



**TRANSFER**

Turning the ATM sector into a successful  
Example of replicable social dialogue practices

# NATIONAL REPORT

**ITALY**



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## Introduction

The air transport sector serves as a vital pillar of the Italian economy, acting as a primary engine for GDP growth and a fundamental driver of employment. Beyond its economic contribution, the sector is essential for ensuring national territorial cohesion—linking peripheral regions and islands with the mainland—and maintaining Italy’s global connectivity for tourism and international trade. The Italian aviation ecosystem is highly complex, encompassing scheduled and charter passenger services, cargo logistics, aerospace manufacturing, and airport management. These operations are supported by essential air navigation services provided by ENAV S.p.A. and the Italian Air Force. The infrastructure is organized around major intercontinental hubs, such as Rome Fiumicino and Milan Malpensa, supported by a dense network of regional airports.

### Current Market Context

Following the unprecedented disruption of the Covid-19 pandemic, the sector has demonstrated remarkable resilience. By 2024, passenger volumes and cargo performance exceeded 2019 levels, signaling a full recovery. However, this growth occurs within a volatile environment characterized by fluctuating energy costs, stringent new environmental regulations, and intense competition from low-cost carriers, which now command approximately 63% of the domestic passenger market.

### Recent Trends and Key Challenges

The sector is currently navigating a period of profound transformation, driven by four primary trends:

1. **Environmental Sustainability:** Adhering to ambitious EU decarbonization targets.
2. **Digitalization:** The integration of AI and advanced technologies in ATM (Air Traffic Management) and ground operations.
3. **Resilience:** Strengthening systems against geopolitical and health-related crises.
4. **Business Model Redefinition:** Constant restructuring of industrial relations and corporate hierarchies.

### Industrial and Social Dimensions

Despite the positive traffic data, the sector faces significant structural challenges. These include a shortage of qualified personnel, the risk of "social dumping" from foreign carriers, and the complexities of managing long outsourcing chains.

This report provides a comprehensive analysis of the sector’s performance in 2024 and 2025, examines the current state of industrial relations, and explores the effectiveness of worker participation models. By analyzing data from both Trade Union and Employer perspectives, the document aims to

identify the "communication gaps" and cultural barriers that must be addressed to align the Italian air transport system with the highest European standards of operational synergy and social dialogue.

## Section 1

### **Brief Description of the National Air Transport Sector**

The air transport sector in Italy represents a strategic component of the national transport system and economy, providing a significant contribution to GDP and to direct, indirect, and induced employment, particularly in metropolitan areas, tourism hubs, and island regions. Air transport ensures the country's connectivity with the rest of Europe and the world, as well as internal territorial cohesion, especially towards peripheral regions and the major and minor islands.

In Italy, primary services include scheduled and charter passenger transport, cargo transport, aeronautical construction and maintenance services, airport management, and ground handling services. Additionally, it encompasses air navigation services managed by both the designated national provider (ENAV S.p.A.) and the Air Force within the spaces and airports under its jurisdiction. The system is organized around several large hub airports and a network of regional airports that ensure national, European, and intercontinental connections.

Following the significant impact of the Covid-19 pandemic on traffic volumes, there has been a progressive recovery in passenger numbers and a steady performance in the cargo segment, despite a context of high demand volatility. The framework remains influenced by energy costs, the evolution of environmental regulations, and competition between legacy and low-cost carriers, which have significantly expanded their presence in Italy.

Recent trends are characterized by:

- Increasing attention to environmental sustainability and emission reduction.
- Digitalization of processes (ticketing, operations management, security, ATM).
- Strengthening of resilience measures regarding health and geopolitical crises.
- Ongoing restructuring processes and redefinition of business models, impacting corporate organization and industrial relations.

The corporate structure features a national reference carrier, numerous low-cost airlines, and foreign carriers operating in the Italian market, alongside specialized cargo operators. On the airport side, the sector consists of managers of large airports with public and private participation, regional airport managers, and a plurality of handling and technical service companies operating under a competitive regime.

