



INTERNATIONAL LABOUR ORGANIZATION  
Sectoral Activities Programme

## **Sectoral coverage of the global economic crisis**

### **The impact of the financial crisis on labour in the civil aviation industry**

by

**Dr Geraint Harvey  
&  
Professor Peter Turnbull**



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**SECTORAL ACTIVITIES PROGRAMME**

**Working Paper**

**THE IMPACT OF THE FINANCIAL CRISIS ON LABOUR  
IN THE CIVIL AVIATION INDUSTRY**

**Final Report**

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## Foreword

Civil aviation is a social and economic pillar of the world economy, a vital component of the global transportation system. Its reach is massive, affecting activities in every aspect of daily life and it is an important source of employment - the industry supports 31.9 million jobs globally

The world previously experienced an aviation catastrophe following the 9/11 attacks in the U.S. Immediate consequences included the collapse of air traffic and passenger revenues and manufacturing shutdowns that produced severe economic uncertainty. The industry has now suffered a second shock via the recent global financial crisis.

The ILO commissioned this report to examine the effects of the crisis on the aviation industry, particularly the extent to which its labour market has suffered from job losses and cost-cutting measures implemented by airlines. As this report illustrates, the crisis directly struck employment in the aviation industry, recording deep job losses in the millions and accompanying social upheaval. Executives uniformly agree that the effects of the crisis on the industry will leave their mark for years.

The report also examines the importance of labour relations, the manner in which job losses have been managed and avoided, and the preferred socially responsible responses to the crisis.

Cooperation between employers and unions is essential to address the human resource implications of the crisis. In this regard, the report emphasizes that through social dialogue, the ILO can play a pivotal role in developing policies by which airline companies implement business models to protect and improve working conditions in their industry.

This study is part of a series of working papers aimed at monitoring the dynamics of the crisis in different economic sectors, understanding the implications for employment and working conditions, and developing policy alternatives for constituents in line with the ILO's Global Jobs Pact.

Elizabeth Tinoco  
Director  
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## **Abbreviations**

AEA	Association of European Airlines
ANSP	Air navigation service provider
APDC	Airline Personnel Directors Conference
ATC	Air traffic control
ATCO	Air traffic control officer
CANSO	Civil Air Navigation Services Organisation
ECA	European Cockpit Association
ETF	European Transport Workers' Federation
IALPA	International Airline Pilots Association
IATA	International Air Transport Association
ICAO	International Civil Aviation Organization
IFATCA	International Federation of Air Traffic Controllers' Associations

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## Executive summary

This study investigates the impact of the global financial crisis on labour in the civil aviation industry. The research was conducted using primary and secondary source data collected by way of interviews and a questionnaire survey of trade unions and civil aviation company management.

The global financial crisis has impacted severely on airlines and airline labour around the world. The crisis has resulted in job reduction programmes and alterations to work. Between May 2008 and May 2009, jobs were cut at several of the major US airlines; for example, at United Airlines (6,600), American Airlines (4,900), Northwest Airlines (4,300), Delta Airlines (3,300), US Airways (1,900), and Continental Airlines (1,500). In Europe, UK-based airline XL Airways (employing around 1,700 staff) and Russian carrier Dalavia (employing around 2,800 staff) ceased trading. Other carriers such as Aer Lingus, AirFrance-KLM and Scandinavian Air Services have announced job reduction programmes (of 1,500, 3,000 and 9,000, respectively). In Asia Pacific, the Australian airlines Qantas and Virgin Blue have announced 1,750 and 400 job losses, respectively, while Air New Zealand plans to retrench 200 jobs.

Aside from job losses, employees have been affected by reduced working time, for example, Lufthansa has reduced the hours of 2,600 air freight division employees. Pay freezes have also been implemented, for example, at Singapore Airlines, British Airways, bmi and Virgin. However, most commonly, workers have been offered unpaid leave and asked to work without pay. These policies were evident at BA, where employees were asked to work for one month without pay; at Air India, where 15,000 employees were asked to take leave without pay for between 3 and 5 years; at Cathay Pacific, where 17,000 employees were asked to take up to four weeks holiday without pay; and at Japan Airlines, where 16,000 employees were asked to take two months unpaid leave.

The survey of trade unions representing airline employees indicates the most common response to the current crisis to be a recruitment freeze (reported by 80 per cent of respondent airline unions). Other common cost cutting measures designed to avoid the enforced lay-offs of core staff include voluntary redundancy (reported by 57 per cent of respondent airline unions); non-renewal of temporary contracts (57 per cent); pay freeze (51 per cent); probationary staff not being transferred to full time contracts (44 per cent); voluntary retirement (43 per cent); and unpaid holiday leave (43 per cent). Despite all of this, 38 per cent of unions reported compulsory redundancy.

International or major airlines rather than domestic or regional carriers were more likely to introduce these policies (as they were among ground handling firms as opposed to catering, maintenance or airports). Compulsory redundancy, voluntary furlough and compulsory furlough were more likely to affect North American employees than their counterparts in either Europe or Asia Pacific.

The survey of airline management reveals that cabin crew were the group hardest hit by the crisis.

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In Europe, several examples of good practice have emerged. AirFrance-KLM have announced that the 3,000 job cuts required will be achieved through suspending hiring, not renewing temporary contracts and not replacing retiring members of staff, thereby avoiding redundancies. In the UK, consultation between British Airways and the British Air Line Pilots Association (BALPA), the trade union for pilots in the UK, has led to agreement over a cost reduction package that will save the airline £26million per year. Similarly, Thomson Airways has engaged in elaborate discussion with BALPA in order to arrive at an agreement on a 5 per cent pay cut for pilots employed at the airline in order to save up to 100 pilot jobs.

The situation for air navigation service providers (ANSPs) is especially important as many are prevented from holding financial reserves or obtaining commercial loans. With falls of up to 20 per cent in revenues, ANSPs face an unprecedented financial crisis. Moreover, it has been claimed that ANSPs are currently operating with insufficient, making a reduction in headcount difficult if not impossible. The Civil Air Navigation Services Organisation (CANSO) claims that ANSPs have responded to the crisis by reducing staff overtime and/or external staff numbers; freezing pay; offering voluntary early retirement; and reducing training.

Unions representing air traffic control officers (ATCOs) report less widespread use of HR policies to assuage the impact of the crisis. For example, 24 per cent of respondents identified a recruitment freeze; no respondent identified voluntary or compulsory redundancy, reflecting the staff shortages, while compulsory furloughs were reported by only 5 per cent. Non-renewal of temporary contracts (24 per cent) and remuneration adjustments such as pay freezes (reported by 29 per cent) were far more widespread.

Reduced training (reported by 38 per cent of respondents) was the most widely used policy. This is of considerable concern to unions who argue that training is fundamental to the safe operation of air traffic management and to the successful implementation of the new SESAR and NEXTGEN technologies, which require experienced ATCOs. It has been argued that the safe introduction of these technologies necessitates not only greater levels of staffing, but also more extensive training. Reduced training is thus seen as a considerable threat to the general operation of air traffic management and certainly to the safe introduction of these new technologies.

