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COMMISSION STAFF WORKING DOCUMENT

**Impact assessment of the Single Aviation Market on employment and working
conditions for the period 1997-2007**

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INTRODUCTION

The European project does not only translate as economic progress but also as social progress within the Member States: since its inception, the Community has included in its objectives the constant improvement of Europeans' living and working conditions. In this context, the aviation sector must be seen as an economic activity which, following the implementation of the single market, has undergone profound changes over recent years. While the economic development is generally well documented, it is necessary to take stock of the social progress; the objective of this document is to assess the impact the single aviation market has had on employment and working conditions over the period 1997-2007.

The social dimension of the single aviation market should first be looked at from a general perspective. Air transport, by definition, has an international dimension and external elements, such as the economic climate, technological advances or acts of terrorism, have as much impact on its development as regional initiatives such as the single aviation market.

However, the key role played by the single market in the aviation sector's progress in Europe seems obvious. Between 1997 and 2007 European air transport underwent, and is still undergoing, a profound transformation that redefined the outlines and prospects of the whole sector. Community impetus, with the creation of the single aviation market, triggered this transformation. The objective of the provisions of the 'Third Package'¹ was to lead to a progressive liberalisation, from 1993 to 1997, of air services within the European Union and to end both quantitative restrictions on flights and price caps on carriers' fares, while at the same time promoting the free movement of capital.

The notion of State air carriers focused on their national market quickly gave way to a transnational approach marked by the emergence of 'low-cost' carriers² and by Community-wide mergers/acquisitions. A key event took place in 1997 when the number of intra-Community routes³ overtook domestic ones and steadily continued to grow over the following decade. It was also in 1997 that the single market became a reality when the last access restrictions to the Member States' aviation market were removed and cabotage rights were opened up.

Within a few years, the single aviation market - almost 520 million passengers⁴ on intra-European routes each year - has drastically changed the air transport sector in Europe and has had a decisive influence on all workers in this sector⁵.

The objective of this Commission staff working document is to provide information to assess the impact on employment of the single aviation market over the period 1997-2007. This first

¹ Council Regulations (EEC) No 2407/92, 2408/92 and 2409/92, recently recast and consolidated into Regulation (EC) No 1008/2008 of the European Parliament and of the Council of 24 September 2008.

² As there is no clear definition for low-cost carriers, this document will only take into consideration carriers which define themselves as such and which formed the European Low Fares Airline Association (ELFAA).

³ Air routes between two Member States rose by 120% between 1992 and 2008.

⁴ 790 million passengers were transported in Europe in 2007, 520 million of whom to European destinations.

⁵ It is estimated that the number of jobs directly or indirectly dependent on the air transport sector is 3.2 million, which represents 3% of the active European population. However this document only deals with the workers directly dependent on the sector - around 670 000 jobs.

assessment of the single market's social dimension focuses on analysing how employment has evolved in the aviation sector and how employment and the social standards regulating it have changed.

This document is the result of consultations with various economic players (airports, air carriers, etc.), workers' associations and professional associations but also with Member States⁶ aviation authorities carried out by several consultants on the Commission's authority⁷. Consolidation and analysis of the data collected form the basis of this working document. Its limitations are due to the weakness of the statistics available and to the lack of any previous exhaustive study on these issues; they are particularly obvious when it comes to the qualitative aspects of employment and to indirect employment generated by air transport. They are also due to the difficulty of isolating the effects of the single market from the overall evolution of air transport, which, by definition, is global, as aviation sector companies' European and international activities are very often interwoven. Finally, as the employment data were collected from the aviation authorities in 2008, the impact of the economic and financial crisis (and of the remedial measures taken) on activity and employment in the aviation sector cannot be assessed. In any case and despite these limitations, this document attempts for the first time to give estimates and an overall analysis of the social consequences of the single aviation market.

This document highlights the positive impact the single aviation market has had on direct employment over the period 1997-2007 (I) but also the profound transformation of employment and industrial relations in the aviation sector (II) which shows the importance of the applicable social standards (III).

1. POSITIVE IMPACT OF THE SINGLE AVIATION MARKET ON EMPLOYMENT IN THE AVIATION SECTOR FOR THE PERIOD 1997-2007

The objective of this Commission staff working document is to assess the impact of the single market on employment in the 27 European Union Member States and Switzerland over the period 1997-2007. Only direct employment in the aviation sector is covered, i.e. air carriers and airport workers, flight navigation service providers, independent groundhandling service providers and maintenance company workers, as it is extremely difficult to assess all the jobs generated by the aviation sector even if they no doubt exceed the direct employment.

In any case, the increase in traffic, helped by the implementation of the single market, has enabled the number of jobs in the sector to rise. This evolution however does not reflect differences between the various professional categories.

1.1. A general upward trend in employment linked to increased traffic in the single market

This working document conservatively estimates that, for 2007, 676 000 people were directly employed by the aviation sector in Europe (see Annex 1). Over the period studied

⁶ A detailed questionnaire was sent to all the Member States' aviation authorities in September 2008 in order to collect quantitative and qualitative information.

⁷ This work was carried out by Ecorys consultants in December 2007 and by Booz&Co in June 2009. Both these reports are available from the DG MOVE website: http://ec.europa.eu/transport/air/studies/internal_market_en.htm

(1997-2007) the number of workers in the aviation sector has risen, which is linked to the increase in traffic due to the implementation of the single market.

- **Evolution of direct employment in the aviation sector**

In 2007, out of the 676 000 jobs depending directly on the sector, 426 000 depended on air carriers. Available figures show that this number marks a 6% increase in employment by air carriers compared to the situation in 1997 and represents 25 000 new jobs.

This progression in direct employment by air carriers has not been linear. Available figures for employment by air carriers show that the main increase in the number of staff took place immediately after the single market opened before falling at the beginning of the 2000s, particularly after the September 2001 attacks; however, from 2005, it began to rise again (see Annex 2).

This growth in direct employment by carriers is not the same in all countries and does not reflect the very different situations from one State to another, which can be due to bankruptcies, restructuring plans or even the emergence of new carriers.

Finally, it should be stressed that these figures account only for direct employment by carriers but that over the period studied there have been several important outsourcing processes which have helped generate employment in other categories of the aviation sector - for example, ground staff.

In 2007, out of the 676 000 direct jobs identified by this working document, 250 000 belong to ground staff not affiliated with an air carrier. This figure is clearly underestimated and only includes available and verifiable data. However the information received, particularly as regards independent groundhandling service providers or independent maintenance companies, is incomplete. Available data nevertheless show a positive trend in ground staff employment (see Annexes 10 and 11 relating to specific ground staff categories).

- **Link between employment and passenger traffic**

There is a strong link between traffic and employment levels. Maintaining and increasing employment in the aviation sector appears to be heavily dependent on traffic development within the single market. This traffic development is highlighted by the number of intra-Community routes created (up 110% between 1997 and 2007) and the number of passengers transported (up 40% between 2000 and 2007, representing an overall increase from 367 million passengers to 520 million within Europe). These extra 150 million passengers have made it possible not only to maintain the overall employment levels over the period but also to increase them by another 25 000 jobs.

This upward trend of employment linked to air transport activity appears to have benefited all Member States, even if there are substantial differences from one country to another. The main factor in the geographical distribution of aviation sector employment appears to be traffic departure/ arrival locations. As for any service activity, there is a strong link between where the service is carried out and where employment is created: the air transport worker is located in the same place as the consumer, the passenger. While this is the case for air carriers, it applies even more so for ground staff.

Therefore, over the period studied, there have only been a few changes in the main locations where jobs linked to air transport activity are created. In particular, the companies' choice of

one Member State over another as a base for activities remains primarily determined by the prior existence of a sufficiently important market, which explains the low tendency to relocate within the single aviation market. An analysis carried out before the 2004 enlargement shows that Member States where most of the air carrier employment was located in 1997 (i.e. United Kingdom, Germany, Spain, France and the Netherlands) maintained and even slightly increased their positions over the 1997-2007 period compared to other Member States (see Annex 3).

As regards levels of employment in the new Member States, they follow the same upward trend as that seen in the other Member States: direct employment by airports and air carriers has seen a 3% increase between 2004 and 2007 (see Annex 4). This increase continues the pre-accession trend (up 4% between 1998 and 2007) due to both air carriers and aviation authorities anticipating accession to the single market.

1.2. Analysis by professional category and type of employer

The upward trend of the employment rate in the aviation sector over the period 1997-2007 obscures the fact that there are substantial differences between professional categories.

However, an analysis of the aviation sector by category requires a degree of caution as there is strong interaction between the various professions: when the number of workers decreases in one company, it often rises in another (independent company or outsourced services).

• Flight Crew directly employed by air carriers⁸

In 2007 the total number of flight crew members was estimated to be 51 000 people, which represents a 26% increase compared to 1998. While this increase applies to most of the countries studied (20 out of 28), eight of them, however, recorded a fall.

At the European level, increases in the number of flight crew jobs are in line with the number of licences issued⁹ (see Annex 6). However, within the specific category of flight engineers, the number of licences and workers fell sharply over the period studied. This can be explained by the fact that, as fleets are updated with newer aircraft models, this function is gradually becoming obsolete.

Conversely, a consequence of the development of 'short-haul' fleets in Europe, with an average capacity of 100 to 200 seats per plane, is that flight crew employment tends to increase. The fact that Community air carriers, for instance the 'low-cost' ones, reduce the number of available seats per flight leads to an increase in the number of flight crew although the number of transported passengers remains the same¹⁰. This reasoning also applies to cabin crew.

• Cabin crew directly employed by air carriers¹¹

In 2007 the total number of cabin crew members was estimated at 115 000 people, which means that it had increased by 29% since 1998 (see Annex 7).

⁸ Personnel Navigant Technique.

⁹ The licences are issued in accordance with the JAR-FCL (Joint Aviation Requirements – Flight, Crew, Licensing).

¹⁰ Subject to the rate of aircraft occupancy and the number of flying hours performed by the flight crew remaining constant.

¹¹ Personnel Navigant Commercial.

Unlike pilots, cabin crew are not required to have a licence, which is why a central register is not always available and why their training, in some Member States, is only organised at the level of the air carriers. Moreover, analysis of the replies from 11 Member States highlights the fact that the number of licences issued to cabin crew is below the number of jobs in this category. This lesser regulating of the cabin crew category, compared to the flight crew, has contrasting effects on the cabin crew's mobility within the European Union: it can facilitate access to the labour market but it can also make mutual recognition of professional qualifications more difficult, and therefore adversely affect the freedom of movement of the workers concerned.

- **Maintenance organisations directly depending on an air carrier**

It is estimated that, in 2007, there were around 48 900 maintenance mechanics and engineers, compared to 49 300 in 1998. This employment stagnation, sometimes even fall, applies all over Europe except in Germany, Portugal and Switzerland where figures have substantially risen over the same period (Annex 8).

This downward trend can be explained by a process of rationalisation and synergies with various partners. Takeovers and mergers of carriers also mean that maintenance activities tend to be integrated. Furthermore, generally, European air carriers have a tendency to outsource part of their maintenance to independent companies. With the same line of reasoning, some European groups have gone into joint ventures with extra-European companies, for example Chinese companies, in order to transfer part of the maintenance there, particularly 'heavy' maintenance.