Key challenges include:

- Achieving decarbonization targets set at the European level.
- The need to adapt infrastructure, airport capacity, and ATM.
- A shortage of qualified personnel in key roles and strong competitive pressure on costs.
- Management of outsourcing and subcontracting chains.
- Prevention of social dumping and maintenance of high operational safety and service quality standards

## 1.1 Data Analysis and Performance (2024 Actuals - 2025 Trends)

### 1.1.1 Traffic Statistics: Passengers, Movements, and Cargo

Traffic During 2025, air transport in Italy consolidated its growth trajectory, stabilizing at volumes consistently higher than the pre-Covid period. Key consolidated indicators released by both ENAC (the Italian NSA) and ISTAT (the Italian Institute of Statistics) showed a full recovery compared to 2019 as early as 2024:

	<b>Actual 2024</b>	<b>Variation vs 2023</b>	<b>Variation vs 2029</b>
<b>Total passengers</b>	<b>218.716.150</b>	<b>+ 11%</b>	<b>+13%</b>
<b>Aircraft movements</b>	<b>1.732.522</b>	<b>+ 7%</b>	<b>+ 5%</b>
<b>Cargo</b>	<b>1.216.246 t</b>	<b>+ 14%</b>	<b>+14 %</b>

### 1.1.2 Principal Airport Hubs: Performance Ranking

The top 5 airports by passenger volume in 2024 were:

- **Roma-Fiumicino: 48,5 mln (International and intercontinental hub);**
- **Milano-Malpensa: 28,7 mln (Core airport for cargo and long haul);**
- **Bergamo-Orio al Serio: 17,3 mln (Main "low-cost" base);**
- **Napoli Capodichino: 12,6 mln;**
- **Catania Fontanarossa: 12,3 mln.**
- 

The top 5 airports by cargo traffic in 2024 were:

- **Milano-Malpensa: 731.000 t;**
- **Roma-Fiumicino: 271.000 t;**
- **Venezia Tessera: 54.000 t;**
- **Bologna Borgo Panigale: 45.000 t;**

- **Brescia Montichiari: 23.000 t.**

### 1.1.3 Market Share: Legacy vs. Low-Cost Carriers

An analysis of the total traffic data for carriers operating flights to and/or from airports located within Italian territory in 2024 reveals that the top five airlines accounted for a combined passenger share of 59.4% (an increase of 1.4% compared to 2023). Furthermore, a breakdown of total traffic data by carrier type highlights that the market is driven by the so-called 'Point-to-Point' model typical of low-cost carriers, with these airlines accounting for approximately 63% of total passenger volume.

Compagnia	Passeggeri 2024	% su totale	Variazione su 2023
<b>Ryanair</b>	57.770.000	31,7 %	+ 10,6 %
<b>Ita</b>	18.090.000	9,9 %	+ 17,8 %
<b>Easyjet Europe</b>	13.727.000	7,5 %	+ 5,2 %
<b>Wizz Air Malta</b>	13.668.000	7,5 %	+ 62,6 %
<b>Vueling Airlines</b>	5.111.000	2,8 %	+ 0,6 %

## 1.2 Socio-Economic Impact Analysis of Air Transport in Italy

The air transport sector represents a strategic pillar for the country's national system, acting not only as mobility infrastructure but as a genuine engine for economic development and social cohesion. The impact generated on the national economy is structured across various dimensions, quantifiable through its contribution to the Gross Domestic Product (GDP) and employment levels.

### 1.2.1 Direct Impact and Value Added

According to IATA (International Air Transport Association) data for the 2023 fiscal year, the "direct" component of the sector — which includes airlines, airport management companies, Air Navigation Service Providers (ANSPs), and the aerospace manufacturing industry — employs approximately 261,700 professionals. This core segment generates an estimated Gross Value Added (GVA) of €25.2 billion, accounting for 1.2% of the national GDP.

