firms, immigration, customs and air traffic control.</p> <p>Aer Lingus has approx.. 4, 000 employees. The number of direct employees Ryanair</p>

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				has based in Ireland is difficult to estimate with certainty, but seems approximately 2,500 (it employs approx. 17000 in total).
3	Form of employee representation a) Union rep b) Works councils c) Both?	<p>Most companies in aviation are large and fulfill the requirements to a) have a shop steward (five employees or more and/or b) to have a cooperation committee (works council).</p> <p>Hence, most employees in companies and airlines with bases in Denmark have trade union representation as well cooperation committees.</p>	<p>Within the Lufthansa Group and main hub airports (key German cities) union and works council representation is widespread. In the case of Ryanair and regional airports Ver.di and VC have had some success in achieving union recognition and setting up works councils. Such an arrangement appears fragile, though, as Ryanair in response to such moves has switched operations outside of Germany – the point in case here being Bremen.</p>	<p>Employers in Ireland have no legal obligation to recognise/ collectively bargain with trade unions. As noted, employees in Aer Lingus and Daa have traditionally been represented by trade unions.</p> <p>Ryanair was traditionally a non-union company, until late 2017, when it announced it would recognize pilot trade unions, and enter into collective agreements. Previously, Ryanair had insisted it negotiated only with its Employee</p>

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				<p>Representative Committees (ERCs); these are non-union, bodies comprised of employee representatives, selected by the employees. Since this decision, Ryanair has begun negotiating collective agreements with cabin crew (represented by Fórsa).</p> <p>Internal Dispute Resolution Boards (IDRBs) established in Aer Lingus and Daa.</p>
4	Union density	<p>Aviation: SAS-unions: 95-100 % Other companies/unions: 10-90 % Ryanair employees: N/A</p> <p>Ground staff: 50 to 80 % (See 'Actors' above)</p>	<p>Aviation: High, above 80% amongst pilots (VC) within all airlines and possibly even higher amongst Lufthansa pilots. Cabin crew, UFO, has a density rate of around 25% across all airlines, is specifically higher, above 70% within the Lufthansa Group. Within non-German airlines, e.g. Ryanair it is low. Ver.di, though, appears to have made some in-roads,</p>	<p>Precise figures on union density in aviation are difficult to ascertain. There is a tradition of trade union membership in Aer Lingus and Daa (given their State-owned history). In very recent times, trade unions have been recognised by Ryanair.</p>

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		<p>although limited, in organizing Ryanair cabin crew.</p> <p>Ground staff: Ver.di's organization of ground staff is reported to be above 50% nationally, and at the larger airports above 60%.</p>	
Employers' organisation rate	High 80-100 percent	High 80-100 percent	As noted above, there is no overall sectoral employer representative body, although Aer Lingus is an Ibec member.
Collective bargaining coverage	<p>High 80-100 per cent in aviation as well as ground staff</p> <p>Ryanair: 0 per cent</p>	<p>Within Lufthansa high, 80-100%.</p> <p>Ryanair low.</p> <p>In terms of pilots, cabin crew and ground staff company level collective bargaining is the dominant form. Huge discrepancies prevail, though. Within partly state owned airports, collective bargaining remains solid. Also in the non-low-cost airlines unions are recognized as bargaining parties, here collective bargaining is solid, too.</p>	<p>As a result, it is difficult to ascertain collective bargaining coverage in aviation in Ireland. This was traditionally relatively high in Aer Lingus and DAA, and non-existent in Ryanair until very recently.</p> <p>Estimates as of early 2020, pre-pandemic, seemed to suggest that roughly 60% of ground staff (including air traffic management) in the sector were</p>

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				<p>covered by collective agreements. For pilots and cabin crew, the coverage was estimated at about 80%. Therefore, of course, we can infer density levels are lower than these coverage figures (these figures would exclude Ryanair, of course).</p> <p>Prior to Covid bargaining in the Daa and Aer Lingus was largely conducted via the 'Group of Unions' (all the unions recognised by the employers) under the auspices of ICTU.</p>
5	The role of the state in aviation	<p>State has limited influence on IR in aviation. However, the state has had considerable influence on aviation as infrastructure until 1990's. CPH Airport owned by the state until mid-1990's – then sold as</p>	<p>In response to the EU's liberalization of aviation, the state oversaw the full privatization of Lufthansa. Regarding airports, a public/private approach was mainly adhered to, with the states appearing to retain a controlling stake in the main hubs, Berlin, Hamburg, Frankfurt, Dusseldorf and</p>	<p>In response to the EU's liberalization of aviation, the state oversaw the full privatization of Aer Lingus.</p> <p>The State retains control of the key airports (at Dublin, Cork, and Shannon)</p>