- **Aircraft maintenance organisations independent from an air carrier, airport or groundhandling service provider**

It is difficult to give a comprehensive estimate of the number of workers in independent aircraft maintenance organisations. The replies sent in by seven Member States show a substantial increase in the number of workers and mechanics employed by these independent maintenance organisations (see Annex 9). While it is difficult to determine a figure, this seems to be the general trend in Europe and outsourcing of these posts, particularly by air carriers, means the number of posts in the profession remains the same, or even increases. Germany appears to be the Member State with the highest figure of employment linked to maintenance organisations in Europe with almost 430 maintenance organisations and 30 000 staff (direct employment).

- **Groundhandling service providers**

Groundhandling service providers in Europe are either companies that depend on air carriers or airports, or companies said to be 'independent'. In 2007, the distribution of groundhandling companies per type was: 44% for independent companies; 14% for airports and 42% for airlines¹².

¹² Source: figures from the European Commission, from the study carried out by the Airport Research Center consultant, and available at this address: http://ec.europa.eu/transport/air/studies/air_en.htm#airports). However, the airports' market share appears to be similar to that of independent companies (between 25 to 30% of the groundhandling market).

- **Groundhandling service providers directly employed by air carriers**

Between 1998 and 2006, the number of groundhandling service providers directly employed by air carriers fell by almost 27%, from 88 000 to 64 000 jobs (see Annex 10). However, this does not mean that these jobs were 'lost' but rather that most of them were outsourced to independent groundhandling service providers following the change in the relevant legal framework (Council Directive 96/67/EC¹³).

While employment appears to have remained stable, or even increased in several Member States, (Austria, France, Italy, Portugal, Spain), it has, however, fallen sharply in others (Belgium, Denmark, Germany, Switzerland).

The restructurings and bankruptcies of some air carriers have of course contributed to hastening the transfer to independent providers.

- **Groundhandling service providers independent from air carriers and airports**

It is estimated that in 15 Member States (excluding the 10 new Member States of 2004) the number of workers for independent groundhandling service providers rose from 13 000 in 1996¹⁴ to almost 60 000 in 2007¹⁵. This progression is linked to Council Directive 96/67/EC coming into force.

This estimate is partly in line with the data sent in by 12 Member States, including some 'new' Member States, which also highlight an upward trend in the number of groundhandling providers and in the progression of the number of their workers (see Annex 11).

Therefore, the number of posts in independent groundhandling services appears overall to have substantially increased in Europe over the period studied.

- **Groundhandling service providers directly employed by airports**

There is little available data on this category of groundhandling service providers. It seems, however, that on average, the level of employment has remained the same or fallen slightly. The Airport Research Center study¹⁶ shows that the airport share of the groundhandling service market remained stable, or fell slightly, between 1996 and 2007 (dropping from 26 to 21% in EU15 between 1996 and 2007 and from 46 to 44% for EU12 between 2004 and 2007).

¹³ OJ L 272, 25.10.1996, p. 36-45.

¹⁴ DM Barry & Associate et al., 'Study on the social effects of changes in the civil aviation sector', October 1997.

¹⁵ IAHA (International Aviation Handlers' Association) estimate.

¹⁶ http://ec.europa.eu/transport/air/studies/air_en.htm#airports.

- **Direct employment by airports**

Airports are one of the main generators of employment in the air transport sector in Europe and particularly benefited from the increase in traffic due to the single market: the emergence of the 'low-cost' carrier model led, among other things, to the development of secondary airports.

It should be borne in mind that the analysis in this document focuses on direct employment by airports whereas the number of indirect posts generated by airport activity is probably much higher. The Airports Council International association¹⁷ estimates that the total figure for direct and indirect employment by airports in Europe represents almost 1.2 million people whereas the figure for direct employment is estimated to be 165 000.

Data collected by the European Commission from the Member States enable an estimate of 122 000 direct posts (see Annex 12).

In any event, employment appears to have increased in all the Member States and the outsourcing of certain tasks (groundhandling, maintenance) has been counterbalanced by the increase in traffic and the emergence of new posts (security).

- **Employment of air navigation service providers**

The 'Single Sky' legislation, adopted in 2003, laid down a new general framework for the organisation of air navigation services. One of the crucial factors for workers, linked to the implementation of the 'European Single Sky', is the harmonisation of conditions governing the practice of the air traffic controller profession by establishing a Community licence (Directive 2006/23/EC¹⁸).

However, over the period studied, the new Community legal framework has had a limited impact on employment in this profession, and, particularly, air navigation services are still carried out by public bodies. There has been no transfer or outsourcing (except in the United Kingdom for some terminal services) and technological advances have enabled the increase in traffic to be dealt with without having to increase the number of workers.

These few changes in the profession can be seen in the statistics available which show that employment, between 2001 and 2006, remained the same at around 50 000 jobs. More specifically, the number of air traffic controllers has risen slightly to almost 16 000 jobs in 2006 while the number of air navigation engineers and technicians (ATSEP¹⁹) has fallen somewhat, to around 11 000 jobs in 2006 (see Annex 13).

However, the upcoming implementation of functional blocks of airspace, and the SESAR programme, could mean more substantial changes for the employment structure in the sector: the transnational and Community aspect of employment should be consolidated and technological advances will lead to changes in some of the required skills.

¹⁷ Economic Survey, 2008.

¹⁸ OJ L 114, 27.4.2006, p. 22-37.

¹⁹ ATSEP is the acronym for Air Traffic Safety Engineering Professional.

2. SIGNIFICANT TRANSFORMATION OF AVIATION SECTOR EMPLOYMENT

One of the driving forces behind the single aviation market was the development of competition for routes not only from one Member State to another but also within Member States. This competition led to an increase in the number of players, in the competition for many routes and to a sharp drop in fares.

This, in turn, led to the development of new economic models which require increased cost control and an in-depth change in the employment structure. These changes have had three main consequences:

- increase in work productivity and employment flexibility as a result of tougher competition;
- development of transnational employment;
- new challenges for social partners and industrial relations.

2.1. Tougher competition leading to increased work productivity and flexibility

The drive for work productivity by air carriers was made very obvious by the arrival of new rivals on routes which, until then, had been strictly regulated by the state, which would set flight quotas for each destination and controlled passenger fares.

The liberalisation of fares and the end of monopolies or duopolies on Community routes, as shown by the arrival of 'low-cost' carriers, have meant that all Community carriers have had to adapt in order to become more competitive and have had to deal with tougher competition. The drive to optimise costs and rationalise the companies' operations led to a change in the employment structure. As a result, substantial restructuring and outsourcing processes over the period 1997-2007 had an impact on all air transport professions.

The most visible consequence for aviation sector workers was the increase in work productivity. Carriers often explain that this increase in work productivity is imperative as staff costs amount to nearly 30% of their total costs, while workers' associations usually claim that carriers focus too much on the work factor to reduce costs.

In any case, it is possible to get concrete examples of the increase in air carriers' productivity from the data collected from the aviation authorities: the average number of workers needed by an air carrier to cater for 1 000 passengers fell by 36% between 1998 and 2007 (see Annex 14). These figures not only show the increase in work productivity but also the carriers' outsourcing trend.

This work productivity also means that greater flexibility is sought, as can be seen from the increase in temporary contracts in the aviation sector, workers on temporary contracts represented almost 20% of the total number of employees in 2006, nearly double the 1997 figure. The increase of the variable remuneration component, which is often above practice in other sectors²⁰, is a further example of this trend.

²⁰ Source: Ecorys study.

This increase in work productivity and flexibility in air transport appears to be a consequence of the implementation of the single market but it is also one of the keys to sustaining the sector's competitiveness and therefore to maintaining employment levels. The 'low cost' carrier model particularly is based on increased flexibility and work productivity which allows intensive use of the fleet (with planes flying more than 12 hours a day), with the highest pilot to plane employment ratio of the sector.

There is a tendency for other Community air carriers to apply elements of this economic model, as illustrated by the fact that legacy carriers are setting up 'low-cost' subsidiaries or outsourcing some services. This model, based on increased operational pressure on workers, affects employees' working conditions, with the development of temporary contracts, of part time work or of longer working hours²¹. However, all Community air carriers must abide by the social and safety standards as laid down in national and European legislation, which guarantees a minimal number of rights.

If work productivity is to be considered a factor for maintaining, even possibly for increasing, employment, it is necessary to highlight the crucial role of traffic on employment levels. However, it seems that the number of passengers transported is increasing faster than the number of jobs created precisely as a result of work productivity (Annex 15): consequently, maintaining and increasing employment require a significant increase in traffic. Conversely, a fall in traffic inevitably has a negative effect on the employment level.

2.2. Development of transnational employment

The development of transnational employment is one of the direct consequences of the implementation of the single aviation market in the sense that the free movement of capital within the single market led the aviation sector to follow a development strategy already used in other sectors, the objective of which is to establish groups no longer only at the national level but also at Community level. Both the freedom of establishment and the freedom to provide services have allowed Community carriers to create air bases in whichever Member State they choose and from which they can operate air services to any location within the Community. This is particularly the case for Community air carriers with multi-base companies or during merger/acquisition processes, but also applies to the groundhandling service sector, which, more and more, is being organised globally. The development of these transnational companies, which are based in several Member States with staff of different nationalities, means that air transport is facing the same problems that exist in other similar transnational service activities. In particular, the question of which social standards should apply to transnational companies' employees and the risk of competition distortion due to differences in social standards among Member States are regularly brought up.

Aviation companies tend to create synergies in all areas, such as pooling staff, due to global alliances or merger/acquisition processes: this could, in the future, be supported by a common human resources policy linked to the development of transnational employment.

²¹ While we do not have reliable data on work quality in the aviation sector specifically, Eurofound, in a transversal study, conclusively found a link between atypical forms of work and health and safety issues for the workers concerned. Source: 'Quality of work and employment in Europe – Issues and challenges, European Foundation for the Improvement of Living and Working Conditions', Foundation paper, N°1 February 2002, p. 9-10.

2.3. Challenges caused by this transformation for social partners and industrial relations

Alongside concentration, the single aviation market has also lessened the containment of the aviation sector within a national boundary. This has led to a more diverse and wider range of employer categories, due, for instance, to the outsourcing processes which caused employment to be redistributed from one employer to another. Before the implementation of the single aviation market, air carriers would usually not only handle the air service per se but also the groundhandling service or the maintenance. This type of air transport self-containment has not completely disappeared but it has evolved with the arrival of new players and therefore of new employers.

The example of groundhandling is significant in the sense that the European Community adopted Council Directive 96/67/EC, which opened up the groundhandling market in Community airports whose annual traffic is not less than two million passenger movements or 50 000 tonnes of freight. If the 'legacy' providers, particularly airports and air carriers that self-handled, seem to have kept their dominant position in the sector, the arrival of new independent providers has led to a diversification of players, sometimes even to the eviction of these 'legacy' providers.

Transformation in the sector has created many challenges for workers' representatives. In the case of 'legacy' air carriers, the trade unions focused on negotiating²² decent working conditions for their members, in particular when a company was restructuring. However, several carriers have changed the recruitment conditions of new employees, for example, by giving them a temporary contract or by using a variable remuneration scheme. As regards 'low-cost' carriers, it has sometimes been difficult for the unions to attract new members and to be recognised as negotiation partners, in part, in their opinion, due to resistance from some employers.