The majority of the policies listed were considered by unions to be acceptable only as a short-term or crisis response. For airline employees, recruitment freeze, non-renewal of temporary contracts and pay freeze had been widely implemented. Also, whereas a previous study has shown that many of the human resource policies listed were deemed unacceptable under any circumstances, these policies have been extensively used by airline management. Reflecting the critical nature of training to the industry, no ANSP union considered reduced training to be acceptable under normal circumstances (while two thirds deemed this policy to be unacceptable under any circumstances).

There was broad agreement among union respondents that there was no differential impact of restructuring based on gender. However, the groups hardest hit by restructuring have been cabin crew, heavily populated by female workers.

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The impact of the global financial crisis on working and employment conditions has been immediate, significant but also extremely varied. The response of companies in the industry has ranged from the immediate and unilateral to the considered and consultative. There is clear evidence that social dialogue is an effective and preferred means to achieving a feasible, successful and acceptable business model for the current aviation climate.





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## 1. Introduction

The civil aviation industry is a social and economic pillar of the world economy. The global economic impact of civil aviation is estimated to be around US\$3.5 trillion, equivalent to 7.5 per cent of world GDP.<sup>1</sup> In 2006, civil aviation contributed US\$408 billion directly to global GDP, as much as the pharmaceuticals industry, and a further US\$465 billion indirectly through the ‘multiplier’ effects of aviation-related jobs and economic activity. The industry supports 31.9 million jobs globally; it created 5.5 million jobs directly in 2006 (with 4.7 million people employed by airlines and airports and around 800,000 employed in the civil aerospace sector) and a further 6.3 million jobs via the purchases of goods and services in the air transport supply chain; 2.9 million jobs are created by the spending of employees; and 17.1 million jobs are created through air transport’s ‘catalytic’ impact on tourism. However, the synergy between the global economy and demand for air transportation means that in any economic downturn, civil aviation companies will suffer – and suffer more than most. While the global crisis of capitalism has wrought its effects on virtually all industrial sectors, the impact on the international civil aviation industry has been especially severe.

The research commissioned by the ILO examines the impact of the global financial crisis on the major civil aviation markets of the world economy, namely, North America, Europe and Asia Pacific, along with connecting intercontinental markets (some data have been gathered, *en passant*, for Africa, South America and the Middle East). The research focuses on the restructuring of several different types or categories of airline, namely, scheduled/full service, regional, low-cost and charter. In addition, information has been obtained from the air navigation service providers (ANSPs) that support civil aviation.

This research paper investigates the impact of restructuring on the workforce at both airlines and ANSPs. In particular, the study explores job losses and how these are managed (e.g., voluntary or compulsory, selection criteria, etc), how job losses have been avoided (e.g., early retirement, short-time working, extended vacations) and any other changes to workers’ terms and conditions of employment (e.g., pay cuts, suspension of bonus payments, extended hours, etc).

The research methodology follows that of a previous study conducted by the authors for the ILO in 2001 in the wake of 9/11,<sup>2</sup> namely:

- A global overview has been established in the first instance through contact with major industry associations, the International Air Transport Association (IATA) and the International Civil Aviation Organisation (ICAO). An extensive review of secondary data has been undertaken, including, but not limited to: company reports/websites; financial press; quality newspapers;

<sup>1</sup> Data from ATAG (2006), *The Economic and Social Benefits of Air Transport 2008*, Geneva.

<sup>2</sup> Turnbull, P. and Harvey, G., *The Impact of 11 September on the Civil Aviation Industry: Social and Labour Effects*, ILO Sectoral Working Paper No. 182, Geneva: International Labour Office, 2001.

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industry press, for example, *Flight International*, *Airline Business* and *Air Transport World (ATW)*; trade union publications and websites, especially the International Transport Workers Federation (ITF), European Transport Workers Federation (ETF), International Air Line Pilots Association (IALPA) and the European Cockpit Association (ECA); and specialist industry organizations (e.g., the Association of European Airlines, IATA and ICAO). Both Swansea University and Cardiff University libraries' extensive range of electronic data sources and search engines facilitated this review (e.g., access to IATA Economics – analysis of economic and policy developments affecting the financial performance of the global airline industry; ATW Data/Airline Economics Channel – analysis and forecasts).

- Questionnaire surveys of airline and ANSP management, distributed by the AEA, the Civil Air Navigation Services Organisation (CANSO) and the Airline Personnel Directors Conference (APDC), and of airline and ANSP trade unions, namely, ITF, IFATCA and IFALPA affiliates. The questionnaire survey of airline management returned 13 usable responses (six from European airlines; two from North American carriers; two from Middle Eastern airlines; and three from Asia Pacific airlines). The survey of ANSP management returned only five responses (two each from Europe and Africa and one from Asia Pacific). Sixty-one trade unions representing airline employees responded (33 from Europe; 10 from Asia Pacific; eight from Africa; five from Latin America; one from the Middle East; four from North America), as did 21 unions representing ATC employees (13 from Europe; three from Asia Pacific; two each from Latin America and the Middle East; and one from North America). The questionnaire data has been analysed using SPSS 16.
- Several interviews have been conducted as a “follow-up” to the secondary data analysis, designed to elicit a more detailed picture of the impact of the restructuring and the consequences for the industry’s workforce. These interviews have explored changes to schedules/service, sub-contracting, job losses, the impact on different categories of staff/occupational groups, measures to avoid redundancy, consultation with the workforce, and any changes to other terms and conditions of employment arising from the current crisis.

To facilitate comparison with the last major downturn in the industry, the format of the current report will follow that of the previous study. The contents will be as follows:

Section 1: Introduction – in which we discuss the purpose of the research; summarise the research methodology; and present a synopsis of the sections that follow.

Section 2: Labour relations in the civil aviation industry – in which we discuss the peculiar idiosyncrasies of the civil aviation industry that give rise to especially problematic industrial relations, i.e., the perishable nature of the airline product; the pro-cyclical demand for air transportation; and high proportion of labour costs. These were considered in the previous report and are described briefly here. Moreover, we consider changes to the competitive and legislative environments for civil aviation since 2001 and the last report, which have created further challenges

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for industrial relations (e.g., the ongoing deregulation of the industry and pervasiveness of the low- cost operating model).

Section 3: Labour restructuring in response to the global financial crisis – in which we report the extent both of job losses announced by airlines and ANSPs throughout 2008/9 and of the alternative HR policies implemented by such companies to deal with the impact of the crisis. This section will feature primary and secondary data analysis. The primary data have been gathered from management and union sources: respondents were asked whether firm restructuring had led to the introduction of a range of HR policies for their employees/members. This section also presents data on the degree to which the policies have affected different categories of employee. The primary data are analysed separately so that the perspective from airline management, ANSPs management, airline unions and ANSPs unions can be compared and contrasted.