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		stocks to among other equity fond SAS owned by Denmark, Sweden and Norway 2001, when it became a joint stock company, however still owned 50 % by the three States.	<p>Munich. In the case of Frankfurt, Fraport Plc, the following arrangement exists: Hessen 31%, City of Frankfurt 20%, 49 % in private hands – 5% of which Lufthansa controls.</p> <p>The ownership structure of Munich is an interesting case, though. The state the sole owner; Bavaria 51%, City of Munich 23% and the German Government 26% - 100% state owned.</p>	although these are managed by the semi-state Daa.
6	Legislation that affects aviation	Legislation is comprehensive regarding the formal rules and procedures for aviation but very little legislation affecting working conditions in the Danish aviation industry as this is governed in the collective bargaining system.	In 2019, the state altered the Works Constitution Act to allow employees working for airlines to set up works councils. Prior to 2019, seafarers and aircraft crew were only allowed access to such a body if negotiated by collective bargaining, a strange anomaly of the German IR system.	There is no specific legislation applying to industrial relations in Aviation.
7	Organisation of collective bargaining (sector/branch/company)	Aviation: While the labour market in Denmark generally is dominated by branch and sector unions, in <i>aviation</i> there are a mix between branch unions and kind of company unions. 'Company unions' exist in legacy airline SAS, As such, union structure in	Aviation: Company level, the opposite of traditional arrangements within German IR, is where CB takes place within airports and airlines. Airports. Although employer association membership is high, these organizations play a lobbying and not negotiating role.	As is the usual case in Ireland, collective bargaining takes place at company/ enterprise level.

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		<p>aviation is somehow fragmented, but still adhering to the Danish IR model with unions negotiating on behalf of staff.</p> <p><i>Ground staff</i> is organized along traditional branch/sector lines.</p>		
7a	Ryanair's approach to collective bargaining	<p>Ryanair have never engaged in collective bargaining in Denmark. Even though having a base in Billund 2012-15, Ryanair has denied engaging in CB. After a ruling in Labour Court forcing Ryanair to engage in CB in CPH, Ryanair withdrew from BLL as well as CPH. As of 2019, Ryanair still had not engage in CB, though discussion is taking place with FPU.</p>	<p>Mixed. Have signed a few collective agreements acknowledging Ver.di (cabin crew) and the VC (pilots) bargaining partners.</p>	<p>Ryanair was (seemingly) implacable opposed to collective bargaining in Ireland. Indeed, a seminal Supreme Court regarding collective bargaining (in 2007) was taken by Ryanair (against the Irish Labour Court).</p> <p>The company performed a dramatic about-turn at the end of 2017, and announced it would engage in collective bargaining with trade unions. This was initially in respect of directly-employed pilots, but the company has entered into</p>

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				collective bargaining with the Fórsa trade union in respect of cabin crew also. In 2018, Fórsa signed a recognition agreement with two cabin crew agencies which provide cabin crew to Ryanair.
8	Balance of power between employee representatives and employers? (agreements, possible concession bargaining - differences btw. legacy airlines and Ryanair)	<p>Aviation: Fierce international competition has forced airlines to employ recurrent saving plans and hence unions to accept successive concession bargaining rounds, especially in the legacy airline SAS. However, as airlines are under constant pressure, employers are not getting stronger vis-à-vis unions. While not having bases in Denmark, Ryanair is never the less flying in and out of CPH with some 2.4 million passengers (2019), making Ryanair the 3rd biggest airline operating in CPH, thereby and showing unions that Ryanair can operate just</p>	<p>Aviation: Balance of power seems to constantly swing back and throw between employers, certainly in the case legacy airlines, in the last twenty years. Although in the early 2000s VC, Verdi and UFO recorded significant wins, mainly involving Lufthansa, regarding union recognition, pay and terms and conditions, between 2012-2014 employers appear to have crawled back some of their earlier losses, especially in the area pensions. Certainly, the bitter battles with Lufthansa has undermined the German notion of social partnership. Relations remain quite frosty. Regarding Ryanair relations have never been anything else than arduous, Ryanair</p>	<p>Aviation: Aer Lingus underwent a period of significant restructuring during the early 2000s, which resulted in a survival plan (the 'Greenfield Plan') being agreed by management and unions in 2010. The plan included voluntary redundancies, pay cuts, a pay freeze, new rosters and new work practices. Fortunes improved at the company over subsequent years, although cost-cutting measures continued to be a recurring and IR</p>