In any case, the outsourcing of activities which used to be contained within one body, as well as moving on from a strictly national logic, as required by the single market, have led workers' associations to rethink their structure in order to follow the way their employers' commercial models have evolved. Carrying out negotiations on a purely national basis becomes a problem when both the employer and employment are transnational. Trade unions have therefore responded to the merger / acquisition processes and global alliances by creating their own alliances in the relevant air carriers. One of the consequences of this concentration has been the increased distance between where global companies take decisions and where employees and their representatives are based. Such fragmentation and concentration have become challenges which employers must also face.

Furthermore, the outsourcing resulting from the single market is indirectly contributing to breaking down the link between the outsourced activity and the aviation sector: it therefore remains to be determined whether or not the companies and the workers in the outsourced service (for example in groundhandling catering services) continue to be part of the civil aviation industrial relations system, and which are the workers' and employers' associations which represent them.

²² In terms of collective bargaining, the sector is characterised by the fact that corporate agreements are predominantly used. In many countries, there is no employers' association specific to the sector, see Comparative Study on Industrial relations in the airline sector (EIRO, 2005), <http://www.eurofound.europa.eu/eiro/2005/08/study/tn0508101s.htm>.

These restructurings and in-depth transformation explain why there were many labour disputes in the air transport sector during the implementation of the single market. As this transformation will continue in the medium term, representatives for both employers and employees will have to strive to maintain and develop social dialogue in order to anticipate and manage future changes.

3. IMPORTANCE OF SOCIAL STANDARDS APPLICABLE TO THE AVIATION SECTOR

The key factor in creating the single aviation market is the implementation of a harmonised regulatory framework in all Member States. Such harmonisation is crucial to guarantee optimum performance of the market and to avoid competition distortion due to different legal standards being applied.

The specificity of the air transport sector was dealt with by the following:

- the general Community social standards, common to all economic activities, which lay down a core of minimum requirements, to support and complement Member States' measures
- the implementation of legislation specific to air transport²³, gradually harmonised at Community level, which has a social dimension.

These standards create a framework for the transnational aspect of employment, which is becoming increasingly important in the aviation sector.

3.1. General Community social standards: a common base for the European Union

European air transport is governed by the European Union's general rules, including social legislation. The objective of these horizontal European rules is to consolidate or harmonise the national standards in Member States, to improve working conditions and to guarantee the free movement of workers and the functioning of the single market.

European legislation has thus since 1971²⁴ been coordinating the Member States' social security schemes in order to guarantee equality of treatment regardless of nationality and to protect the workers' acquired rights in a cross-border context. This legislation provides them with social security by determining which legislation should be applied and by avoiding gaps in protection or double payment of contributions.

European legislation, through Council Directive 89/391/EEC²⁵, also lays down the guiding principles and the minimum standards regarding health and safety of workers at work.

The information and consultation rights of employees in their companies is provided for by Directive 2002/14/EC²⁶ establishing a general framework for informing and consulting employees in the European Community.

²³ Particularly, the standards relating to the issue of operating licences, to air safety or even to air navigation.

²⁴ Regulations (EEC) No 1408/71 and (EEC) No 574/72 repealed by Regulations (EC) No 883/2004 and (EC) No 987/2009 as from May 2010.

²⁵ OJ L 183, 29.6.1989, p. 1-8.

²⁶ OJ L 80, 23.3.2002, p. 29-34.

Community provisions on labour legislation also cover working conditions for temporary agency workers, part-time workers, workers on a temporary contract or on posting. It protects the workers in the event of collective redundancies or of an employer's insolvency. Finally, Directive 2001/23/EC²⁷ can also be mentioned as it lays down that the transfer of the undertaking, business or part of the undertaking or business shall not in itself constitute grounds for dismissal. On the contrary, in the event of a transfer such as defined in the Directive, the rights and obligations arising from the contract or the employment relationship are transferred from the former to the new employer²⁸.

The Member States' aviation authorities highlight the importance of this general Community framework, which constitutes a minimum core applicable to air transport, but most of them stress that these are a bare minimum which must be complemented at national level²⁹.

3.2. The social dimension of the European standards specific to air transport

Beyond this general Community framework, the single aviation market logic has helped develop standards specific to air transport, which include a social dimension. The European Community intended to optimise the functioning of the single market by gradually standardising the conditions governing the practice of aviation sector jobs, as can be seen from Directive 2006/23/EC, which established a Community air traffic controller licence.

The issue of working hours for flying personnel is also important in view of air safety objectives but also of health and safety at work for employees. The mobile staff in civil aviation³⁰ are covered by the minimum standards of Directive 2000/79/EC³¹, which lays down a maximum annual working time of 2 000 hours, in which the block flying time shall be limited to 900 hours, to be spread as evenly as practicable throughout the year, a number of days free of all duty (7 days in each calendar month and at least 96 days in each calendar year), as well as paid annual leave of at least four weeks. It should be noted that this Directive implements the European Agreement on the organisation of working time of mobile workers in civil aviation concluded by the European sectoral social partners in 2000, the latter having made use of the mechanism to implement a social agreement by way of Union legislation, in accordance with Article 155(2) of the Treaty on the Functioning of the European Union (ex Article 139 TEC).

Another important document for flying personnel's flying time is Regulation (EC) No 1899/2006³² (particularly Subpart Q) which guarantees that harmonised minimum standards will be applied as regards flight and duty time limitations and rest. This Regulation

²⁷ OJ L 82, 22.3.2001, p. 16-20.

²⁸ The matter of safeguarding the employment relationship and acquired rights arises for example when the groundhandling service provider changes, according to the modalities under which the change is made.

²⁹ Article 153 of the Treaty on the Functioning of the European Union (ex Article 137 TEC) lays down that the Union shall support and complement the activities of the Member States by adopting minimum requirements in several areas of social policy; the Member States being free to maintain or introduce more stringent protective measures compatible with the Treaty.

³⁰ Non mobile workers in the aviation sector are covered by Directive 2003/88/EC of the European Parliament and of the Council of 4 November 2003 concerning certain aspects of the organisation of working time.

³¹ OJ L 302, 1.12.2000, p. 57-60.

³² OJ L 377, 27.12.2006, p. 1.

also lays down that each air carrier must nominate a home base³³ for each crew member, which could help better determine the standards applicable to air carriers' transnational activity. This document also sets out the conditions of issue of an attestation to cabin crew. It should be noted that these provisions should all be included in the implementing rules of Regulation (EC) No 216/2008³⁴, which will harmonise the conditions of issue of pilot licences and medical certificates. Directive 91/670/EC³⁵, which already provided for the mutual acceptance of pilot licences issued in Member States, will thus be repealed when the implementing rules of Regulation (EC) No 216/2008 are adopted.

This regulatory corpus thus has a social dimension and provides the basic elements to supervise the transnational activity of aviation sector companies.

3.3. Managing the transnational activity of aviation sector companies

Employment and work conditions for air transport workers continue to be mostly determined at national level: this is the case for such essential standards as those relating to leave, pension fund contributions, minimum wage (when it exists), workers' representation or even to rights in the event of dismissal. To ensure a fair and optimum functioning of the single market however requires some form of supervision of the applicable social standards in the aviation sector, for instance, as regards flying personnel, for which the nature of the contracts and applicable social legislation varies from one Member State to another.

Community-level solutions address matters mainly by way of legislation or social dialogue.

As already mentioned, a minimum harmonisation is carried out by documents specific to air transport, to safeguard safety standards requirements, but mostly by rules transversal to all sectors, whose objective is to enable a worker in one Member State but originating from another country, to benefit from social rights similar to those of workers in that Member State. Some of these documents specifically cover mobile staff in transnational activity in Europe with the dual objective of guaranteeing the application of minimum social standards for all workers but also of promoting a fair competitive environment for the companies.

Directive 96/71/EC³⁶ on posting guarantees in particular that the employee temporarily posted in a Member State other than that where he usually works should be provided a 'hard core' of clearly defined minimum conditions governing work and employment – either through legal, regulatory or administrative provisions, or through collective agreements or arbitration awards which have been declared universally applicable to the sector concerned – which must be observed in the host Member State (Article 3 of the Directive). The objective of such provisions is to maintain the balance between free movement of services, one of the fundamental freedoms and pillars of European construction, on one hand, and adequate protection of the rights of workers temporarily posted abroad to provide these services, on the other. They also protect against abuse of differences in social standards. The Directive on the

³³ This home base is defined in Regulation (EC) No 1899/2006 as: 'The location nominated by the operator to the crew member from where the crew member normally starts and ends a duty period or a series of duty periods and where, under normal conditions, the operator is not responsible for the accommodation of the crew member concerned.'

³⁴ OJ L 79, 19.3.2008, p. 1-49.

³⁵ OJ L 373, 31.12.1991, p. 1.

³⁶ Directive 96/71/EC of the European Parliament and of the Council concerning the posting of workers in the framework of the provision of services. OJ L 18, 21.1.1997, p. 1-6.

posting of workers is only one of the measures aimed at preserving the above-mentioned balance. The case law of the Court of Justice has shown in several recent cases³⁷ that implementing this Directive was difficult for the players concerned. To address this, the Commission has taken a series of initiatives to improve the implementation of the Directive on posting and is looking at the different options available. Problems encountered often stem from difficulties in determining which law is applicable to the transnational activities: for it to be determined in a specific situation, European law must weigh up the right to transnational mobility and other public interests, such as workers' protection. In terms of mobile workers' protection, the case law of the Court of Justice may also be relied on as regards the right to industrial action, such as strikes, recognised by the Court of Justice as belonging to the general principles of Community law³⁸.

Likewise, Regulation (EC) No 593/2008 on the law applicable to contractual obligations³⁹ is just as important for the protection it affords the weaker party. The employee cannot be deprived of the mandatory provisions afforded to him/her by the Member State where or from where he/she habitually performs his/her activity (Article 8). As a result, the law for the employment contract chosen by the parties cannot cause the worker to be deprived of the protection granted to him/her by mandatory provisions of the law which would be applicable by default. This law applicable in the absence of choice – unless the circumstances as a whole show that the contract is more closely connected with another country, in which case this other country's law is applicable – is the one of the country in which or from which he/she habitually performs his/her work, or, if the worker does not habitually perform his/her work in or from only one country, of the country where the place of business through which the employee was engaged is situated (Article 8). This integration into Community legislation of the previously applicable Convention⁴⁰ provides further guarantees to employees, in particular in the aviation sector, regardless of the law of the country in which they were engaged. In the specific case of flying personnel, these new provisions should consolidate the link between the place of engagement and applicable standards. It can, however, be difficult to determine precisely for the flying personnel the place where the service is performed, which must be analysed on a case by case basis in view of all the elements in each case.

Another way to address the issue of transnational employment is to promote and develop European or transnational social dialogue at company or sector level, for example with European Works Councils, transnational company agreements or European sectoral agreements.

As regards the aviation sector specifically, several carriers and their employees have, under the provisions of Council Directive 94/45/EC⁴¹, set up European Works Councils which bring together all the representatives of the group's workers in the various Member States. These councils mean that workers can stay informed and be consulted by the management, at transnational level, on business matters and any other significant decision likely to affect them. With these European Works Councils, exchange of information is made easier and consultation can be structured at European level, however, they have not yet become the norm

³⁷ Viking line C-438/05, Laval C-341/05, Commission v Luxembourg C-319/06, Rüffert C-346/06.