Section 4: Determining the response to the crisis – in which we analyse data from airline and ANSP management on the factors determining the HR policy response to the crisis. Management respondents were asked whether the policies implemented had been determined by collective agreement, based on legal provision and/or as a result of some other arrangement.

Section 5: Preferred response to the crisis – in which we analyse data from union respondents on the degree to which each of the HR policies is deemed acceptable by unions and so determine what might be regarded as “socially responsible ways to respond to the crisis”. Union respondents were asked to consider whether the policy would be “Acceptable under normal circumstances”, “Only acceptable as a short term measure” or “Unacceptable under any circumstances”. In this section, we contrast the views of management and unions on their preference on government support for various policies to assist aviation companies.

Section 6: The differential impact of the crisis on men and women – in which we consider data from union respondents on the differential gender impact of the various HR policies implemented.

Section 7: Conclusions – in which we comment on the impact of the crisis on labour in the industry.

The questionnaire surveys are included in the Appendix.

## **2. Labour relations in the civil aviation industry**

As we have argued previously, labour relations have always played an important part in the competitive performance of airlines and other companies in the civil aviation industry.<sup>3</sup> Historically, strikes and other forms of industrial conflict have attracted a great deal of adverse attention, no doubt because of their visibility and

<sup>3</sup> Turnbull, P., and Harvey, G. (2001), *The Impact of 11 September in the Civil Aviation Industry: Social and Labour Effects*, Working Paper No. 182, Geneva: International Labour Office.

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the immediate impact of any work stoppages on passengers and revenue. The threat of strike action by cabin crew at British Airways in 2007, for example, cost the airline an estimated £80 million. Disputes such as these often lead to deterioration in employee morale, job satisfaction and, as a result, a decline in customer satisfaction.<sup>4</sup>

Three important features of the industry ensure that industrial relations are invariably an urgent endeavour. First, the industry's product is perishable and airlines have no real inventory. Thus, if flights are cancelled, airlines cannot "stockpile" or easily recover lost traffic in the immediate future. Second, demand for air transport is pro-cyclical, that is, air traffic generally expands (contracts) with increased (reduced) economic growth, but at a much faster rate. Business class travel is particularly sensitive to economic fluctuations, which has a disproportionate impact on airlines' revenue and profitability. Third, labour accounts for a significant proportion of total operating costs and is one of the few variable costs under the direct and more immediate control of management (unlike fuel costs, landing charges, aircraft costs, etc.). Labour costs typically account for a fifth of the operating costs of Asian airlines and a third for European and US carriers.<sup>5</sup> In other areas of the industry, such as air traffic control, around two-thirds of operating costs are labour costs.

These three features of the industry have important implications for human resource management policies and labour relations. First, the "perishability factor" means that in response to any crisis, airlines will try to move quickly to cut capacity in order to minimize financial losses. Capacity cuts invariably result in job losses, both directly and indirectly (i.e., jobs are lost at the airline in question and in a range of support activities such as catering, cleaning, fuelling, airport services, local suppliers, etc.). It has been argued that for every one job lost in an airline, between four and ten jobs will be lost inside the perimeter of the airport and a minimum of a further three jobs per airline lost outside the perimeter.<sup>6</sup> In the words of one union official, "Job losses in the industry are like a wave, or a ripple on a pond. It starts with the airlines and just gets bigger and bigger the further out you move from the airport to the local community and related businesses".<sup>7</sup>

The second factor, the pro-cyclical nature of the industry, is illustrated in Figure 1. This particular pattern of demand often means that the expectations of management and labour are out of step with current or future market conditions. For example, during any downturn or crisis, when airlines suffer a more significant decline in demand than most related businesses, costs will be tightly controlled and employees are often expected to make sacrifices to safeguard the financial position

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<sup>4</sup> Lebrecht, D. (1999), *Effects on Airline Employees of Growing Competition*, *Airline Industrial Relations Conference*, SMi Group, 25-6 October, London.

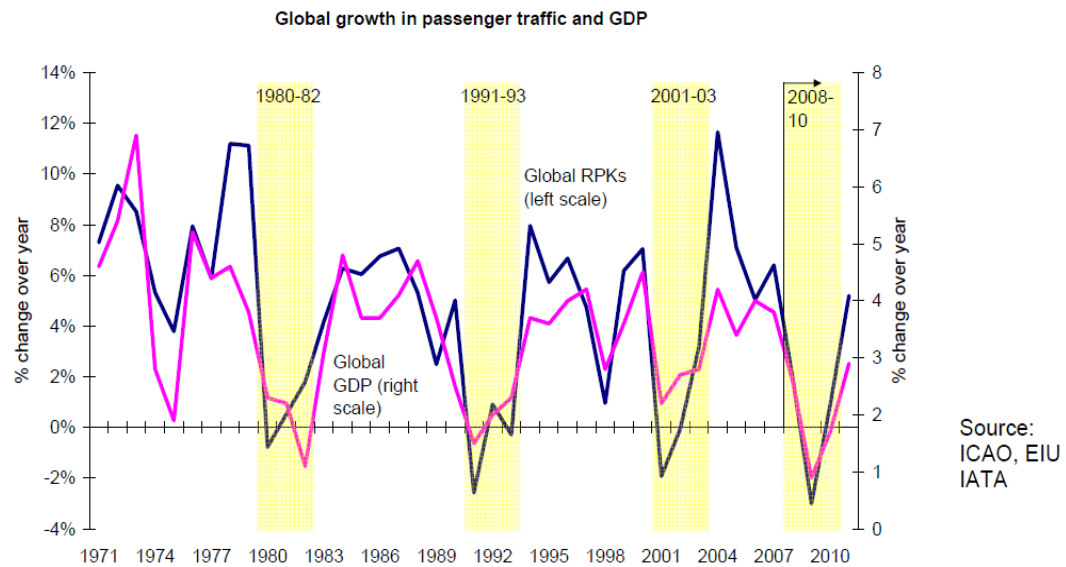
<sup>5</sup> Doganis, R. (2006), *The Airline Business*, London: Routledge.

<sup>6</sup> TGWU (2001), Evidence to the Transport Sub-Committee from the Transport and General Workers' Union, London: TGWU.

<sup>7</sup> Interview notes.

of the airline. When business picks up, airlines still tend to be cautious on costs, knowing that traffic might be lost to rivals in an increasingly competitive and deregulated aviation market or adversely affected by any future downturn. Employees, in contrast, anticipate improvements in pay and benefits in line with business prosperity, as well as an element of “catch up” to make up for previous sacrifices. This “mismatch” is most apparent, and potentially most explosive, at the peak of the business cycle, when employee expectations are still rising but airlines anticipate, or actually face, falling demand.