### 1.2.2 The Extended Ecosystem and the Multiplier Effect

The sector's influence extends far beyond its immediate operational boundaries, activating a complex supply chain and fueling the spending of the workers involved (indirect and induced impact). When considering the entire aviation ecosystem, the total contribution to the Italian economy rises to approximately €97.7 billion, supporting a workforce of 1.1 million units.

Incoming tourism facilitated by air travel plays a decisive role:

- Contribution to GDP: Spending by foreign visitors arriving by air generates an impact of €26.2 billion.
- Employment: The tourism sector linked to air flows guarantees the employment of 357,100 workers.
- Local Consumption: It is estimated that the contribution of international tourists in terms of purchasing local goods and services exceeds €52.1 billion annually, providing essential liquidity to local businesses.

### **1.2.3 Strategic Positioning within the European Context**

Italy's significance emerges clearly when comparing national statistics with the aggregate European Union data provided by ATAG (Air Transport Action Group). ATAG—an international non-profit association representing the interests of the entire value chain (from airframe and engine manufacturers like Airbus, Boeing, and Rolls-Royce, to industry associations such as ACI and CANSO, as well as the business aviation and leasing sectors)—highlights that Italy plays a leading role in the continental network. Accounting for approximately 12.5% of the total economic value produced by the sector across the entire EU, the Italian airport and industrial system proves to be an essential asset for the competitiveness and integration of the European Single Market.

### **1.2.4 2025 Trends**

An analysis of aircraft movements and passenger data for 2025—which have not yet been officially released in their final form—shows a further increase in both passenger volume and cargo tonnage. Rome Fiumicino Airport alone has practically matched, within the first eleven months of the year, its total passenger traffic figure from 2024; for the first time since it opened, the airport is set to exceed the threshold of 50 million annual passengers. A similar performance is expected for Milan Malpensa Airport, which is projected to surpass the 30 million annual passenger mark.

## **1.3 Labor Conditions and Industrial Relations in the Sector**

### **1.3.1 Workforce Structure**

The workforce of the air transport sector in Italy is composed of permanent employees, fixed-term contracts, agency work (outsourced labor), and, in certain areas, forms of collaboration or service outsourcing involving personnel formally employed by third-party companies. The prevalence of non-standard contracts is particularly significant in high-competition segments, such as ground handling and certain airport services.

The primary professional categories encompass virtually every type of expertise involved in the construction, management, and operation of aircraft, as well as air navigation service personnel—including Air Traffic Controllers (ATCOs) and related technical support roles. The distribution of these categories reflects the relative weight of airlines, airport operators, Air Navigation Service Providers (ANSPs), and contracting firms.

International labor mobility, while marginal in percentage terms, is a structural element of the system: the Italian market includes workers from other EU Member States and third countries, particularly in technical, operational, and service roles. Furthermore, there are cases of workers employed in Italy by airlines with bases registered in other countries, which may have implications for the applicable legislation and the coordination of social security systems.

### **1.3.2 General Assessment of Working Conditions**

Working conditions in the Italian air transport sector are characterized by irregular hours, shift work, and night or holiday shifts, reflecting the continuous operations of the airport system and airlines. Remuneration, shift and flight allowances, and corporate welfare systems vary significantly across professional categories, operators, and the specific collective bargaining agreements applied.

Compared to other strategic sectors of the Italian economy, air transport involves high levels of individual and collective responsibility, a strict regulatory framework, and stringent safety and security standards, all of which impact work organization and continuous training. However, critical issues remain regarding workload management, fatigue prevention, and work-life balance, particularly for operational staff.

Key critical factors include flight crew and air traffic control fatigue, the impact of night shifts and complex rotations, exposure to operational stress, and the necessity of maintaining high standards of operational safety. Furthermore, increasing digitalization introduces new challenges in cybersecurity and data protection, requiring specific skills and constant updating.

### **1.3.3 General Framework of Industrial Relations**

Industrial relations in the Italian air transport sector are characterized by marked fragmentation, involving a plurality of trade unions differentiated by professional category (pilots, cabin and ground crew, air traffic controllers, etc.) and organizational orientation. On the employers' side, representation is divided among associations of carriers, airport operators, ground handling companies, and specialized logistics operators.