³⁸ Viking line C-438/05, Laval C-341/05.

³⁹ Regulation (EC) No 593/2008 (OJ L 117, 4.7.2008) entered into force on 17 December 2009 and applies to all employment contracts concluded after this date.

⁴⁰ Rome Convention on the law applicable to contractual obligations, 19 June 1980.

⁴¹ OJ L 254, 30.9.1994, p. 64. The provisions of this Directive will be repealed by Directive 2009/38/EC from June 2011.

in the aviation sector. Directive 2009/38/EC⁴², which will come into force in June 2011, should further help the set-up of new councils and enhance their role.

Some carriers with a transnational dimension have also negotiated and concluded company agreements, the scope of which extends to several States and which deal with employer – employee (or their representatives) relations and/or work and employment conditions (see Annex 16). Trade unions and European Works Councils have, as such, begun to extend beyond their national boundary or their consultative role to get involved in transnational industrial negotiation. One of the objectives of these initiatives is for flight crew members based in several Member States to be represented in order to create joint social dialogue with the company's management. This evolution, which can also be seen in other sectors, is very much hoped for by some European associations. The unions' objectives are to negotiate more specific provisions on, for example, career development in the company, transfers between air bases or rights in the event of dismissal. Development of such company agreements is hampered by the refusal of some employers to go down this route and the determination of the negotiation's players, by the absence of any European framework for transnational industrial negotiation and by the necessary compliance of the concluded agreements with the national law of each of the Member States to which the carriers are subject. The European Union has supported the development of transnational company agreements by different means since 2005⁴³.

Agreements between social partners could also develop at the aviation sector level. How efficient such social dialogue can be depends, however, on the representativeness of the parties and the negotiation mandate given to them by their members (see Annex 17). As mentioned above, a precedent exists in the European Agreement on the Organisation of Working Time of Mobile Workers in Civil Aviation, concluded on 22 March 2000 by employers' and employees' associations in the civil aviation sector and implemented by Directive 2000/79/EC. Article 155 of the Treaty on the Functioning of the European Union provides a framework for such negotiations between social partners. It lays down that should management and labour so desire, the dialogue between them at European Union level may lead to contractual relations, including agreements. Agreements concluded at European Union level shall be implemented either in accordance with the procedures and practices specific to management and labour and the Member States, or by European Union legislation⁴⁴.

Since the end of the 1990s, the European Commission has promoted social dialogue between European social partners who meet regularly as part of the 'Civil Aviation' Sectoral Social

⁴² Directive 2009/38/EC of the European Parliament and of the Council of 6 May 2009 on the establishment of a European Works Council or a procedure in Community-scale undertakings and Community-scale groups of undertakings for the purposes of informing and consulting employees, OJ L 112, 16.5.2009, p. 28.

⁴³ See for instance: 'The role of transnational company agreements in the context of increasing international integration' SEC(2008)2155 and other measures on the Commission's website at this address: <http://ec.europa.eu/social/main.jsp?catId=707&langId=en&intPageId=214>.

⁴⁴ This second possibility to implement a European agreement is restricted to matters falling under the scope of Article 153 TFEU, i.e. fields in which the Union is competent to support and complement the activities of the Member States. These are exclusively social provisions (protection of workers' health and safety, working conditions, protection of workers where their employment contract is terminated, the information and consultation of workers, equality between men and women with regard to labour market opportunities and treatment at work, etc.)

Dialogue Committee. There the social partners are able, on a voluntary basis, to reflect on the provisions to be covered in such negotiations⁴⁵.

As well as establishing social standards by way of legislation or agreement, transnational social dialogue in companies also means that: companies acquire a social dimension at European level; workers are able to participate in determining the conditions in which they work; the evolution of employment transnationally can be anticipated; and accompanying measures for restructurings and human resources management in transnational groups can be launched. The development of transnational or European-level dialogue and negotiations between social partners, in companies as much as in the sector, is one of the Commission's preferred ways of accompanying the development of transnational activities in aviation sector companies.

Furthermore, how the European aviation sector responds to transnational employment seems all the more important as it will soon reach beyond Europe. The conclusion of Air Transport Agreements by the European Union with partners such as the United States or Canada or the development of international commercial alliances between carriers will certainly help sustain the dynamics triggered by the single aviation market: closer transatlantic collaboration between carriers or the development of air bases by European carriers outside the European Union is a possibility and solutions found at the European level will guide those that will need to be found at international level.

CONCLUSION

The single aviation market has allowed access to air transport to a greater number of European citizens by helping to create new routes and to reduce fares. Beyond these new possibilities, this document also highlights an increase in the level of direct employment in the aviation sector over the period 1997-2007, directly linked to traffic growth. With this increase also came a significant sector transformation marked by a rise in work productivity and the development of transnational employment.

However, the transformation cannot only be assessed in terms of increase of employment levels. It should therefore be noted, that over the period studied, aviation sector employment has also undergone substantial changes due to the development of new players, such as low-cost carriers or the outsourcing of services previously contained within carriers and airports, such as groundhandling or maintenance. These developments are the result of increased competition on the single market, the dynamics of which led to a sharp rise in work productivity, which in turn helped sustain employment levels. However, it will be necessary to carry out a more in-depth analysis of the quality of the jobs created or maintained.

The transformations identified in this document create challenges for the social partners, who no longer act within a group contained at a national level but must adapt their content and the framework of their industrial relations to a fragmented and transnational environment. The European Union's social standards create a framework for the transnational dimension of employment, and some of the documents specifically cover mobile staff performing

⁴⁵ The Civil Aviation Sectoral Social Dialogue Committee was set up in 2000 in accordance with Commission Decision of 20 May 1998 on the establishment of Sectoral Dialogue Committees promoting the Dialogue between the social partners at European level (Decision 98/500/EC – OJ L 225, 12.8.1998, p. 27-28).

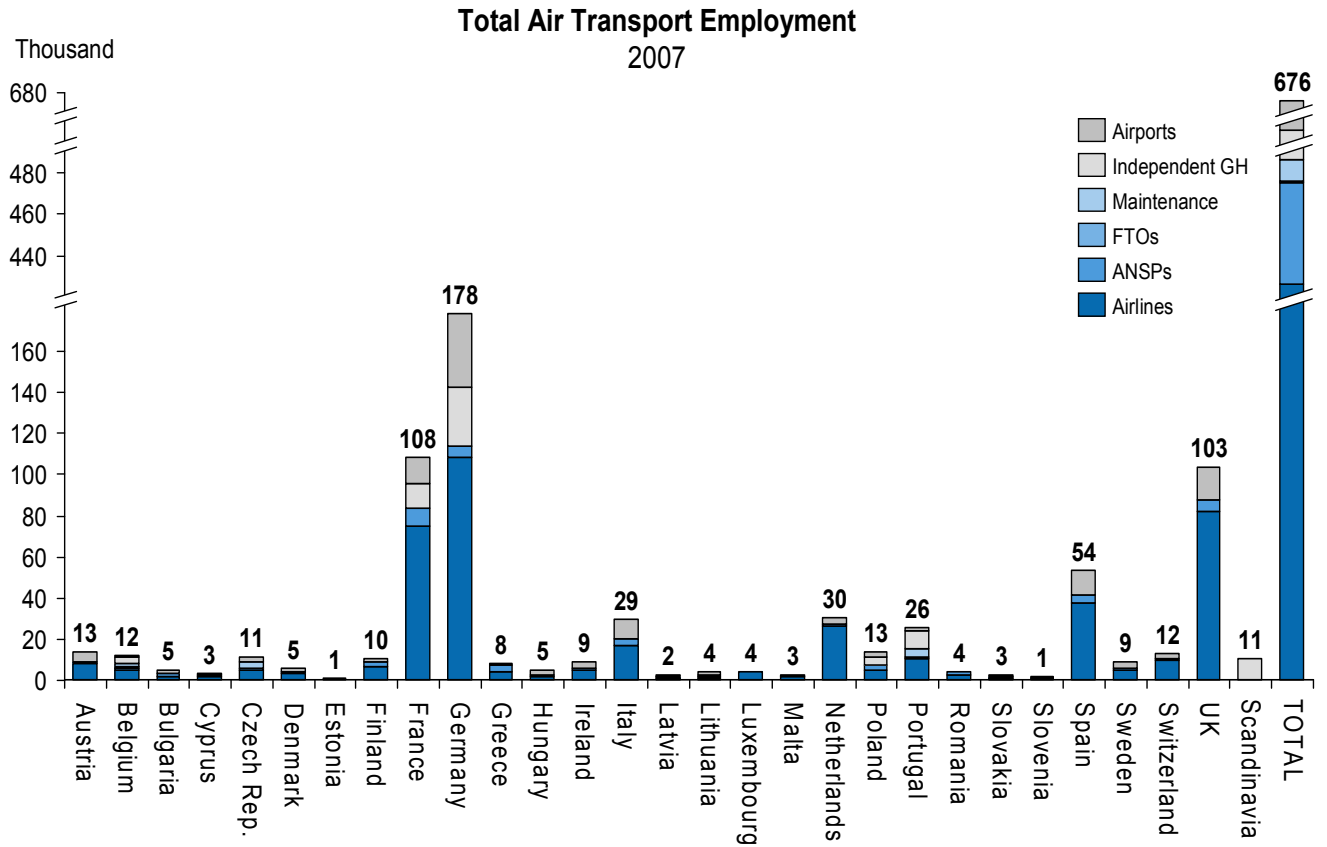
transnational activities in Europe. Another strategy developed to address the issue of transnational employment is the promotion and development of European or transnational social dialogue at the level of companies or of the whole sector.

In the upcoming years, the European Union will face the challenge of having to consolidate the levels and quality of employment, and this against a background of economic and financial crisis and of increased focus on environmental issues. It seems important that statistical instruments are available to the European Union, which will allow the evolution of employment in level and quality to be measured and assessed: studies carried out by European Commission services have allowed the first European database to be created, which must be perpetuated and updated, for instance for professions where data are incomplete and ensure that developments in working conditions are monitored. An investment from each Member State, probably in collaboration with European Commission services, would allow such a statistical tool to be developed, which constitutes a crucial element in the decision-making process and for potential evolution of the legislation in force. The fragmented information available regarding the fall in employment due to the crisis, makes it all the more necessary.

If the convergence process, even the regulatory harmonisation, already appears advanced within the single aviation market, it will probably need to be sustained to better address, for instance, the transnational activity of carriers and their employees. In this sense, reflexion on the means of promoting transnational agreement negotiations, within companies, or possible agreements between European social partners across the whole sector should be taken further. The importance of this reflexion is all the more obvious as it transcends the single market and will have repercussions on the European Union's advanced relations with extra-European partners, such as the United States or Canada, relations in which strong links between carriers already exist.