**Figure 1. Pro-cyclical demand and economic crises in the civil aviation industry**



Source:  
ICAO, EIU  
IATA

Source: IATA

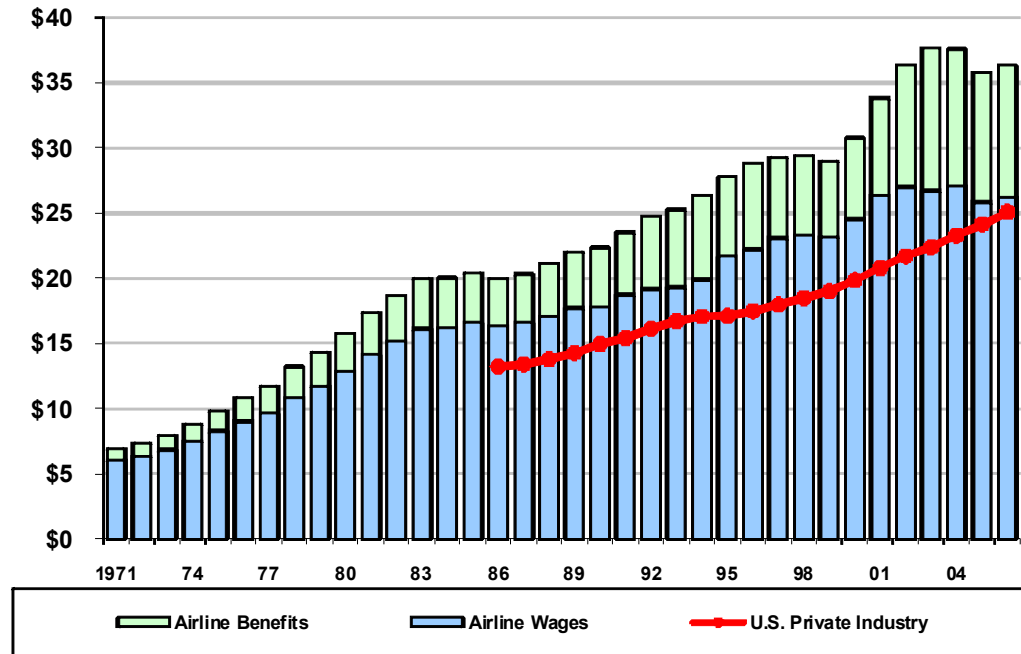
The third factor – airlines’ cost structure – means that adjustments made in response to any crisis invariably focus on labour costs. In fact, in an age of globalization and an ever more deregulated operating environment, labour increasingly bears the brunt of cost-cutting programmes, service quality initiatives, outsourcing strategies, etc. Indeed, after 9/11 the cost reduction strategies of airlines, especially those based in North America, included a range of HR policies designed to elicit cost reduction from labour, most notably voluntary and compulsory redundancies.<sup>8</sup> Despite this, US airline employment costs have continued to rise in line with general wage increases and the consumer price index, as illustrated in Figure 2, which is testament to the bargaining power of organized labour.<sup>9</sup> More importantly, while labour cost reductions have provided short-term

<sup>8</sup> Turnbull, P., and Harvey, G. (2001) *The Impact of 11 September in the Civil Aviation Industry: Social and Labour Effects*, Working Paper No. 182, Geneva: International Labour Office.

<sup>9</sup> Civil aviation is one of the most highly unionized industries in the USA.

relief for US carriers, this has not led to long-term improvements in operational performance (productivity and service).<sup>10</sup>

**Figure 2. Trends in airline wages relative to US private industry and airline benefits**



These features have assumed greater importance in recent years due to changes to the competitive and legislative environment of civil aviation. Both domestic and international competition has intensified markedly as a result of deregulation, liberalization, and the commercialization or full privatization of many airlines. Liberalization permitted the establishment of the low-cost airline - the success of this model, particularly since the industry crisis that followed 11 September 2001, has proven especially problematic for labour as many traditional scheduled or legacy airlines have set up their own low-cost airline, while others have been forced to cut costs in order to compete. In the latter case, labour plays an ever more prominent role in the competitive strategies of carriers that seek to reduce fares while maintaining or improving service quality. Further liberalization of the industry is set to exacerbate matters for labour as many airlines stand to gain (and many trade unions to lose) from ever increasingly open skies.<sup>11</sup>

<sup>10</sup> Bamber, G.J., Hoffer Gittel, J., Kochan, T.A. & von Nordenflytch, A. (2009), *Up in the Air: How Airlines Can Improve Performance by Engaging their Employees*, New York: Cornell University Press.

<sup>11</sup> Turnbull, P., and Harvey, G. (2009), *Just Another Crisis? Recession, Legislation and the Future of Industrial Relations in the International Civil Aviation Industry*, presented at the BUIRA conference, Cardiff (June).

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### 3. Labour restructuring in response to the financial crisis

The global financial crisis has profoundly affected civil aviation. Its impact on the industry has already eclipsed that of 9/11. In June 2009, Giovanni Bisignani, Director-General of the International Air Transport Association (IATA), stated that the current economic crisis has produced a civil aviation context without ‘modern precedent ... This is the most difficult situation that the industry has faced’. Comparing the current crisis with that which followed 9/11, Mr Bisignani noted that revenues fell by 7 per cent post-2001 whereas the anticipated decline in 2009 is 15 per cent. Today’s crisis is expected to reduce passenger demand by 8 per cent and freight traffic by 17 per cent. The operating losses of the world’s top 150 airlines in 2008 totalled US\$15bn, marking a massive US\$44bn swing from the US\$29bn profit recorded by these airlines in 2007.<sup>12</sup>

IATA estimates indicate that no geographical region will be immune to the crisis with anticipated losses of: US\$1 billion among US carriers; US\$1.8 billion among European carriers; US\$3.3 billion among Asia-Pacific airlines; US\$1.5 billion among Middle Eastern carriers; US\$900 million among Latin American airlines; and US\$500 million among African carriers. In the words of Paul Coby, Chief Information Officer at British Airways, “This economic crisis which we are facing today is different to any other we have faced in our lifetime. It is hitting every region. What next? The four horsemen of the apocalypse?”<sup>13</sup>

In the USA there were thirteen airline bankruptcies in 2008. Already in 2009, several US airlines have ceased trading, leading to the loss of thousands of jobs, e.g., Aloha Airlines (1,900 staff) and ATA Airlines (2,300 staff). Reminiscent of their response to the crisis following 9/11, US airlines moved very quickly to announce employment cutbacks (see Table 1), in spite of the less unfavourable circumstances faced by these airlines in 2008. It has been argued that US carriers would be able to weather the crisis better than airlines in other geographical regions as a result of the changes made by the airlines early in 2008 in response to increased fuel prices. US airlines responded to the fuel price inflation by retiring older and less economical aircraft and so were better placed to deal with the reduction in demand. Moreover, airlines in the US have a much lower level of fuel hedging and so stood to benefit from the sharp reduction in the cost of oil throughout 2008.<sup>14</sup> Bureau of Transport Statistics, presented in Table 1, illustrate the actual headcount reduction at the US majors and larger low-cost and regional airlines between May 2008 and May 2009.

<sup>12</sup> *Airline Business* (August, 2009). The last time the world’s top 150 airlines sank into the red was in the wake of 9/11, when they lost US\$5.7bn.

