

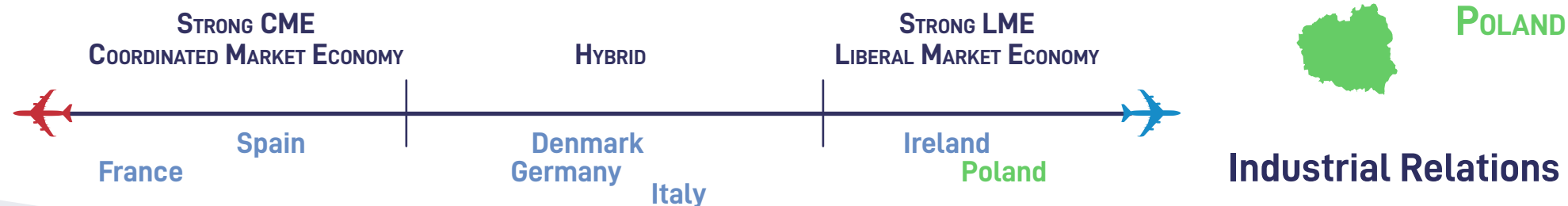


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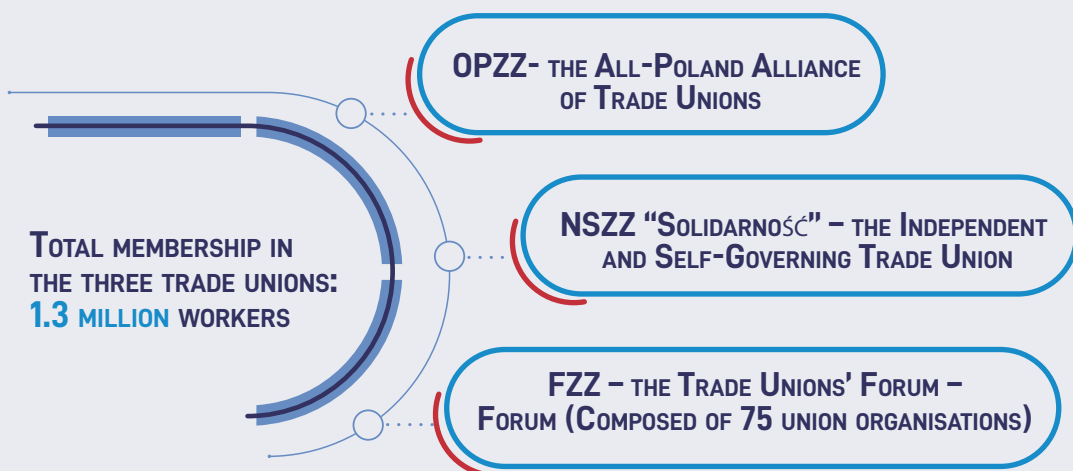
Varieties of Industrial Relations in Aviation Lockdown

ROLE OF STATE LEGISLATION IN INDUSTRIAL RELATION

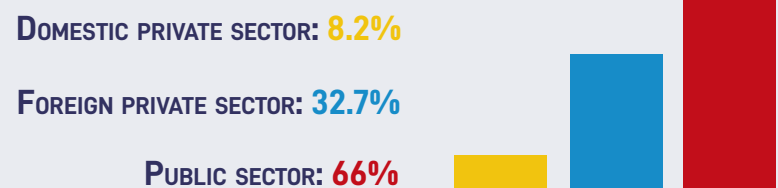


LABOUR UNION REPRESENTATION

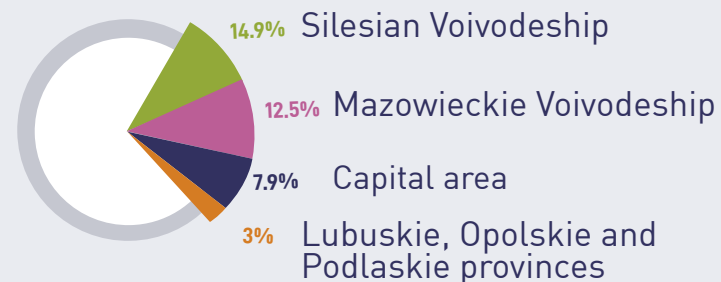
MAIN TRADE UNIONS



UNION DENSITY



UNION DENSITY BY PROVINCE



EMPLOYER REPRESENTATION

Main employer organisations
Confederación Española de Organizaciones Empresariales (CEOE) comprised of:



COLLECTIVE BARGAINING COVERAGE

WORKPLACE REPRESENTATION

Works Councils, in medium and large enterprises.