ANNEXES

Annex 1: Total direct employment in air transport in 2007



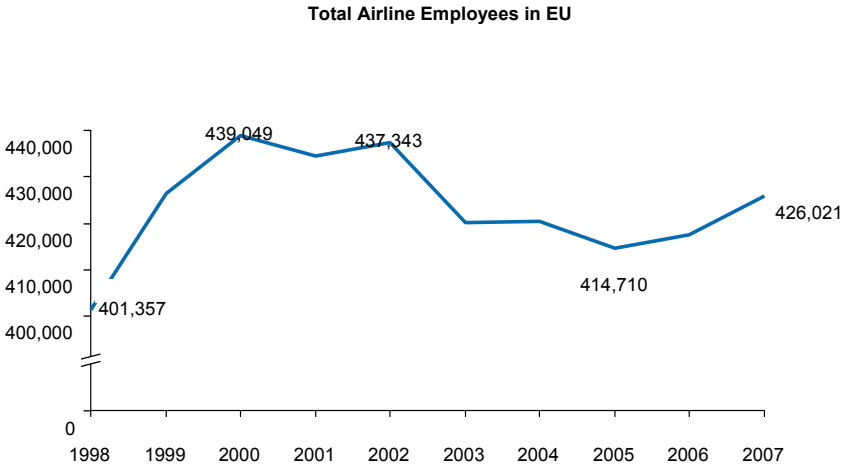
Sources: Questionnaire responses, IATA ; UK CAA statistics; Air Transport Intelligence, Airport Annual Reports

Legend:

- (1) Independent GH : Independent Ground handlers
- (2) Maintenance: Independent Maintenance Organisations
- (3) FTO: Flight Training Organisations
- (4) ANSP: Air navigation Service providers

Source: Booz&Co: Employment Study 2009

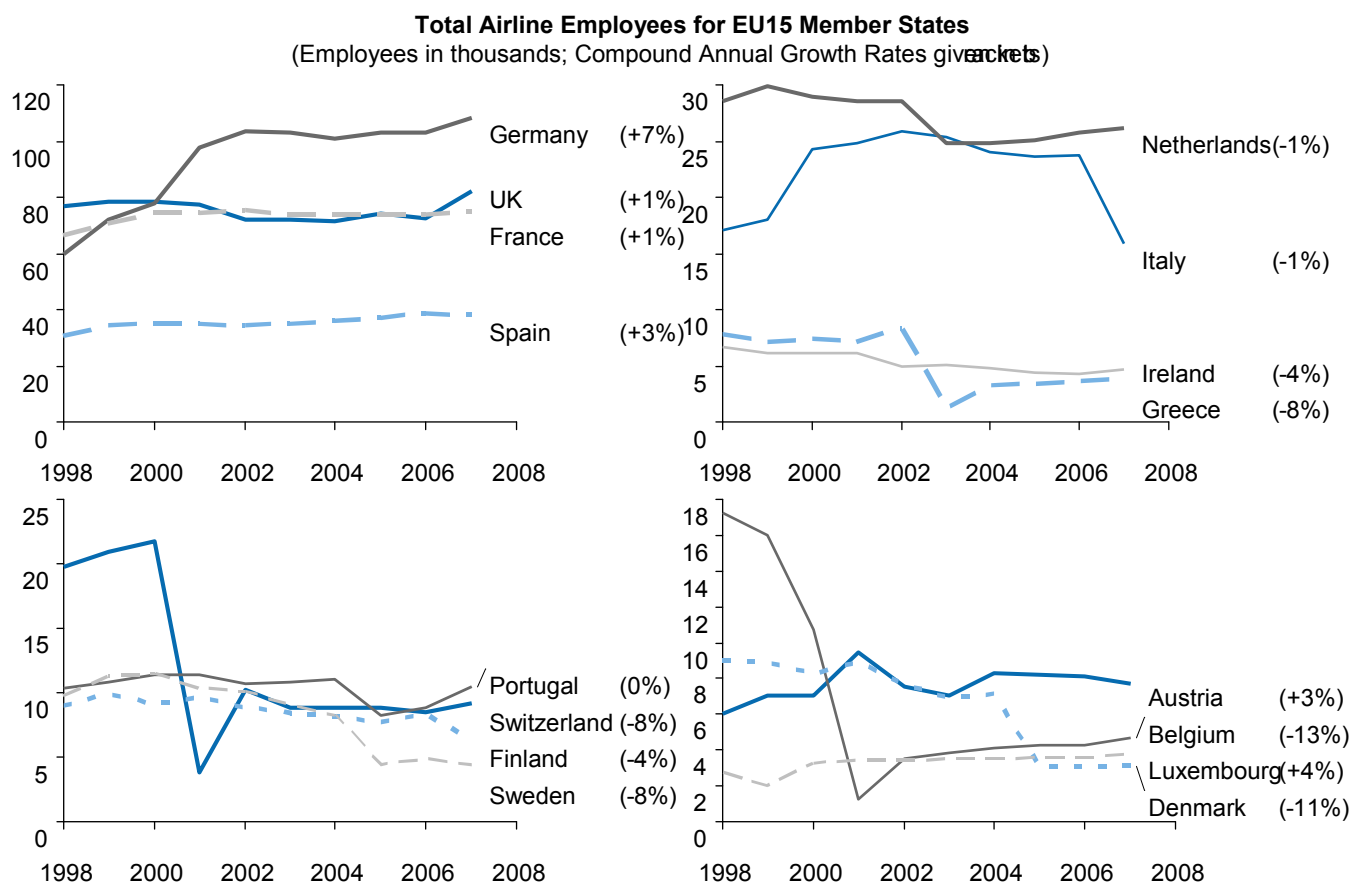
Annex 2: Evolution of employment by air carriers in EU27 and Switzerland



Source: Booz&Co: Employment Study 2009

Questionnaires to Member States and Industry information

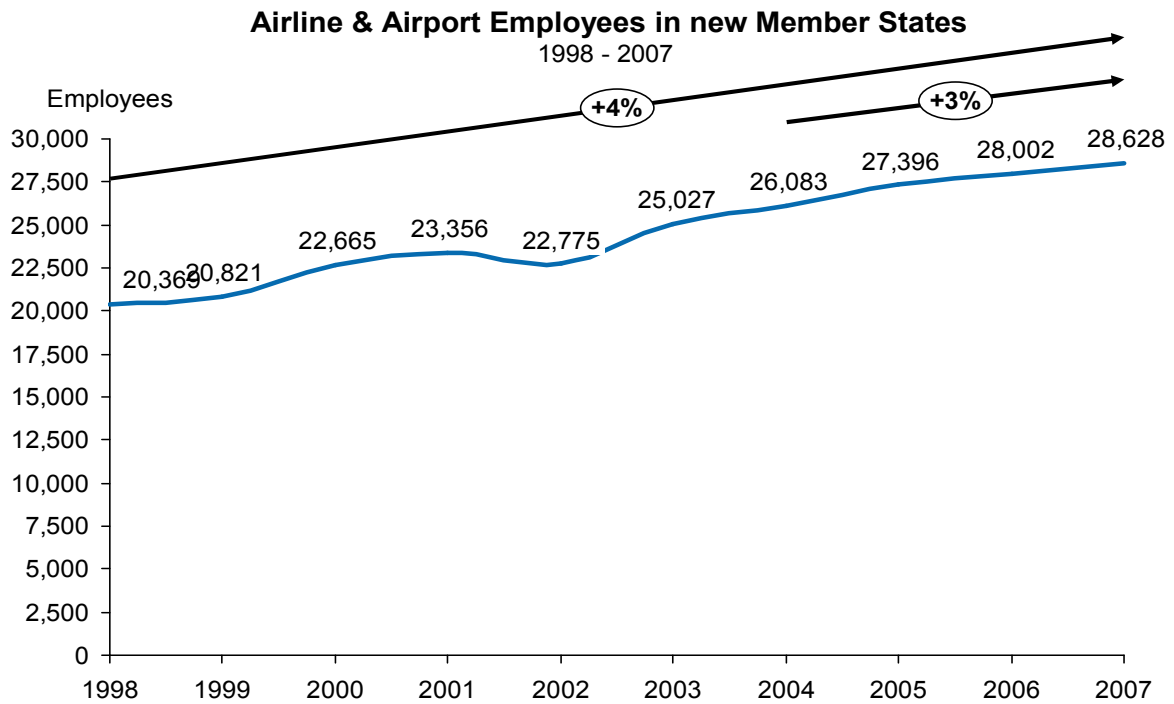
Annex 3: Comparison of how employment by air carriers has developed in EU15



Sources: Questionnaire responses (question 1B.1a); Booz & Co. analysis IATA, Air Transport Intelligence Annual Reports

Source: Booz&Co: Employment Study 2009. Questionnaires to Member States and Industry information.

Annex 4: Evolution of employment by carriers and airports in the new Member States (EU12)



Source: Booz&Co: Employment Study 2009. Questionnaires to Member States and Industry information

Annex 5: Flight Crew Employment

Flight Crew Employed

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Austria	631	748	765	1 296	1 048	1 006	1 150	1 180	1 141	1 049
Belgium	805	861	962	398	780	691	871	705	717	859
Bulgaria	654	625	584	621	447	489	496	526	552	343
Cyprus	140	140	167	171	192	196	218	204	199	200
Czech Rep.	1 040	1 105	1 115	1 120	1 130	1 060	1 133	1 165	1 310	1 370
Denmark	937	930	842	952	871	694	775	710	729	748
Estonia	53	56	55	46	44	45	51	54	63	64
Finland	594	720	651	753	771	790	785	670	826	860
France	7 088	7 499	7 692	8 002	7 916	7 828	7 719	7 517	7 558	7 820
Germany	5 120	5 285	5 676	6 251	6 372	6 570	6 829	7 355	7 153	8 204
Greece	552	553	530	481	476	533	692	663	685	724
Hungary	284	278	264	237	221	220	261	273	276	272
Ireland	488	561	550	645	628	682	666	694	638	744
Italy	1 439	1 433	2 833	3 083	3 362	3 182	2 831	2 956	3 032	2 189
Latvia	54	46	38	41	46	56	87	135	158	183
Lithuania	630	643	499	480	474	465	463	476	483	492
Luxembourg	310	125	403	458	482	488	477	500	508	538
Malta	125	128	153	141	134	145	148	140	131	139
Netherlands	2 067	2 162	2 117	2 172	2 187	1 804	1 819	1 828	1 886	1 912
Poland	626	669	754	846	811	847	824	789	862	910
Portugal	594	626	663	663	884	951	967	1 411	1 649	1 994
Romania	328	297	264	225	224	219	157	161	168	202
Slovakia	21	28	30	29	32	63	113	114	134	185
Slovenia	96	91	89	91	86	90	105	106	118	132
Spain	2 322	2 976	3 214	3 362	3 289	3 336	3 443	3 486	3 521	3 746
Sweden	926	992	1 033	995	1 028	886	959	683	719	721
Switzerland	3 355	3 648	3 936	1 826	3 382	2 553	2 227	2 786	2 761	2 803
UK	9 008	9 700	9 776	10 257	10 129	9 880	9 900	10 140	10 828	11 407
	40 286	42 926	45 656	45 643	47 447	45 771	46 166	47 427	48 805	50 809

Source: Booz&co: Employment Study 2009. Questionnaires to Member States and Industry information

Annex 6: Pilot licences issued by the Member States (ATPL and CPL)

Air Transport Pilot Licences Issued (ATPL)

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Belgium	-	-	-	524	648	609	635	648	724	983
Bulgaria	-	-	-	-	-	-	263	352	393	430
Cyprus	0	0	0	0	0	0	0	0	0	0
Czech Republic	316	401	403	421	465	482	501	520	545	571
Finland	-	546	585	631	661	702	737	738	773	803
France	4 824	4 660	3 954	5 664	6 764	7 154	7 338	6 374	6 463	6 932
Germany	8 857	9 390	10 255	10 817	11 477	8 108	8 919	9 353	9 330	9 464
Hungary	382	267	289	423	456	448	473	475	485	468
Lithuania	117	130	144	140	137	143	151	158	162	164
Malta	103	104	92	107	65	120	125	139	145	142
Poland	512	512	686	550	589	631	733	749	795	852
Portugal	610	715	794	856	920	996	1 092	1 159	1 203	1 280
Slovakia	68	68	70	69	66	66	77	85	86	113
Spain	130	246	271	249	282	141	248	251	273	355
Sweden	1 340	1 428	1 563	1 681	1 705	1 776	1 836	1 916	1 917	1 962
Switzerland	1 837	2 036	2 223	2 160	2 185	2 094	2 104	2 086	2 055	2 101
UK	11 090	11 946	-	-	-	13 591	13 008	-	-	13 583
<i>Index (1998=100)</i>	<i>100</i>	<i>106</i>	<i>111</i>	<i>119</i>	<i>125</i>	<i>118</i>	<i>121</i>	<i>121</i>	<i>122</i>	<i>126</i>

Source: Booz&co: Employment Study 2009. Questionnaires to Member States and Industry information

Note: It should be noted that Cyprus does not grant nor offer Commercial and Air Transport Pilot licences.