<sup>13</sup> *Airline Business* (August 2009).

<sup>14</sup> Schofield, A., and Wall, R. (2008), “Role Reversal”, *Aviation Week and Space Technology*, 169(23) December 15<sup>th</sup>, Pages 34-35.

**Table 1. Initial and actual job reductions among US majors and larger low-cost and regional carriers**

Carrier	Initial lay-offs announced in 2008	Actual FTE headcount differential (May 2008 and May 2009)	
		Total	% of workforce
Southwest	NA	1,500	4.4
American Eagle	NA	(500)	(5.8)
Continental	3,000	(1,500)	(4.1)
US Airways	1,700	(1,900)	(5.8)
Delta	4,000	(3,300)	(6.9)
Northwest	2,500	(4,300)	(14.7)
American Airlines	7,000	(4,900)	(6.6)
United Airlines	7,000	(6,600)	(12.6)

Note: \* FTE (full time equivalent employees) include all employees, with two part time employees included as one full time employee.

Job reduction at the recently merged Delta/Northwest reflects the innovative approach adopted by the former in response to the industry crisis after 9/11.<sup>15</sup> At that time, the airline offered six different voluntary job reduction programmes, so that only 2,000 of the required 11,000 job losses were involuntary. Similarly, in 2008, Delta offered a voluntary severance scheme to 4,000 employees. The merged airline announced that the same approach would be used to reduce its 75,000 strong staff by 8 per cent in 2009.

In Europe, several airlines have also ceased trading. For example, UK-based XL Airways, which employed around 1,700 staff, and Dalavia, the Russian carrier formerly employing around 2,800 staff, have gone bust. Job reduction schemes have been widespread among European airlines. In the autumn of 2008, Aer Lingus announced 1,500 job losses; in July 2009, the airline proposed a further headcount reduction of 800 staff. Scandinavian Air Services has announced the most radical job reduction plans in Europe with 9,000 job losses (some 40 per cent of the employee workforce).

Policy alternatives to job cuts occurred at Lufthansa, which planned to reduce the working hours of 2,600 employees at its air freight operations.<sup>16</sup> Meanwhile, pay freezes were imposed on staff at BA, bmi and Virgin (the latter consulting with staff over the possible loss of 600 jobs, while the CEO of BA has asked staff to work one month without pay). Finnair has limited its redundancies, to around 120 jobs lost, by temporarily laying off 380 staff in addition to 3,000 who will be out of work for a month. The firm will also not renew the temporary contracts of 400 staff. Fellow Finnish airline Blue1 has implemented a scheme whereby each of its 100 pilots was laid off for 11 days between January and May 2009.

In the Asian Pacific region, anticipated to be hardest hit by the current financial crisis, Oasis Hong Kong Airlines (with some 700 staff) ceased trading. Air New

<sup>15</sup> See Turnbull, P., and Harvey, G. (2001), *The Impact of 11 September in the Civil Aviation Industry: Social and Labour Effects*, Working Paper No. 182, Geneva: International Labour Office.

<sup>16</sup> Lufthansa was ranked as the most profitable airline worldwide in 2008. It is also the world's top carrier by revenue (*Airline Business*, August 2009).



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Zealand has retrenched 200 jobs, while Australian carriers Qantas and Virgin Blue have announced 1,750 and 400 job cuts, respectively. The latter has also required that senior managers take a 30 per cent pay reduction. In October 2008, Indian airline Jet Airways sacked 800 employees, of 1900 planned redundancies, only to reinstate them several days later following industrial action at the airline.<sup>17</sup> It considered alternative labour cost savings policies, including a recruitment freeze and the non-renewal of temporary contracts. The airline has announced plans to reduce salaries by between 5 per cent and 25 per cent.

Asia Pacific airlines have also introduced policy alternatives to job reduction. For example, furloughs have been introduced at Air India whereby 15,000 workers were given the opportunity to voluntarily take leave without pay for three to five years. In April 2009, Cathay Pacific asked that its 17,000 employees take up to four weeks unpaid holiday in the subsequent 12 months. Singapore Airlines has frozen wages and required that personnel take one day's leave per month as annual or unpaid leave. Similarly, in January 2009 Japan Airlines required its 16,000 employees to take two months unpaid leave. The airline also temporarily suspended its pilot training, raising concerns about aircraft safety and the airline's ability to meet the inevitable increase in demand on the economic upswing due to the global shortage of pilots.

Elsewhere, the South African budget carrier, Nationwide Airlines, employing some 800 staff, ceased trading, while the Mexican airline, AeroCalifornia, was grounded in July 2008 as a result of unpaid debts.

The survey of trade unions representing airline staff reveals the most common response to the current crisis to be a recruitment freeze (reported by 80 per cent of respondent airline unions).<sup>18</sup> Other common cost-cutting measures designed to avoid the enforced lay-offs of core staff include voluntary redundancy (reported by 57 per cent of respondent airline unions); non-renewal of temporary contracts (57 per cent); pay freeze (51 per cent); probationary staff not being transferred to full time contracts (44 per cent); voluntary retirement (43 per cent); and unpaid holiday leave (43 per cent). Despite all of this, 38 per cent of unions reported compulsory redundancy.

International or major airlines rather than domestic or regional carriers were more likely to introduce these policies (as they were among ground handling firms as opposed to catering, maintenance or airports). Compulsory redundancy, voluntary furlough and compulsory furlough were more likely to affect North American employees than their counterparts in either Europe or Asia Pacific.

The survey of airline management asked respondents to assess the impact of the crisis on various employee groups on a scale of 1 to 5, whereby 1 indicates a marginal impact and 5 indicates an extensive or severe impact. Table 2 reports the

<sup>17</sup> The national government in India has openly criticised airlines that have tried to retrench large numbers of staff.

<sup>18</sup> Recruitment freeze was also the most common policy introduced in the wake of 9/11, with 83 per cent of respondent unions recognizing this policy at airlines in which they represented workers.

percentage response for each employee group, whereby greater percentages in higher numbers reflect a more detrimental impact. These data indicate that cabin crew have been most severely affected.

**Table 2. Impact of the crisis on various airlines' employee groups**

Employee group	Impact severity of the crisis				
	1	2	3	4	5
Flight crew	69	15	8	8	0
Cabin crew	46	8	23	15	8
Ground handling	31	8	39	8	0
Check-in staff	39	0	46	8	0
Customer services	53	0	39	0	0
Marketing	53	0	31	8	0
Catering	15	0	15	15	0
Cleaning	31	0	23	0	0
Fuelling	39	0	8	0	0
Administration	53	8	31	8	0

N.B.: these data reflect the omission of response and so the percentages for the impact of the crisis do not sum to 100.