Collective bargaining is structured across multiple levels: from national sector or area-wide contracts (CCNL) to supplementary corporate agreements, up to

group or network-level agreements. Although the contractual coverage rate remains high in large enterprises and state-owned operators, the system appears more fragile within the procurement segments and smaller-scale operations.

Negotiating dynamics are complicated by the coexistence of historically established confederated unions and a diverse range of independent unions (*sindacati autonomi*). Within this context, FAST CONFISAL has established itself as an aggregating body, serving as a focal point for numerous independent entities. While these entities preserve their specific identities, they have found a unified projection within this representative "galaxy." This ability to systematize previously isolated entities ensures a level of strategic coordination that is fundamental to the management of industrial conflicts.

#### **1.3.4 Sectoral Contracts and the Regulation of the Right to Strike**

The Italian model of industrial relations in the air transport sector is founded upon a complex ecosystem of national laws, technical regulations, and collective bargaining agreements. Although this framework excludes workers not directly employed in production—who are subject to other contracts, such as the Metalworking and Mechanical Engineering Agreement (*Contratto della Metalmeccanica*)—it remains the primary regulatory reference for the vast majority of employees in the sector.

##### **1.3.4.1 Collective Bargaining (CCNL)**

The pillar of the system is the National Collective Labor Agreement (CCNL) for Air Transport, signed by employers' associations and the sectoral Confederated Trade Unions (*Filt-Cgil, Fit-Cisl, Uiltrasporti, and Ugl Trasporto Aereo*). The contract is structured into a "General Section", with a three-year validity (from January 1, 2025, to December 31, 2027), and several sector-specific sections (Operators, Handling, Carriers, and Flight Assistance).

These specific sections detail the particular regulations that reflect the unique characteristics of each professional profile. By way of example, the airport operators' sector includes new salary increases effective as of this coming July 1st.

##### **1.3.4.2 Regulation of the Right to Strike**

In implementation of Article 40 of the Italian Constitution, Law 146/1990 regulates the right to strike within essential public services, balancing the exercise of this right with the fundamental rights of citizens (life, health, freedom of movement, assistance, education, and communication).

The law establishes the Guarantee Commission (Commissione di Garanzia), an independent administrative authority tasked with ensuring compliance with the law and issuing specific regulations binding on all parties. These regulations detail the procedures for initiating labor disputes, as well as the proclamation and execution of strikes.

Regarding the air transport sector, Law 146/1990 imposes rigorous obligations, including:

- **Cooling-off and Conciliation:** The obligation to initiate a mandatory preliminary consultation phase once a dispute is opened.
- **Notice and Information:** The proclamation of a strike must adhere to specific timeframes to ensure users are informed in a timely manner.
- **Prohibition of the "Announcement Effect":** The ban on canceling a strike close to the scheduled date (except for justified reasons) to prevent unnecessary disruption.
- **Protected Time Slots:** Service must be guaranteed during the "protection windows" of 07:00–10:00 and 18:00–21:00.

Finally, ENAC (the Italian Civil Aviation Authority) plays a key role in identifying specific flights that—for reasons of safety, healthcare assistance, or public order—must be operated even during strike actions.

### **1.3.5 Current Trends and Challenges**

The sector currently faces risks related to social dumping and so-called "rule shopping," practiced by foreign carriers operating from bases registered in countries with lower taxation or reduced labor protections. Excessive outsourcing and repeated sub-contracting have further fragmented working conditions within the same airport sites.

Managing transitions—ranging from corporate restructuring to digitalization—requires constant dialogue between social partners, supported by social safety nets and retraining programs. The shortage of specialized professional figures remains a critical issue, driven by the difficulty of retaining talent in a highly competitive international market. Finally, the emergence of flexible work models or those mediated by digital platforms poses new challenges in terms of representation and minimum protections, necessitating common standards at the European level.