Commercial Pilot Licences Issued (CPL)

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Belgium	-	-	-	548	811	1 002	1 392	1 396	1 499	1 717
Bulgaria	-	-	-	-	-	-	200	245	333	420
Cyprus	0	0	0	0	0	0	0	0	0	0
Czech Republic	633	609	620	606	611	521	580	591	717	752
Finland	0	720	769	858	945	1 033	1 112	1 029	1 055	1 050
France	7 799	6 856	5 216	6 382	6 114	6 525	6 836	6 167	6 393	6 007
Germany	785	4 001	2 943	2 897	2 852	5 900	5 463	4 953	5 945	5 064
Hungary	367	385	328	376	397	387	398	371	375	351
Lithuania	243	245	226	217	210	215	223	227	230	231
Malta	48	76	76	69	54	58	59	59	61	64
Poland	2 186	1 940	1 342	976	980	971	1 063	1 084	1 121	1 099
Portugal	778	753	778	813	820	851	858	914	997	1 100
Slovakia	260	250	242	198	187	203	222	237	195	183
Spain	394	401	365	673	886	786	601	601	529	663
Sweden	1 962	2 091	2 146	2 307	2 359	2 275	2 317	2 293	2 025	2 004
Switzerland	1 318	1 384	1 421	1 396	1 399	1 190	1 236	1 000	900	959
UK	3 184	3 496	-	-	-	4 021	4 173	-	-	5 333
<i>Index (1998=100)</i>	<i>100</i>	<i>113</i>	<i>98</i>	<i>104</i>	<i>103</i>	<i>120</i>	<i>120</i>	<i>117</i>	<i>121</i>	<i>119</i>

Source: Booz&co: Employment Study 2009. Questionnaires to Member States and Industry information

Note: Cyprus does not grant nor offer Commercial and Air Transport Pilot licences.

Annex 7: Employment of Cabin Crew

Employed Mobile Workers – Cabin Crew

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Austria	1 497	2 065	1 835	2 633	2 031	1 800	2 365	2 229	2 213	1 945
Belgium	1 703	1 527	1 668	21	554	718	761	743	734	883
Bulgaria	559	537	467	490	219	313	350	454	418	437
Cyprus	391	403	414	478	462	500	570	501	453	439
Czech Rep.	1 027	1 059	1 151	1 379	1 230	1 319	1 582	1 711	1 951	2 020
Denmark	1 543	1 660	1 495	1 693	1 472	1 252	1 432	1 080	1 059	1 137
Estonia	59	67	61	57	61	67	83	94	101	102
Finland	1 700	1 812	1 645	1 725	1 718	1 671	1 697	1 619	1 871	1 917
France	15 458	16 399	17 721	18 689	18 420	18 874	18 973	19 507	19 832	20 555
Germany	12 442	13 619	15 553	16 454	17 109	17 019	17 489	18 768	18 858	19 764
Greece	920	820	1 062	954	960	672	1 058	1 041	1 133	1 196
Hungary	476	450	417	401	398	375	379	350	342	319
Ireland	1 252	1 420	1 520	1 604	1 437	1 426	1 327	1 419	1 337	1 514
Italy	3 276	3 333	5 562	5 792	6 468	6 336	5 796	6 150	6 251	4 397
Latvia	65	51	52	47	53	70	158	224	243	330
Lithuania	208	214	215	211	218	209	200	219	219	219
Luxembourg	111	146	136	142	151	145	142	127	116	122
Malta	86	140	118	118	137	99	48	42	23	110
Netherlands	5 911	6 220	6 181	6 152	6 105	5 162	5 833	5 621	5 882	5 963
Poland	916	929	895	1 058	1 034	950	980	1 010	1 078	1 250
Portugal	1 644	1 612	1 748	1 686	2 054	2 145	2 109	2 214	2 372	2 084
Romania	346	337	335	320	314	315	245	265	291	336
Slovakia	15	20	20	19	41	87	147	148	202	300
Slovenia	72	70	69	68	65	71	70	65	77	93
Spain	6 167	7 869	8 402	8 440	8 838	9 234	9 475	9 908	9 755	10 365
Sweden	1 420	1 432	1 455	1 395	1 435	1 212	1 336	1 094	1 041	1 064
Switzerland	3 493	3 997	4 294	990	3 225	2 868	2 529	2 352	2 262	2 628
UK	26 967	28 466	28 819	30 460	28 546	28 397	29 634	31 414	32 715	34 369
Total	89 724	96 674	103 308	103 476	104 755	103 306	106 769	110 369	112 830	115 857

Source: Booz&co: Employment Study 2009. Questionnaires to Member States and Industry information

Annex 8: Maintenance Workshop Workers

Aircraft Mechanics / Maintenance Engineers Employed by Air Transport Operators

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Austria	934	1 014	1 142	1 604	1 176	1 136	1 334	1 322	1 322	1 229
Belgium	2 605	2 778	227	306	499	457	528	461	457	469
Bulgaria	999	996	878	818	363	434	532	595	570	330
Cyprus	41	41	49	51	52	53	53	54	51	50
Czech Rep.	-	-	-	-	298	609	701	719	792	910
Denmark	1 636	1 631	1 512	1 712	1 454	1 360	1 382	163	179	191
Estonia	43	45	44	48	-	-	-	-	-	-
Finland	2 338	2 418	2 350	2 375	2 206	2 186	2 075	1 971	2 043	1 860
France	9 234	9 551	10 042	10 341	10 556	10 175	10 059	9 970	9 810	9 216
Germany	2 420	2 425	2 420	2 040	3 010	4 500	5 550	5 340	6 570	8 020
Greece	1 488	1 334	1 123	1 115	1 102	0	160	161	165	177
Hungary	38	43	42	6	303	305	446	76	13	12
Ireland	315	306	240	310	267	297	331	364	275	306
Italy	3 661	4 061	4 289	4 497	4 244	4 597	4 850	3 330	3 068	1 940
Latvia	52	43	42	43	39	52	60	84	108	122
Lithuania	62	62	62	64	64	64	64	66	67	69
Luxembourg	418	107	455	488	477	488	488	504	517	510
Malta	22	49	51	30	30	33	46	60	59	66
Netherlands	5 162	5 570	5 022	5 399	5 455	4 886	4 895	4 953	5 122	5 192
Poland	440	492	517	474	469	518	573	772	827	832
Portugal	-	4 940	4 971	1 986	2 159	2 123	2 090	2 057	2 115	2 202
Romania	930	971	923	909	910	900	776	783	770	720
Slovakia	3	5	7	6	4	40	66	73	81	85
Slovenia	140	136	149	149	138	136	146	142	182	228
Spain	4 438	4 917	4 915	4 840	4 679	4 734	4 773	4 833	4 748	4 627
Sweden	1 324	1 456	1 520	1 492	1 492	1 321	1 397	128	200	244
Switzerland	566	598	623	693	1 005	1 502	1 954	2 293	2 476	2 592
UK	10 033	10 004	10 059	9 435	9 394	8 713	8 401	8 064	7 308	6 631
Total	49 342	55 993	53 674	51 231	51 845	51 619	53 730	49 338	49 895	48 830

Source: Booz&co: Employment Study 2009. Questionnaires to Member States and Industry information

Annex 9: Employees of Independent Aircraft Maintenance Organisations

Employees of Aircraft Maintenance Organisations										
	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Belgium	-	-	-	-	-	-	-	-	2 469	2 136
Cyprus	5	5	5	5	5	5	5	5	5	5
Czech Republic	-	3 000	3 000	3 000	3 000	3 000	3 000	3 000	3 000	3 000
Germany	22 100	22 800	23 500	24 400	24 200	24 500	24 900	27 100	28 500	29 300
Lithuania	500	650	670	710	790	850	870	920	980	1 050
Malta	38	38	40	40	38	110	140	158	198	210
Portugal	-	-	-	-	-	3 721	3 607	3 496	3 571	3 689
<i>Index (1998=100)</i>	<i>100</i>	<i>104</i>	<i>107</i>	<i>111</i>	<i>111</i>	<i>112</i>	<i>114</i>	<i>124</i>	<i>131</i>	<i>135</i>

Source: Booz&co: Employment Study 2009. Questionnaires to Member States and Industry information

Annex 10: Ground Staff of Air Carriers

Other Airline Ground Employees										
	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Austria	811	839	843	825	761	812	993	1 077	1 039	1 064
Belgium	4 547	4 151	4 240	6	245	208	282	268	226	470
Bulgaria	335	338	235	37	37	37	-	-	-	-
Cyprus	743	722	742	737	735	749	675	610	480	471
Denmark	2 234	2 074	2 164	2 675	2 290	2 225	2 128	159	166	186
Estonia	97	103	101	92	95	98	98	123	131	151
Finland	1 448	1 700	1 491	1 680	1 480	1 280	1 190	1 151	1 175	-
France	12 176	14 452	15 528	15 436	15 440	15 635	15 501	15 825	15 859	-
Germany	9 395	9 841	10 518	11 006	10 669	488	486	419	524	821
Greece	1 414	1 377	2 466	2 556	3 809	-	684	692	748	804
Hungary	938	1 035	949	870	866	941	875	138	66	62
Ireland	3 194	2 349	2 318	2 112	1 291	1 083	1 116	957	1 025	1 127
Italy	3 647	3 762	5 278	4 884	4 756	5 334	4 656	4 562	4 353	2 539
Latvia	47	44	44	45	46	-	-	57	61	70
Luxembourg	1 071	1 117	1 159	1 200	1 162	1 230	1 308	1 377	1 391	1 490
Malta	726	604	687	682	721	689	673	637	542	490
Netherlands	8 102	8 462	8 703	8 574	8 600	7 826	7 587	7 759	7 926	8 035
Poland	54	50	50	53	55	56	46	42	34	37
Portugal	3 251	3 156	3 112	4 581	5 272	5 215	5 216	2 611	1 183	3 402
Romania	411	492	474	391	333	371	298	263	208	242
Slovakia	25	30	20	19	24	22	36	44	34	57
Slovenia	25	25	25	26	39	32	51	46	44	51
Spain	10 703	12 092	11 757	11 715	12 133	13 051	14 354	14 373	15 001	12 114
Sweden	2 053	2 108	2 389	2 483	2 386	2 147	2 156	112	132	164
Switzerland	4 211	4 228	4 743	118	300	604	335	286	289	321
UK	16 150	17 074	17 183	14 413	12 502	10 798	11 699	11 627	11 438	12 402
Total	87 808	92 225	97 219	87 217	86 046	70 930	72 442	65 214	64 075	46 877