REGULATION OF INDUSTRIAL RELATIONS

23 MAY 1991

ACT ON TRADE UNIONS





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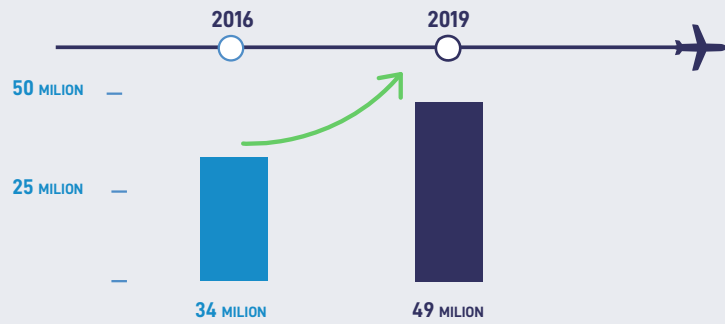
Varieties of Industrial Relations in Aviation Lockdown



Air Transport Sector

AIR TRANSPORT PRE-COVID

PASSENGER VOLUMES



AIRPORTS



WARSAW CHOPIN AIRPORT:
18.3 MILLION PASSENGERS IN 2019.



MODLIN: 3.1 MILLION PASSENGERS IN 2019



PRESENCE OF LOW-COST CARRIES: **2X** FROM 2010 - 2015

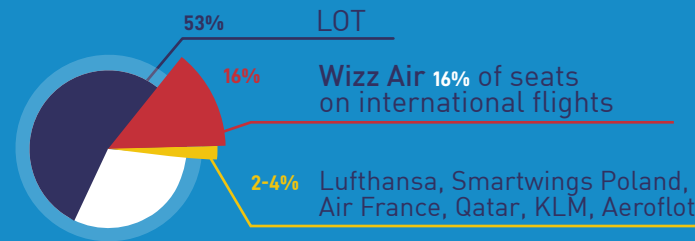
STATE SUBSIDIES

Sector is highly dependent on direct state subsidies

Total infrastructure investments by Polish Air Navigation Services Agency between 2015-2019: **€200 MILLION**

Flagship carrier, LOT Polish Airline, received **€215** from 2004 to 2020 in state aid, including a bail-out

MARKET SHARE BY LARGEST AIRLINE (% of seats on international flights)



INDUSTRIAL RELATIONS IN THE POLISH AIR TRANSPORT SECTOR

MULTI-STAKEHOLDER MODEL

Tripartite Industry Team for Air Transport and Airport Services established in 2016

COLLECTIVE BARGAINING COVERAGE



MAIN ACTORS THE STATE

69.3% PLL LOT - Polskie Linie Lotnicze "LOT" S.A. [LOT Polish Airlines] Polish national airline, established on 29 December 1928. (69.3% state-owned)

Polska Grupa Lotnicza - PGL [Polish Aviation Group]

Polska Agencja Żeglugi Powietrznej [Polish Air Navigation Services Agency]

Urząd Lotnictwa Cywilnego [Civil Aviation Authority]

Przedsiębiorstwo Państwowe „Porty Lotnicze” [“Polish Airports” State Enterprise]

UNIONS

Związek Zawodowy Naziemnego Personelu Lotniczego [Aircraft Maintenance Staff Trade Union]

Związek Zawodowy Pracowników Lotnictwa Cywilnego [Civil Aviation Workers' Union]

Związek Zawodowy Kontrolerów Ruchu Lotniczego [Trade Union of Air Traffic Controllers]

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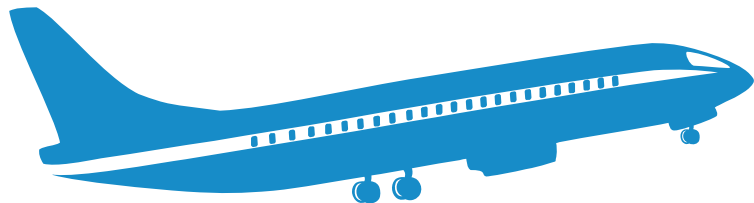
EMPLOYERS

ZWIĄZEK PRACODAWCÓW LOTNICTWA I DRONÓW
[Aviation and Drone Employers Association]

JOINT REPRESENTATION

Zespół Trójstronny ds. Transportu Lotniczego i Obsługi Lotniskowej

[The Tripartite Sectoral Team for Air Transport and Airport Services]