### **1.4 National System of Worker Participation (in Aviation)**

In Italy, the legislative framework for worker participation finds its core principle in Article 39 of the Italian Constitution, which establishes the freedom of trade union organization and lays the foundation for the recognition of the validity of collective bargaining agreements.

On this premise are based the regulations governing union representation, the rights to information and consultation, and, in certain cases, the presence of representative bodies at the corporate or production unit level.

Larger enterprises and major multinational groups active in air transport are subject to specific obligations regarding information and consultation. The formal mechanisms for participation (structures such as company-level union representations, safety committees, and joint bodies) are closely linked to the collective bargaining system, as the worker representatives involved in information and consultation processes are often the same individuals who sit at the negotiating tables. This fosters integration between the daily management of industrial relations and participation in strategic decision-making.

European Directives on information and consultation, as well as on European Works Councils (EWC), have had a significant impact on the Italian air transport sector, given the presence of multinational groups operating within the national territory. In large groups and international alliances, these European councils serve as a forum for discussion on restructuring, network strategies, industrial plans, and major investments, with effects that extend to Italian facilities and bases.

## **1.5 Worker Participation in Practice within the Air Transport Sector**

Formal information and consultation procedures have a relatively high coverage rate among major airlines, leading airport operators, and the national air navigation service provider, all of which possess established representative structures. Conversely, in ground handling companies and outsourced services, the presence of structured representative bodies is more inconsistent, largely depending on company size and production stability.

In terms of practical effectiveness, participation mechanisms are most successful when information is provided in a timely manner, consultation periods are sufficient, and social partners can engage in a genuine dialogue regarding the available options. In several instances, participation has helped mitigate conflict during restructuring processes, the introduction of new technologies, or significant organizational changes.

The primary issues addressed during the sector's information and consultation processes include:

- Reorganization plans and the outsourcing or insourcing of services.
- Modifications to working hours and shift patterns.
- Health and safety measures.
- The introduction of new technological systems and infrastructure investment plans.

The actual impact of these discussions on final decisions varies, ranging from purely formal participation to scenarios where workers' representatives' observations are actively integrated into the adopted solutions.

Historically, there have been positive examples of participatory crisis management. In these cases, dialogue between management and labor representatives led to agreements on social safety nets, training, and retraining, thereby avoiding more extensive layoffs. On the other hand, there remain instances where consultation is perceived as tardy or merely procedural, resulting in industrial action, mobilization, and litigation.

Compared to other Italian sectors, such as manufacturing or financial services, air transport is characterized by a strong transnational dimension and the concentration of activities within a few major hubs and numerous regional sites. This complexity makes building uniform participation models difficult, yet it also fosters advanced representative experiences at specific airports and within certain groups.

The main obstacles to the full implementation and optimal functioning of participation include:

- Workforce fragmentation among multiple employers within the same airport.
- Geographical dispersion and high personnel mobility.
- The complexity of the international regulatory framework.
- Managerial resistance toward consultations perceived as restrictive.

Furthermore, the rapid pace of market changes and restructuring processes can further limit the opportunities for substantive dialogue.

## Section 2

### Participation Analysis

Following the expert meetings, the questionnaire developed during the project discussion phases was administered in English to a selected sample of stakeholders, consisting of representatives from trade unions and employers' organizations. The objective of the survey was to collect qualitative and quantitative data on a voluntary basis.