Source: Booz&co: Employment Study 2009. Questionnaires to Member States and Industry information (notably IATA)

Annex 11: Independent Groundhandling Service Providers

Independent Groundhandling Organisations

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Belgium	2	2	2	2	2	2	2	2	2	2
Cyprus	8	8	8	8	8	8	8	8	8	10
Czech Republic	-	-	-	-	-	-	-	8	9	19
France	90	104	122	130	133	142	180	187	195	203
Hungary	-	-	-	-	-	4	11	16	24	25
Lithuania	2	2	2	3	4	4	4	5	5	5
Malta	-	-	-	-	-	-	2	2	2	2
Poland	-	-	-	-	-	19	21	24	22	24
Portugal	-	-	12	15	18	22	23	27	29	19
Slovakia	4	5	5	5	8	9	10	11	13	14
Spain	-	22	-	26	26	25	19	29	21	15
Sweden	2	2	2	2	2	2	2	3	3	3
<i>Index (1998=100)</i>	<i>100</i>	<i>114</i>	<i>131</i>	<i>139</i>	<i>145</i>	<i>155</i>	<i>191</i>	<i>200</i>	<i>209</i>	<i>219</i>

Source: Booz&co: Employment Study 2009. Questionnaires to Member States and Industry information

Note on France: These figures are related to airport services which means air terminal operations, aircraft maintenance operations and airspace control in the vicinity of airports

Employees of Independent Groundhandlers

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Belgium	4 310	4 417	4 637	2 409	3 052	2 904	2 877	2 901	2 785	3 027
Cyprus	350	350	350	350	350	380	380	360	350	350
France	4 130	5 488	8 371	8 514	8 854	8 645	10 687	11 281	11 299	11 975
Lithuania	59	63	57	66	76	88	124	389	474	485
Malta	-	-	-	-	-	-	50	65	80	100
Poland	-	-	-	-	-	2 650	2 800	3 100	3 225	3 600
Portugal	--	--	1 935	2 081	2 212	5 250	8 468	9 484	5 913	8 583
Slovakia	83	91	94	110	122	117	139	151	157	165
Scandinavia*					11 844	11 691	11 822	10 958	10 565	10 651
<i>Index (1998=100)</i>	<i>100</i>	<i>117</i>	<i>151</i>	<i>128</i>	<i>139</i>	<i>136</i>	<i>159</i>	<i>169</i>	<i>169</i>	<i>179</i>

Source: Booz&co: Employment Study 2009. Questionnaires to Member States and Industry information

Note: Scandinavia numbers include only those ground support services indicated by SAS.

Annex 12: Direct employment by airports

Employment at Airports

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Austria	-	-	-	-	-	3 402	3 742	4 203	4 514	4 823
Belgium	755	725	752	773	788	787	750	713	752	762
Bulgaria	925	905	1 008	1 036	1 047	1 096	1 106	1 194	1 501	1 742
Cyprus	600	605	608	620	650	700	700	700	700	700
Czech Republic	-	-	1 256	1 386	1 538	1 639	1 779	2 218	2 587	2 685
Denmark	-	-	-	-	-	850	985	1 132	1 226	1 403
Estonia	-	-	-	-	-	278	283	366	422	439
Finland	1 928	1 951	1 978	2 015	1 998	2 133	2 288	1 883	1 776	1 756
France	11 680	11 917	12 503	12 687	13 080	13 349	13 388	13 006	12 727	12 832
Germany	29 505	28 964	30 432	34 097	33 988	34 394	34 691	34 790	34 795	35 217
Greece										702
Hungary										2 570
Ireland	-	-	-	-	-	2 352	3 453	3 620	3 657	3 163
Italy	-	-	-	-	-	6 776	7 183	8 224	9 318	9 052
Latvia										735
Lithuania	846	831	792	789	751	787	716	856	883	951
Luxembourg	-	-	-	-	-	-	-	-	27	178
Malta	784	772	742	730	534	453	389	379	371	368
Netherlands	-	-	-	-	-	2 231	2 216	2 179	2 293	2 578
Poland	-	-	-	-	-	2 822	2 837	2 891	3 125	2 343
Portugal	-	-	-	-	-	1 857	1 861	1 883	1 773	1 722
Romania										n/a
Slovakia	551	569	632	629	642	656	819	908	986	1 057
Slovenia	-	-	-	-	-	307	318	332	372	441
Spain	-	-	-	-	-	-	-	11 149	11 489	12 005
Sweden	-	-	-	-	-	-	-	3 489	3 418	3 413
Switzerland										1 851
United Kingdom	14 088	14 199	14 197	13 126	13 318	13 613	13 881	14 469	15 348	16 229
<i>Index (1998=100)</i>	100	99	102	108	107	109	138	138	140	143

Source: Booz&co: Employment Study 2009. Questionnaires to Member States and Industry information

Annex 13: Employment of air navigation service providers

Air Navigation Service Providers (ANSPs) Total Employment

	2001	2002	2003	2004	2005	2006
Austria	1 013	977	958	939	922	934
Belgium	1 034	1 041	1 044	1 015	1 001	1 003
Bulgaria	1 460	1 440	1 371	1 329	1 353	1 309
Cyprus		234	309	221	269	267
Czech Republic	755	759	752	769	828	858
Denmark	761	760	719	707	661	680
Estonia	100	104	104	103	111	116
Finland	1 921	1 950	2 054	2 105	2 129	2 182
France	8 644	8 898	9 146	9 219	8 994	8 808
Germany	5 137	5 264	5 248	5 169	5 098	4 969
Greece			3 527	3 527	3 527	3 527
Hungary	689	718	677	664	662	685
Ireland	538	548	570	677	650	647
Italy	3 280	3 416	3 351	3 040	3 401	3 393
Latvia	137	118	116	218	249	266
Lithuania	329	323	324	323	328	334
Luxembourg	0	0	0	0	0	0
Malta	193	214	201	183	178	176
Netherlands	1 580	1 678	1 705	1 677	1 620	1 652
Poland					2 998	3 020
Portugal	1 084	1 085	1 028	1 020	1 008	1 004
Romania	1 851	1 848	1 885	1 891	1 896	1 877
Slovakia	511	508	493	483	466	450
Slovenia	135	136	133	153	166	178
Spain	3 484	3 636	3 775	3 847	3 810	3 933
Sweden	1 105	1 119	1 095	1 072	1 051	1 030
Switzerland	1 090	1 261	1 289	1 326	1 335	1 351
UK	5 597	5 003	4 931	4 983	5 048	5 165
<i>Index (2001=100)</i>	<i>100</i>	<i>101</i>	<i>101</i>	<i>101</i>	<i>101</i>	<i>101</i>

Sources : Eurocontrol ACE Benchmarking reports; MUAC; Finavia

Source: Booz&co: Employment Study 2009.

Employed Air Traffic Controller Officers (ATCOs)

	2001	2002	2003	2004	2005	2006
Austria	253	268	285	284	286	283
Belgium	247	253	285	296	286	292
Bulgaria	355	357	343	333	307	301
Cyprus	-	56	65	64	68	69
Czech Republic	171	170	161	163	166	174
Denmark	284	312	306	311	319	316
Estonia	34	31	32	33	33	34
Finland	277	267	277	269	271	242
France	2 566	2 621	2 651	2 749	2 875	2 941
Germany	1 698	1 765	1 665	1 708	1 766	1 799
Greece			667	667	667	569
Hungary	182	192	196	194	193	198
Ireland	273	267	249	255	255	252
Italy	1 522	1 561	1 661	1 468	1 657	1 601
Latvia	59	70	65	56	52	55
Lithuania	88	85	87	87	91	89
Luxembourg	0	0	0	0	0	0
Malta	40	53	54	57	57	57
Netherlands	388	393	403	415	451	451
Poland					355	370
Portugal	216	243	260	258	249	250
Romania	568	585	528	549	584	581
Slovakia	133	137	118	130	129	126
Slovenia	75	77	73	72	76	75
Spain	1 757	1 857	1 985	2 068	2 030	2 078
Sweden	647	557	643	650	656	633
Switzerland	356	347	339	346	340	334
UK	1 759	1 578	1 566	1 592	1 616	1 655
<i>Index (2001=100)</i>	<i>100</i>	<i>101</i>	<i>102</i>	<i>103</i>	<i>106</i>	<i>106</i>

Sources: Eurocontrol ACE Benchmarking reports; MUAC

Source: Booz&co: Employment Study 2009

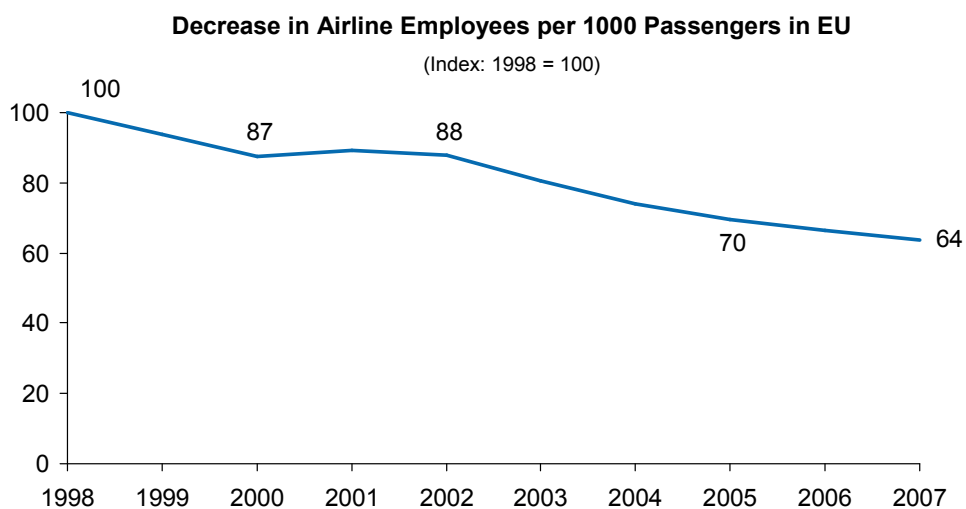
Technical Support Staff at ANSPs

	2001	2002	2003	2004	2005	2006	% of Total 2006
Austria	217	229	231	220	210	207	22.2%
Belgium	221	217	225	211	214	222	22.1%
Bulgaria	612	610	560	548	550	536	40.9%
Cyprus	0	0	67	3	3	2	0.7%
Czech Republic	102	106	108	111	141	148	17.2%
Denmark	131	130	137	122	122	122	17.9%
Estonia	27	23	24	24	23	23	19.8%
Finland	133	120	103	103	127	126	5.8%
France	4082	4107	4147	4085	3768	3539	40.2%
Germany	973	1084	1097	1119	1161	1161	23.4%
Greece			380	380	380	380	10.8%
Hungary	125	124	110	107	107	112	16.4%
Ireland	66	57	63	60	58	54	8.3%
Italy	291	299	213	348	274	302	8.9%
Latvia	4	4	4	95	111	112	42.1%
Lithuania	137	109	106	102	99	100	29.9%
Luxembourg	0	0	0	0	0	0	
Malta	68	88	83	78	73	71	40.3%
Netherlands	523	563	534	504	419	394	23.8%
Poland	0	0	0	0	330	326	10.8%
Portugal	127	138	122	119	120	122	12.2%
Romania	660	638	480	477	470	469	25.0%
Slovakia	142	142	142	128	130	118	26.2%
Slovenia	19	19	19	25	29	25	14.0%
Spain	633	699	696	693	674	857	21.8%
Sweden	68	75	60	70	70	95	9.2%
Switzerland	249	284	293	301	314	326	24.1%
UK	1281	1236	1192	1224	1197	1152	22.3%
<i>Index (2001=100)</i>	<i>100</i>	<i>102</i>	<i>100</i>	<i>102</i>	<i>98</i>	<i>97</i>	