In Europe, several examples of good practice have emerged. AirFrance-KLM have announced that the 3,000 job cuts required will be achieved through suspending hiring, not renewing temporary contracts and not replacing retiring members of staff thereby avoiding redundancies. In the UK, consultation between British Airways and the British Air Line Pilots Association (BALPA), the trade union for pilots in the UK, has led to agreement over a cost reduction package that will save the airline £26million per year. The deal will entail a 2.61 per cent cut in basic pay and a 20 per cent reduction in flying time allowances (leading to a saving of £16million). Moreover, an increase in annual duty hours, a reduction in turnaround times on short haul flights and reduced crewing arrangements on some long haul flights would save the company a further £10million. The pay reduction and productivity deal has been exchanged for shares worth £13million, to be given in June 2011 if certain company targets are achieved.

Similarly, Thomson Airways has engaged in elaborate discussion with BALPA in order to arrive at an agreement on a 5 per cent pay cut for pilots employed at the airline in order to save up to 100 pilot jobs. The latter has been described by the union as a 'landmark agreement', which ensures the retention of 96 pilot jobs that would otherwise have been lost as a result of the airline's decision to operate eleven fewer aircraft. The agreement entitles pilots to additional days off in lieu of their loss of pay. BALPA General Secretary, Jim McAuslan, said the deal reflected a partnership of 'mutual trust and mutual respect' between the union and the airline and their shared 'desire to find an answer, not a problem'.<sup>19</sup>

<sup>19</sup> www.balpa.org

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As indicated above, the knock-on effects of the reduction in the capacity of airlines can be substantial, both inside and outside of the civil aviation industry. The impact of the current crisis in civil aviation on the air navigation service providers (ANSPs) is especially potent as many are prevented from holding financial reserves or obtaining commercial loans. With falls of up to 20 per cent in revenues, ANSPs are, in the words of Alexander Ter Kuile, Secretary-General of CANSO, ‘facing an unprecedented financial crisis which may result in them not being able to meet their financial obligations’.<sup>20</sup> Moreover, ANSPs are restricted in their HR policy response to the crisis due to the spartan staffing of ANSPs by air transport control officers (ATCOs).<sup>21</sup> IFATCA claims that around 3,000 ATCOs are required to meet the present needs of the world’s ANSPs, adding the caveat that this is a conservative estimate as many ATCOs are currently working excessive overtime.<sup>22</sup> CANSO claims that ANSPs have responded to the crisis by reducing staff overtime and/or external staff numbers; freezing pay; offering voluntary early retirement; and reducing training.

Unions representing ATCOs report the use of far fewer HR policies that affect their members: only 24 per cent of respondents identify a recruitment freeze; no respondent identified voluntary or compulsory redundancy, reflecting the staff shortages, while compulsory furloughs were reported by only 5 per cent. Non-renewal of temporary contracts (24 per cent) and remuneration adjustments such as pay freezes (reported by 29 per cent) were far more widespread.

Reduced training (reported by 38 per cent of respondents) was the most widely used policy. This is of considerable concern to IFATCA and its affiliate unions representing ATCOs, who claim that training is fundamental to the safe operation of air traffic management. Moreover, they argue that the ‘concept design, development, prototyping, testing and validation’ of the new SESAR and NEXTGEN technologies will require experienced air traffic controllers. The safe introduction of these new advanced technologies necessitates not only greater levels of staffing, but also more extensive training. Reduced training is thus seen as a considerable threat to the general operation of air traffic management and certainly to the safe introduction of these new technologies.

#### **4. Preferred response to the crisis**

In order to determine what might be regarded as “socially responsible ways to respond to the crisis”, trade unions were asked how acceptable a range of different human resource policies would be to their members. Responses ranged from “Acceptable under normal circumstances”, “Only acceptable as a short term/crisis measure” and “Unacceptable under any circumstances”. The response of trade

<sup>20</sup> CANSO’s Open Letter to Aircraft Operators, 27 March 2009

<sup>21</sup> Michaels, D. and Pasztor, A., “Staffing Shortages Raise Concerns About Air Safety”, *Wall Street Journal Europe*, 8<sup>th</sup> May 2008.

<sup>22</sup> *Ibid.*

unions representing airline employees is reported in Table 3, while the response of trade unions representing ATCOs is reported in Table 4.

The majority of respondents considered voluntary early retirement and educational leave as policies that might be implemented at any time. The majority of the policies listed, however, were considered acceptable only as a short-term or crisis response. For airline employees, recruitment freeze, non-renewal of temporary contracts and pay freeze had been widely implemented.

A previous study has shown that a significant number of the human resource policies listed, such as compulsory redundancy and unpaid holiday leave, were deemed unacceptable.<sup>23</sup> Despite vehement opposition in the previous study and in this one, these policies have been extensively used by airline management.

**Table 3. Implementation of, and trade union response to, human resource policies at airlines (percentage)**

Policy	Implementation rate	Acceptable under normal circumstances	Only acceptable as a short term /crisis measure	Unacceptable under any circumstances
Recruitment freeze	80	16	59	8
Voluntary early retirement	43	36	34	3
Voluntary redundancy	57	26	41	10
Compulsory redundancy	38	2	15	54
Voluntary furlough	31	21	38	10
Compulsory furlough	16	3	30	38
Unpaid holiday leave	43	16	28	36
Short-time working	39	5	59	15
Shorter working week	25	7	56	10
Fewer shifts per month	33	7	54	15
Part-time working	36	23	39	10
Work-sharing	20	16	38	15
Probationary staff not transferred to full time contracts	44	7	33	33
Non-renewal of temporary contracts	57	15	48	20
Reduced training	33	5	28	43
Educational leave	25	33	18	13
Pay freeze	51	3	44	33
Forgo holiday pay	7	3	8	57
Forgo bonus pay	18	8	23	34
Pay cut (management)	33			
Pay cut (staff)	26			
Pay cut		0	20	61

N.B.: these data reflect the omission of response and so the percentages for the acceptability of the policies do not sum to 100.

<sup>23</sup> See Turnbull, P., and Harvey, G. (2001), *The Impact of 11 September in the Civil Aviation Industry: Social and Labour Effects*, Working Paper No. 182, Geneva: International Labour Office.

Due to the critical import of training to the safe operation and technological evolution at ANSPs, no respondent considered the policy of reduced training to be acceptable under normal circumstances, whereas more than two thirds deemed this policy to be unacceptable under any circumstances.

**Table 4. Implementation of, and trade union response to, human resource policies at ANSPs (percentage)**

Policy	Implementation rate	Acceptable under normal circumstances	Only acceptable as a short term /crisis measure	Unacceptable under any circumstances
Recruitment freeze	24	5	38	5
Voluntary early retirement	14	29	14	0
Voluntary redundancy	0	10	24	5
Compulsory redundancy	0	0	5	38
Voluntary furlough	10	19	19	5
Compulsory furlough	5	0	14	29
Unpaid holiday leave	19	5	14	24
Short-time working	5	14	19	10
Shorter working week	0	14	24	5
Fewer shifts per month	5	10	24	10
Part-time working	10	24	14	5
Work-sharing	0	14	24	5
Probationary staff not transferred to full time contracts	10	5	24	14
Non-renewal of temporary contracts	24	19	14	10
Reduced training	38	0	14	29
Educational leave	5	14	14	5
Pay freeze	29	0	24	19
Forgo holiday pay	5	0	5	33
Forgo bonus pay	19	0	29	14
Pay cut (management)	19			
Pay cut (staff)	14			
Pay cut		0	0	43

N.B. these data reflect the omission of response and so the percentages for the acceptability of the policies do not sum to 100.