### Survey Results

The analysis of the responses reveals a marked polarization in the behavior of the two target groups: Trade Union representatives demonstrated systematic proactivity, providing timely and decisive answers. In contrast, widespread resistance to completing the survey was observed among Employer representatives. This reluctance appeared to be "cultural" in nature, persisting despite guarantees of absolute anonymity and confidentiality provided during the briefing phase. This attitude, while critical for research purposes, is not unexpected. It is a direct reflection of an industrial relations model still anchored in 20th-century paradigms typical of the national system. In this context, the employer side struggles to perceive labor representation as a strategic partner for development. Instead, a vision of the union as a brake on innovation and an ideological antagonist prevails. It is perceived as a conservative component relative to free private initiative, leading to a desire to minimize the sharing of long-term objectives and visions. While this adversarial approach finds an explanation (though not a justification) in the historical legacy of other productive sectors, it proves anachronistic and particularly counterproductive in the Services and Transport sector, where efficiency depends on operational continuity and synergy across all levels. The persistence of ideological barriers is aggravated by a management class that often approaches industrial relations on purely theoretical or academic grounds, lacking the direct field experience necessary to understand that human capital is an asset, not an obstacle. To ensure a granular understanding of the observed phenomena, data analysis was structured through a segmentation of respondents into two distinct clusters (Trade Union Representation and Employer Side), followed by a comparative analysis of the findings. This approach allows for the isolation of perceptual divergences and the identification of potential points of convergence or structural friction.

## 2.2 The "Trade Union Representatives" Cluster

The first segment analyzed concerns workers' representatives. The collected data outlines a peculiar and, in some ways, unexpected demographic profile compared to the traditional canons of national unionism. Contrary to the stereotyped image of an older union representation, the questionnaires highlight an equitable distribution across different age groups, with significant active participation from representatives under 34 and a notable presence of delegates in the under-25 bracket. This "union youth" does not appear to be accidental but is rather the direct consequence of the occupational dynamics intrinsic to the air transport sector—particularly in ground handling and ancillary on-board services—where staff turnover is extremely high. The often seasonal or precarious nature of many operational roles accelerates the entry of new recruits into the aeronautical and airport labor market. High rotation ensures that even younger workers quickly find themselves managing collective demands, assuming representative roles to address high-pressure work environments with often fragmented protections. The presence of young representatives introduces a different sensitivity toward digitalization, flexibility, and ancillary services—segments where technical skills and adaptability are predominant. However, while high turnover guarantees a constant generational turnover in representation, it also poses a challenge in terms of "historical memory" regarding industrial relations, making the union training of young delegates a critical element for the sector's stability. The analysis of educational qualifications reveals further asymmetries: while the majority of those under 34 hold a high school diploma and only a minority are graduates, there is substantial parity between diploma and degree holders among those over 34. Equally interesting is the segmentation by role, showing that among flight crew, the percentage of graduates is significantly higher than among ground handlers. In the author's opinion, the disparity in educational background between contiguous work environments (ground vs. board) may represent an obstacle to the unity of union representation, creating cultural gaps in a supply chain that is, by its nature, intimately connected. Following the qualitative profiling of the Workers' Representation cluster—an analysis that will be mirrored for the Employer cluster—the contents of the questionnaire were examined. The analysis reveals highly solid data: nearly all respondents demonstrate full awareness of the Italian regulatory framework. There is a widely shared recognition of the Constitution (Art. 39) and ordinary laws as fundamental pillars for the protection of workers' rights and their organizations. Another determining factor for this awareness is the presence of specific legislation governing the constitutional right to strike in essential public services (Law 146/90 and subsequent

amendments), which obliges those entering union representation to quickly learn the national legislative system.

Regarding the existence of a "Code of Practice" within the company to formalize relations between social partners, only a small minority (about 10%) reported its existence. However, the vast majority believe that a joint signing of such a code—by elevating the dignity of union representation—would be an added value in the dynamics of relations and could be a point to include in future contract renewal platforms. Since union representation in air transport has always been highly fragmented, the questionnaire responses suggest a desire for "recognition" that currently remains unfulfilled. The evaluation of social partners' behavior across all examined fields was relatively homogeneous. The average score settled between 5/10 and 6/10, indicating a social dialogue that is not perfect but substantially effective. Communication received a median rating, with unanimous agreement on the need for improvement. Nearly half of the respondents identified the quality of communication and the lack of mutual trust as the most perceived problems. Regarding workers' information rights, there appears to be a lack of clarity regarding the legal basis of these rights. A significant minority of respondents reported not knowing the source of such rights. This suggests that Trade Union Organizations should initiate a widespread information campaign among members regarding the national and EU regulatory framework of recognized rights.