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	<p>fine w/o conceding to CB.</p> <p>Ground staff: Ground staff are much less exposed to international competition and are not engaging in concession bargaining.</p>	<p>refusing to recognize unions or concede to the setting up of works councils. More recently, though, both Ver.di and VC have made some slight inroads, sitting down with the company to discuss union recognition and the possibility of entering into negotiations. Interestingly, Ryanair has insisted these negotiations take place in Dublin.</p> <p>Ground staff: In the case of ground staff at airports, many who work still work for partly state owned enterprises, relations appear to have remained cordial. It is even hoped that the employers will soon agree to enter into some form of branch level collective bargaining.</p>	<p>remained poor. There was initial resistance to the IAG takeover, and concerns linger about outsourcing plans.</p> <p>The situation in Ryanair was transformed utterly by the decision of the airline to recognize trade unions in 2017; after a virulently non-union stance had been adopted until that point. The negotiations between Fórsa and Ryanair have not been smooth, but both sides are still attempting engaged in collective bargaining negotiations.</p> <p>A bitter dispute over a huge deficit in the pension fund of employees of Daa and Aer Lingus was a point of some controversy for many years (with a</p>

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				<p>court ruling on one aspect of the issue delivered in 2020, despite legislation to address the issue being introduced in 2014).</p> <p>Ground staff: Relationships between the main union, Siptu, and the employers (Daa and Aer Lingus) have often been adversarial (as is typical of the Irish model).</p>
9	Tensions and conflicts in aviation pre-2020	<p>Aviation: The recurrent saving plans especially in SAS led to recurrent conflicts and strikes, though very short and often solved quite fast. Generally, the trust level between employees and management in SAS has deteriorated ever since beginning of 2000's due to constant cuts in wages and working conditions.</p> <p>Ground staff: From time to time, luggage handlers have been on strike, but most often for just a few</p>	<p>As indicated above relations between union and airlines, including the Lufthansa Group have been marked by a long series of industrial disputes. In fact, the spike in strikes in Germany in recent years can in part has been put down to tensions within the aviation industry.</p>	<p>Industrial Disputes: Levels of industrial action Ireland are relatively low by European standards. There have been relatively few large-scale disputes, but the threat of strike action by unionised Ryanair pilots in December 2017 is widely seen as influential in the airlines decision to recognize trade unions in Ireland.</p>

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	<p>hours. However, mostly, industrial peace prevails in ground functions.</p>		<p>(In 2010, the ICTU lodged a complaint with the ILO centred on alleged anti-union behaviour and refusal to engage in good faith collective bargaining by Ryanair, and the failure of Irish law to address these issues).</p> <p>At Aer Lingus the IAG takeover in 2015 prompted fears of outsourcing, but, by and large, recent disputes have been resolved (sometime with the aid of the State's third-party dispute resolution bodies- The Workplace Relations Commission and the Labour Court).</p> <p>Other tensions: The issue of 'bogus self-employment' has been the focus of considerable attention in recent</p>

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				years. Some of this has focused on Ryanair's model of employment, whereby only (approx.) 25% of its Irish pilots are directly employed. Some are engaged via personal service companies or employment agencies; the former issue, in particular, has come under some scrutiny.
10	<p>Changes from 2010 to 2020</p> <ul style="list-style-type: none"> • Power balance btw. employers(' organisation) and unions) • Centralization/decentralization 	<p>Aviation: The balance btw. employers and unions has not changed significantly over the last decade until 2020. Both have been under pressure, and while unions have engaged in concession bargaining, employers do not seem to have profited from this as they have been forced to engage in saving plan.</p> <p>Ground staff: Power balance is unchanged from 2010 to 2020.</p>	<p>The arrival of Ryanair and state owned airlines, which has meant increased competition, to an extent has seen the aviation industry break with the traditional components of German industrial relations model, centralized collective bargaining, industrial piece/stability, influential works councils and a culture of working together.</p>	<p>There has not been a significant change in the relationship between employers and employees over the past decade, where unions were traditionally engaged in collective bargaining. This has largely continued (in a traditional, rather adversarial fashion). However, at both Aer Lingus and Daa, unions have, especially earlier in the</p>

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				<p>decade, been fighting a rearguard action, with a number of restructuring and recovery plans required.</p> <p>In Ryanair, there has been a seismic and fundamental shift from the airline refusing to negotiate with trade unions, to it entering into collective agreements Fórsa.</p>