The human resource policies discussed thus far relate primarily to company-level decisions, although given that many flag carriers are publicly owned these policies will often involve government input (e.g., financial support for early retirement programmes and voluntary severance packages or partial assistance for short-time working). Unions were therefore asked about the policies they believe national governments should pursue to support the civil aviation industry during the current crisis. A summary of the results appears in Table 5.

Mirroring responses to the survey of aviation trade unions after the 2001 industry crisis, there was strong support for funding for retraining programmes, less so for financial compensation for loss of business/traffic. A US union official quoted in

the previous study explained the attitude in this way: “The airlines demanded privatization and deregulation in the 1980s. They should not now be turning to the Government for financial assistance”.<sup>24</sup>

Once again, the promotion of mergers, acquisitions and consolidation received very little support (although far fewer respondents disagreed with the policy) as these issues are closely associated with questions of public interest and public services.

**Table 5. Government policies preferred by unions (percentage of respondent unions)**

Policy	Disagree	Neither disagree nor agree	Agree
Contribution to pension funds for early retirement	13	16	56
Funding for severance pay	13	26	48
Low cost loans to civil aviation employees	24	22	43
Payments to partially cover short time working	18	23	44
Payments to fully cover short time working	18	24	39
Extending unemployment benefits	13	16	59
Funding for medical/health insurance	11	12	65
Funding for retraining programmes	5	13	72
Financial compensation to airlines for loss of traffic	31	28	27
Financial compensation to airports for loss of business	33	29	23
Financial compensation to other companies (e.g. air traffic services, catering, aircraft manufacturers, etc.)	28	28	29
Financial support to airlines/airports for improved security	16	21	52
Relaxation of foreign ownership rules	33	27	22
Protect services to remote communities	6	39	37
Promote mergers/take-overs/consolidation	23	35	28
Initiatives to promote social dialogue	5	10	76
Funding compensation towards maintaining employment	6	10	56

As they did in 2001, initiatives to promote social dialogue elicited the strongest trade union support. This is evidence of airlines engaging in extensive and meaningful dialogue with unions in order to restructure in a socially responsible fashion, and unions evidently regard government initiatives in this area as vitally important. IATA claims that the scale of the crisis has eclipsed that of 2001. Unions clearly see the need for legislative intervention requiring management to engage labour in restructuring deliberations and policy decisions.

## **5. The differential impact of the crisis on men and women**

The most common response regarding any differential impact based on gender was that human resource policies were applied equally, as indicated in Table 6. However, it should be noted that airline management indicates the groups hardest

<sup>24</sup> Interview quote from Turnbull, P., and Harvey, G. (2001), *The Impact of 11 September in the Civil Aviation Industry: Social and Labour Effects*, Working Paper No. 182, Geneva: International Labour Office.

hit by restructuring policies in response to the crisis have been cabin crew (and to a lesser extent customer service staff). These occupations are heavily populated by female workers, e.g., they comprised 80 per cent of the total US flight attendant workforce in 2001. Whereas the human resource policies might not be intentionally discriminatory, restructuring policies may yet be having a more detrimental impact on female workers in civil aviation than on male workers.

**Table 6. Differential impact of restructuring on men and women**

Policy	Affected men more than women	Affected women more than men	Applied equally
Recruitment freeze	2	2	96
Voluntary early retirement	3	3	94
Voluntary redundancy	6	6	88
Compulsory redundancy	13	8	79
Voluntary furlough	8	4	88
Compulsory furlough	13	6	81
Unpaid holiday leave	3	3	94
Short-time working	8	0	92
Shorter working week	5	5	90
Fewer shifts per month	4	0	96
Part-time working	10	10	80
Work-sharing	6	12	82
Probationary staff not transferred to full time contracts	11	3	86
Non-renewal of temporary contracts	18	0	82
Reduced training	0	4	96
Educational leave	0	5	95
Pay freeze	0	0	100
Forgo holiday pay	0	0	100
Forgo bonus pay	0	6	94
Pay cut	6	0	94

## 6. Conclusions

A previous study concluded that the impact of 9/11 on working and employment conditions in civil aviation had “been immediate, significant but also extremely varied.” This summary encapsulates the impact of the financial crisis. Once again, the response of companies in the industry has ranged from the immediate and unilateral to the considered and consultative, with several airlines, particularly in the US, moving quickly to reduce headcount while others have engaged workers in the restructuring process in order to arrive at a more innovative and socially acceptable strategy. There is clear evidence that social dialogue is an effective and preferred means to achieving a feasible, successful and acceptable business model for the current aviation climate.







# **The Impact of the Financial Crisis on Civil Aviation**

Research into the impact of the financial crisis on civil aviation has been commissioned by the International Labour Office and conducted by a research team based at Cardiff University and Swansea University. Please participate in this study by completing the following questionnaire survey.

Please answer all questions by clicking on the relevant box. If you make a mistake, e.g., by clicking on the wrong box, click on the box a second time to remove the cross.

To include typed information, please click on the appropriate grey box and type your response. This will expand to accommodate any length of response.

What is the name of your organization?

In which country are you based?

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If you are agreeable to further contact with regards to this study please include your name and contact telephone number/email address:

1. Which of the following policies has been introduced at your organization in response to the current financial crisis? Please click on all that apply.

Policy	
Recruitment freeze	<input type="checkbox"/>
Voluntary early retirement	<input type="checkbox"/>
Voluntary redundancy	<input type="checkbox"/>
Compulsory redundancy	<input type="checkbox"/>
Voluntary furlough	<input type="checkbox"/>
Compulsory furlough	<input type="checkbox"/>
Unpaid holiday/leave	<input type="checkbox"/>
Short-time working	<input type="checkbox"/>
Shorter working week	<input type="checkbox"/>
Fewer shifts per month	<input type="checkbox"/>
Part time working	<input type="checkbox"/>
Work sharing	<input type="checkbox"/>
Probationary staff not transferred to full time contracts	<input type="checkbox"/>
Non-renewal of temporary contracts	<input type="checkbox"/>
Reduced training	<input type="checkbox"/>
Educational leave	<input type="checkbox"/>
Pay freeze	<input type="checkbox"/>
Forgo holiday pay	<input type="checkbox"/>
Forgo bonus pay	<input type="checkbox"/>
Pay cut – management	<input type="checkbox"/>
Pay cut – other staff	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>

Further comments:

2. How has the current crisis affected employees at your organization in terms of job losses, introduction of more flexible work practices, and other changes to terms and conditions of employment? By clicking on the relevant box, please report the impact of the crisis on a scale of 1 to 5, where 1 indicates a limited or marginal impact and 5 indicates an extensive or severe impact. Please click on n/a if your organization does not employ the employee group.