Another important theme was the existence (or lack thereof) of tools to ensure compliance with signed agreements. Often, conflict arises from the company's failure to respect these agreements. Respondents signaled that internal management tools for this type of conflict are very rare or absent. The proclamation of industrial action often represents a "plea to be heard" within the company. This highlights a demand for proactive activity from management, which currently appears to be merely reactive. Despite awareness of external mediation bodies, their use in Italy remains limited. This resistance stems from uncertainty regarding the binding nature of decisions and doubts about the actual impartiality and autonomy of such bodies. Consequently, workers' representatives tend to place greater trust in the ordinary judicial system.

### **2.3 The "Employer Representatives" Cluster**

As previously noted, initial participation from employer representatives was less punctual. It was necessary to supplement data collection with direct telephone interviews to reach the minimum sample required for statistical validity. However, there is an almost total overlap between the answers

provided via the online form and those collected verbally. The analysis highlights a marked homogeneity in the profile of the respondents. Most individuals in mid-to-high-level industrial relations roles in air transport are over 45 and hold a university degree. Consistent with this profile, their knowledge of regulatory sources is very thorough.

**Industrial Relations and Codes of Practice:** Although nearly the entire sample noted the absence of a formalized Code of Practice, opinions on its utility are divided. About half evaluate its adoption positively, while the other half consider it superfluous or even inappropriate.

**The Communication Gap:** A particularly significant data point concerns the perception of corporate performance: employer representatives evaluate their own ability to listen to the counterpart positively. This orientation, diametrically opposed to that of the workers' representatives, highlights a critical communication problem. Most respondents hope for an improvement in information exchange, meaning not just the transfer of data, but a real sharing of strategic objectives.

**Conflict and Conciliation Tools:** The final section shows common ground regarding the failure to respect agreements. Law 146/90 is perceived as the "lesser evil" or the only possible model for dialogue during crises. Finally, mediation and conciliation tools remain largely unused. Employers express a widespread distrust toward these means, often preferring the timelines of ordinary legislation, which can be strategically favorable to companies.

## **2.4 Comparative Analysis and Final Considerations**

The comparative analysis highlights significant similarities. In Italy, there is clear awareness among all actors regarding the protection of the right to free union association. Conversely, knowledge of EU regulations regarding workers' information rights is lacking. There is also a lack of familiarity with Alternative Dispute Resolution (ADR) tools, which are widespread in Anglo-Saxon systems.

The proposal derived from the project's "toolbox" focuses decisively on these tools as the fastest and most effective way to settle conflicts. In conclusion, the research highlights a paradox: despite high education and technical competence among representatives, a cultural distance persists regarding non-adversarial participation and mediation tools.

The "communication gap" reflects the need for a transition toward a more mature model of relations where information becomes strategic sharing. The systematic adoption of ADRs and the formalization of Codes of Practice should not be perceived as a surrender of prerogatives, but as investments in the operational stability of the sector. The future success of the industry will

depend on the ability to transform conflict from a bureaucratic obstacle into an opportunity for constructive dialogue, aligning Italian practices with the best European standards.

## Section 3

### Recommendations for Improving Industrial Relations and Participation

Based on the socio-economic analysis and the findings of the stakeholder survey, the following recommendations are proposed to modernize the Italian air transport industrial relations model. The goal is to transition from a reactive, adversarial system to a proactive, participatory framework aligned with European best practices.

#### 3.1 Enhancing Mutual Trust and Communication

The survey highlighted a significant "communication gap" between employer and union representatives. To bridge this divide, the following measures are recommended:

- **Implementation of "Codes of Practice":** Formalize bilateral protocols that define the rules of engagement, frequency of meetings, and information-sharing standards. This would elevate the dignity of social dialogue and reduce ideological friction.
- **Strategic Transparency:** Move beyond the mere fulfillment of legal information obligations. Management should adopt a policy of "Strategic Sharing," involving unions in discussions regarding long-term industrial plans and technological transitions before final decisions are made.