Sources: Eurocontrol ACE Benchmarking reports

Source: Booz&co: Employment Study 2009

Annex 14: Evolution of the index of employment by air carriers per '000 passengers between 1998 and 2007



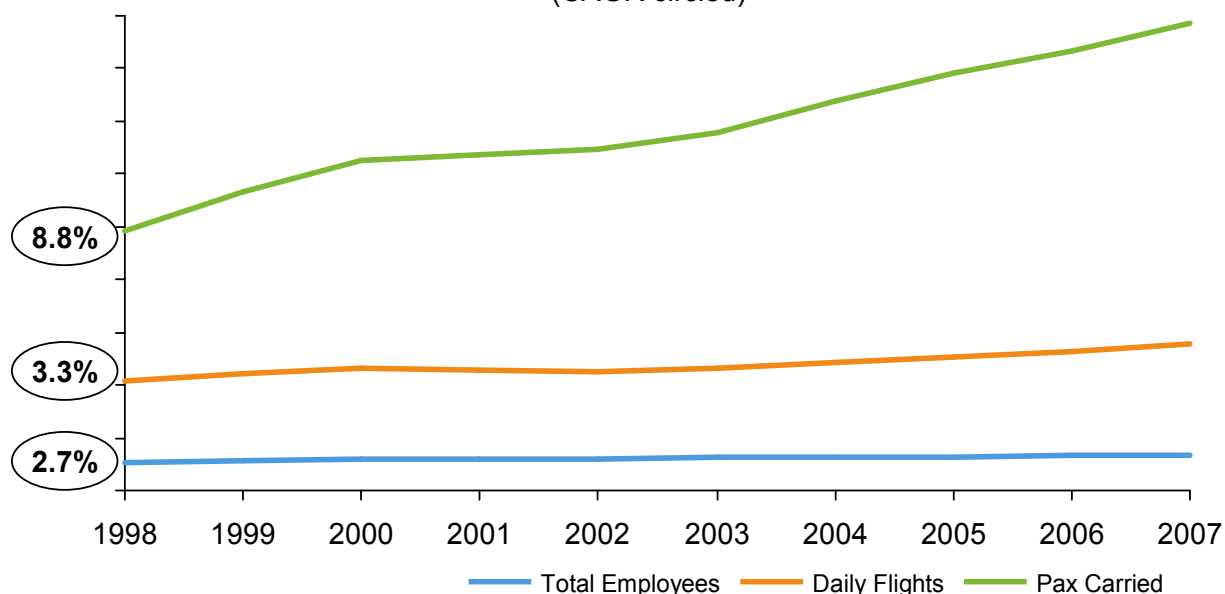
Sources: Questionnaire responses (question 1B.1a); Booz & Co analysis, IATA, Air Transport Intelligence, Annual Reports; Eurostat
Note: these figures were calculated only on data series that were complete for the entire time period; no account is taken of cargo.

Source: Booz&Co: Employment Study 2009

Annex 15: Comparison between employment progression and traffic flow

Comparison of Trends in Employment, Flights Operating and Passengers Carried in EU27+Switzerland

(CAGR circled)



Sources: Questionnaire responses; IATA, Air Transport Intelligence, Eurocontrol, Annual Reports

Notes:

- (1) for passengers carried, only the largest 8 markets are included as data was not available for the entire period (e.g. in the case of the new Member States, is only available from 2004).
- (2) employment data is fragmented. In many occupational fields, data was not supplied for full period. Most commonly, earlier years are missing, which would tend to exaggerate the rate of growth indicated (i.e. the true level may be somewhat lower than 2.7%). The above depiction is reasonably robust, however, as the largest employers (airlines) are reasonably well covered. The recent term trend discernible in airport and other employment is one of modest growth.
- (3) daily flights refers to Eurocontrol area.

Source: Booz&Co: Employment Study 2009

Annex 16: Transnational social dialogue within air carriers

European Works Councils are bodies representing the European employees of a company. Through them, workers are informed and consulted by management on the progress of the business and any significant decision at European level that could affect their employment or working conditions.

Such bodies have been established as provided for by Directive 94/45/EC (recast by Directive 2009/38/EC) in five European air carriers.

Details to be found at:

<http://ec.europa.eu/social/main.jsp?catId=707&langId=en&intPageId=211> and in the database on European Works Councils: <http://www.ewcdb.eu/>

Transnational company agreements are concluded by one or more representatives of a company or a group of companies on the one hand, and one or more workers' organisations on the other. They cover working and employment conditions and/or relations between employers and workers or their representatives.

Nine such transnational company agreements, on mobility, social policy, financial participation, training, social responsibility, position of sales and marketing staff and restructuring have been concluded in three air carriers.

Details are to be found in 'Mapping of transnational texts negotiated at corporate level' (2008) and subsequent documents on:

<http://ec.europa.eu/social/main.jsp?catId=707&langId=en&intPageId=214>

Annexe 17: European social dialogue in the civil aviation sector

A Joint Committee on Civil Aviation was established in 1990. The **Sectoral Social Dialogue Committee** was set up in 2000 in accordance with Commission Decision of 20 May 1998 on the establishment of Sectoral Dialogue Committees promoting the Dialogue between the social partners at European level (98/500/EC). The Committee meets several times a year in plenary meetings and dedicated working groups.

Social partners	
Workers' representatives	Employers' representatives
<ul style="list-style-type: none"> – The European Cockpit Association (ECA) represents some 38 000 European pilots/flight engineers from the National Flight Crew Associations in 38 European countries. – The European Transport Workers' Federation (ETF) represents workers from all transport modes. It represents more than 250 000 civil aviation employees. <p>On 18 June 2009 the Air Traffic Controllers European Unions Coordination (ATCEUC) and the European Transport Workers' Federation (ETF) signed a cooperation agreement to set up the modalities of cooperation between the two workers' organisations in the context of social dialogue. ATCEUC and ETF mutually recognise each other as social partners in the ATM field and as organisations that represent air traffic controllers at European level. ATCEUC recognises ETF as the organisation that represents all other ATM personnel at European level.</p>	<ul style="list-style-type: none"> – ACI Europe the European section of Airports Council International speaks for some 400 airports in 45 European countries. ACI Europe's members account for over 90% of commercial air traffic in Europe. – Association of European Airlines (AEA) represents 35 major airlines in Europe. – European Regions Airline Association (ERA) comprises around 200 companies representing the entire industry including 60 airlines, 20 airports and over 100 associate and affiliate members involved in air transport in Europe's regions. – The International Air Carrier Association (IACA) represents 38 airlines serving the leisure industry. – The Civil Air Navigation Services Organisation (CANSO) represents the interests of the Air Navigation Service Providers worldwide. The European section of CANSO represents 28 European air navigation service providers. – The International Aviation Handlers' Association (IAHA) brings together the world's major independent groundhandling companies.

Representativeness studies for the European civil aviation sector were conducted in 2000 by the European Commission in cooperation with the Université Catholique de Louvain and in 2008 by Eurofound in cooperation with the University of Vienna (<http://www.eurofound.europa.eu/eiro/studies/tn0809027s/tn0809027s.htm>).

It is worth noting that the European Low Fares Airline Association (ELFAA) an organisation established to represent and protect the needs of low fare airlines and their customers is not participating in the European social dialogue. Although having submitted a request in March 2006 to be accepted as a member of the Sectoral Dialogue Committee, the association has not sent all the necessary documentation allowing the Commission to assess its representativeness and mandate.

Key outcomes

During the period 2000-2009, the social partners have tried together to anticipate and to monitor the social, economic and employment consequences of the EU policies affecting the civil aviation industry, sometimes with success, sometimes without. They have adopted joint opinions, joint statements, joint reports, joint declarations, a Charter, guidelines and an agreement. The key outcomes of their activities are:

Economic and sectoral policies

In 2001, the social partners adopted a joint opinion on the crisis in air transport following 11 September. They called upon the Councils of Transport and Finance Ministers to approve measures to provide assistance to the aviation sector to address both economic and social factors affecting the future of the industry.

In the field of ATM, the social partners followed closely the proposals to reform the European airspace. In 2006, they issued a report on the implications of the 'functional airspace blocks'. One year later, they adopted guidelines for consultation arrangements for functional airspace blocks and committed to assess progress on a yearly basis made by their members in order to achieve the agreed goals.

Training and lifelong learning

The social partners of the groundhandling sector jointly organised a conference on best practices on training and qualifications in the sector in June 2008. The conference highlighted the evolution of the European groundhandling sector and the link between training, safety and the quality of service. In May 2009, ACI Europe, AEA, IAHA and ETF signed a joint declaration on training and qualification in the groundhandling sector, which takes its place in having a first and common understanding, examining joint initiatives deriving from the results of the study on good practice conducted on behalf of social partners in preparation of the conference.

Working time

On 22 March 2000, AEA, ERA, IACA, ECA and ETF concluded a European agreement on the organisation of working time of mobile workers in civil aviation. Under this agreement, the number of hours worked annually is not to exceed 2 000 (compared with 2 304 in the general Working Time Directive, from which aviation was excluded) and actual flying hours

are limited to 900. Apart from the working-hours requirement, the agreement includes a number of clauses relating to leave and to the health and safety of cabin crew.

Health and safety

Four of the social partners, AEA, ERA, ECA and ETF, jointly organised a conference in 2008 addressing the Workplace Health Promotion concept for air crew. The European social partners will continue to work together on the improvement of Workplace Health Promotion in carriers operating within the EU. They encourage their affiliates to engage in regular procedures of information and consultation of trade unions and staff representatives, including negotiation where possible, on promoting work health for air crew. The European social partners announced that they will, amongst other things, jointly identify and promote best practices on stress management for air crew and especially on the psychological stressors at work. In addition, they will focus on best practices to improve air crews' ability to manage their private and family time – e.g. through influence on rosters and flexible career development.

Further information: www.ec.europa.eu/socialdialogue