Policy	n/a	1	2	3	4	5
Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Flight crew	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cabin crew	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ground handling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Check-in staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing/strategy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Air traffic control	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Catering	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cleaning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fuelling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Administration/HR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. Please consider the policies in the list below and, for each ***that has been introduced at your organization***, indicate by clicking on the appropriate box whether the policy was introduced as a result of collective agreement; or whether it is a policy that was based on a legal provision; or whether it was introduced as a result of some other arrangement (e.g., initiative by management).

Policy	Measures determined by collective agreement	Measures based on legal provision	Other arrangement
Recruitment freeze	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Voluntary early retirement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Voluntary redundancy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Compulsory redundancy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Voluntary furlough	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Compulsory furlough	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Unpaid holiday/leave	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Short-time working	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shorter working week	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fewer shifts per month	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Part time working	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work sharing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Probationary staff not transferred to full time contracts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Non-renewal of temporary contracts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reduced training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Educational leave	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pay freeze	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Forgo holiday pay	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Forgo bonus pay	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pay cut	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other measures (please specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Further comments:

4. What policies, if any, should national government pursue to support the civil aviation industry during the current crisis? Consider the following policies and tick the appropriate response, where SD = strongly disagree (i.e., government should not intervene), D = disagree, N = neither disagree nor agree, A = agree (i.e., that government should offer support), and SA = strongly agree.

Policy	SD	D	N	A	SA
Contribution to pension funds for early retirement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Funding for severance pay	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Low cost loans to civil aviation employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Payments to partially cover short time working	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Payments to fully cover short time working	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Extending unemployment benefits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Funding for medical/health insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Funding for retraining programmes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial compensation to airlines for loss of traffic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial compensation to airports for loss of business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial compensation to other companies (e.g., air traffic services, catering, aircraft manufacturers, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial support to airlines/airports for improved security	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Relaxation of foreign ownership rules	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Protect services to remote communities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Promote mergers/take-overs/consolidation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Initiatives to promote social dialogue	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Further comments:

**Many thanks for your cooperation.**



# The Impact of the Financial Crisis

## on Civil Aviation

Research into the impact of the financial crisis on civil aviation has been commissioned by the International Labour Office and conducted by a research team based at Cardiff University and Swansea University with the support of the International Transport Workers Federation. Please participate in this study by completing the following questionnaire survey.

Please answer all questions by clicking on the relevant box. If you make a mistake and wish to remove a cross from a box, click on the box a second time to remove the cross. You are able to click on as many or as few boxes as is appropriate.

To include typed information, please click on the appropriate grey box and type your response. This will expand to accommodate any length of response.

Please save the document, complete it, resave after completing it and return it to [g.harvey@swansea.ac.uk](mailto:g.harvey@swansea.ac.uk).

What is the name of your union?

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In which country are you based?



Which of the following policies has been introduced by aviation companies in which you have members in response to the current financial crisis? Please click on all that apply.

Policy	International/ major airline	Domestic/ regional airline	Low cost/ charter airline	Airports	Catering	Ground handling	Maintenance	ATC	OTHER
Recruitment freeze	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Voluntary early retirement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Voluntary redundancy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Compulsory redundancy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Voluntary furlough	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Compulsory furlough	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Unpaid holiday/leave	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Short-time working	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shorter working week	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fewer shifts per month	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Part time working	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work sharing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Probationary staff not transferred to full time contracts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Non-renewal of temporary contracts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reduced training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Educational leave	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pay freeze	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Forgo holiday pay	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Forgo bonus pay	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pay cut – management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pay cut – other staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Further comments:

Which groups have been affected by the following policies introduced by aviation companies in which you have members in response to the current financial crisis? Please click on all that apply.

Policy	Cabin crew	Flight crew	Administration	Check-in staff	Customer services	Catering/cleaning	Baggage handling	Air traffic control	Other
Recruitment freeze	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Voluntary early retirement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Voluntary redundancy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Compulsory redundancy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Voluntary furlough	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Compulsory furlough	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Unpaid holiday/leave	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Short-time working	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shorter working week	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fewer shifts per month	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Part time working	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work sharing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Probationary staff not transferred to full time contracts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Non-renewal of temporary contracts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reduced training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Educational leave	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pay freeze	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Forgo holiday pay	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Forgo bonus pay	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pay cut – management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pay cut – other staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Further comments:

Have the policies introduced by aviation companies since the onset of the financial crisis affected men more than women, women more than men, or both equally? Please click on the appropriate box.

Policy	Affected men more than women	Affected women more than men	Applied equally
Recruitment freeze	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Voluntary early retirement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Voluntary redundancy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Compulsory redundancy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Voluntary furlough	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Compulsory furlough	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Unpaid holiday/leave	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Short-time working	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shorter working week	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fewer shifts per month	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Part time working	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work sharing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Probationary staff not transferred to full time contracts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Non-renewal of temporary contracts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reduced training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Educational leave	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pay freeze	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Forgo holiday pay	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Forgo bonus pay	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pay cut	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Further comments:

How acceptable to your members are the different policies listed below? Please consider whether the policy in question would be accepted under normal operating conditions, would only be acceptable as a short term response to the current crisis, or is *unacceptable* under any circumstances. Please click on the appropriate box.

Policy	Acceptable under normal circumstances	Only acceptable as a short term measure	Unacceptable under any circumstances
Recruitment freeze	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Voluntary early retirement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Voluntary redundancy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Compulsory redundancy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Voluntary furlough	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Compulsory furlough	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Unpaid holiday/leave	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Short-time working	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shorter working week	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fewer shifts per month	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Part time working	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work sharing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Probationary staff not transferred to full time contracts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Non-renewal of temporary contracts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reduced training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Educational leave	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pay freeze	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Forgo holiday pay	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Forgo bonus pay	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pay cut	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Further comments:

What policies should national government pursue to support employment in the civil aviation industry during the current crisis? Consider the following policies and tick the appropriate response, where SD = strongly disagree, D = disagree, N = neither disagree nor agree, A = agree, and SA = strongly agree.

Policy	SD	D	N	A	SA
Contribution to pension funds for early retirement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Funding for severance pay	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Low cost loans to civil aviation employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Payments to partially cover short time working	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Payments to fully cover short time working	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Extending unemployment benefits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Funding for medical/health insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Funding for retraining programmes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial compensation to airlines for loss of traffic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial compensation to airports for loss of business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial compensation to other companies (e.g., air traffic services, catering, aircraft manufacturers, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial support to airlines/airports for improved security	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Relaxation of foreign ownership rules	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Protect services to remote communities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Promote mergers/take-overs/consolidation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Initiatives to promote social dialogue	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Funding compensation towards maintaining employment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Further comments:

**Many thanks for your cooperation.**