#### 3.2 Bridging the Knowledge Gap on EU Regulations

Given the lack of awareness regarding European-level information and consultation rights, a targeted educational initiative is necessary:

- **Integrated Training Programs:** Launch joint training seminars for both union delegates and HR managers focusing on EU Directives and the functioning of European Works Councils (EWC).
- **Dissemination of Information Rights:** Trade unions should prioritize internal campaigns to educate members—particularly younger delegates—on the legal basis of their consultation rights at both national and continental levels.

#### 3.3 Adoption of Alternative Dispute Resolution (ADR)

To mitigate the high rate of industrial action and the reliance on slow judicial processes, the sector should embrace non-adversarial conflict management:

- **Promotion of Mediation and Conciliation:** Develop internal company or sector-wide mediation bodies that are perceived as truly impartial.

This requires a cultural shift away from the "all-or-nothing" litigation mindset.

- **Conflict Prevention Tools:** Institutionalize cooling-off periods and joint technical committees to resolve technical or contractual disputes before they escalate into formal proclamations of a strike.

### 3.4 Professionalization and Intergenerational Support

The "union youth" identified in the survey represents an opportunity for innovation, but also a risk regarding the loss of historical memory:

- **Mentorship and Knowledge Transfer:** Establish formal mentorship programs within unions to pair experienced representatives with younger delegates, ensuring the continuity of technical expertise.
- **Standardization of Educational Backgrounds:** Address the cultural divide between different professional categories (e.g., ground vs. flight crew) through cross-functional workshops to foster a unified vision of the aviation supply chain.

### 3.5 Addressing Market Fragmentation and Social Dumping

To protect the Italian air transport "ecosystem" from external pressures and internal fragmentation:

- **Harmonization of Standards:** Advocate for common European labor standards to prevent "rule shopping" and social dumping by carriers with foreign bases.
- **Regulation of Subcontracting:** Strengthen the oversight of the procurement chain in ground handling to ensure that outsourcing does not lead to a dilution of safety standards or a fragmentation of workers' representative rights.

### 3.6 Digitalization and the Human Element

As the sector moves toward total digitalization (ATM, ticketing, operations), industrial relations must evolve:

- **Participatory Innovation:** Include social partners in the design phase of new digital tools to manage the impact on work-life balance, cybersecurity, and data protection.
- **Reskilling and Upskilling:** Negotiate robust social safety nets and training funds specifically dedicated to workers whose roles are most impacted by automation and the green transition (decarbonization).

## Section 4

### Conclusions

Based on the report provided, the following conclusions summarize the research findings and the future outlook for the Italian air transport sector:

#### 4.1 Sector Recovery and Economic Significance

The Italian air transport sector has fully recovered from the Covid-19 crisis, surpassing 2019 levels with 218 million passengers in 2024 and sustained growth into 2025. Its economic footprint—1.2% of national GDP directly and up to 97.7 billion overall—underscores its role as a cornerstone of connectivity, tourism, and employment for 1.1 million workers.

#### 4.2 Structural Challenges and Market Volatility

Persistent headwinds include low-cost dominance (63% market share), personnel shortages, outsourcing complexities, and EU decarbonization mandates. These amplify risks like social dumping and fragmented industrial relations in a high-stakes, 24/7 operational environment.

#### 4.3 Industrial Relations and the Communication Gap

Surveys reveal a stark divide: unions seek proactive dialogue and EU-aligned tools, while employers prioritize autonomy, resulting in underused mediation and mutual distrust. This adversarial dynamic hampers resilience amid rapid digital and regulatory shifts.

#### 4.4 Path Forward

Implementing targeted reforms (detailed in Section 3)—from trust-building protocols to ADR adoption—will align Italy's model with European benchmarks, fostering synergy for sustainable growth. Stakeholders must prioritize these to transform challenges into competitive strengths by 2027 and beyond.



# TRANSFER

TuRning the Atm sector iNto a SuccesFuL  
Example of Replicable social dialogue practices



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