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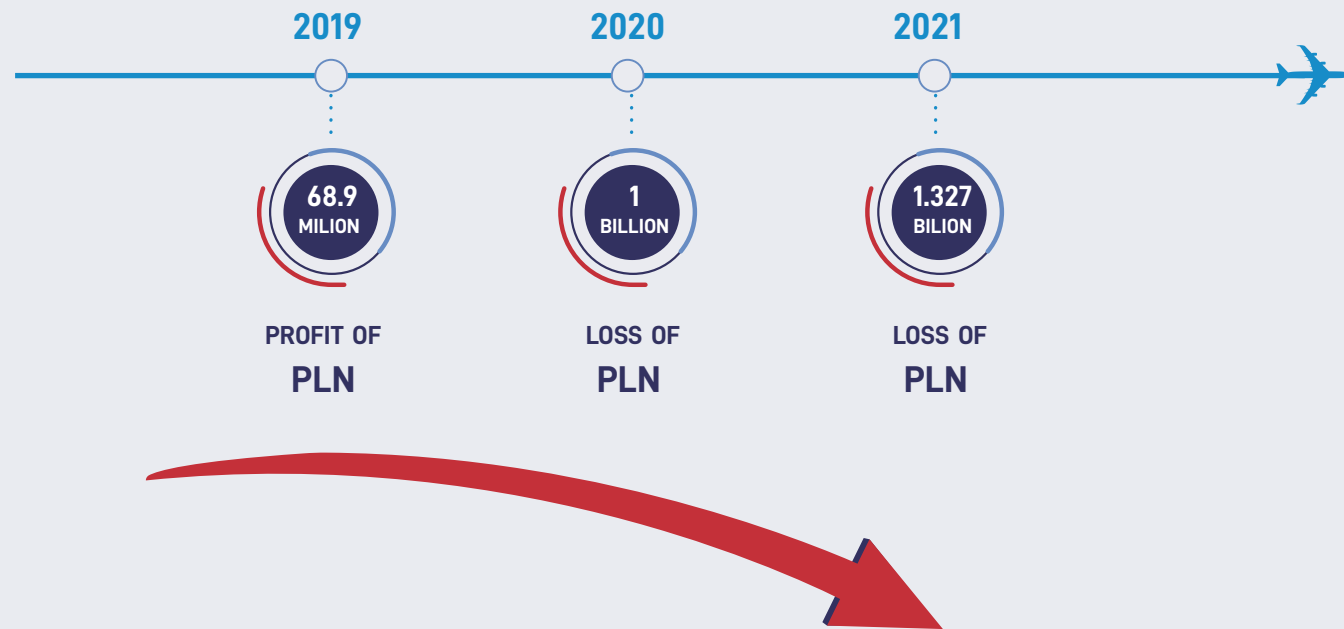


Impact of COVID-19

OVERALL

5. POLISH RESPONSE

First quarter of 2022 70% of activity with respect to first quarter 2020



No direct aid to the industry

KEY LEGISLATION

CRISIS SHIELD 4.013

ARTICLE 15GE SEC. 3

stipulated (**ARTICLE 15GE SEC. 3**) that the provisions of collective agreements or wage regulations were suspended during the period of an epidemic emergency in the event of a decrease in the employer's economic turnover



LOT (FLAGSHIP CARRIER)

FEB. 2021

270 employees laid off

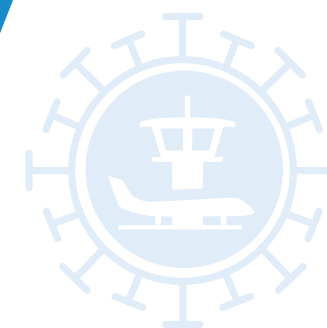
Temporary CBA to govern return to work of laid-off employees signed with unions, in effect **UNTIL 2024**

Increase in recruitment of pilots and cabin crew through "B2B," or freelance, contracts

POLISH AIR NAVIGATION SERVICES AGENCY (PAŻP)

Layoffs and pay reductions for Air Traffic Controllers jointly negotiated in response to pandemic

PAŻP attempted to make these changes permanent





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POLAND

Case Studies

AIR TRAFFIC CONTROLLERS (ATCS)

The Polish example of aviation sector collective bargaining

CONTEXT

- Total ATCs in Poland: 600
- Employed by: PAŻP (Polish Air Navigation Services Agency)
- Main source of revenue for PAŻP: Airline fees tied to # of flights

INDUSTRIAL RELATIONS MAIN ACTORS

- PAŻP
- Air Traffic Controllers' Unions
- Air Traffic Controllers
- Airlines
- Passengers

IMPACT OF COVID 19

- Revenues declined
- 2020 joint agreement reached to cut costs by:
 - Reducing staffing
 - Reducing wages by 1/3

RECOVERY (2021)

- 2021 PAŻP seeks to make 2020 cuts permanent and issues new terms to ATCs
- ATCs demand a return to pre-crisis wage and employment levels and refuse to accept new terms

- 2022 ATCs threaten collective abstention from work during peak summer travel period
 - Unions launch PR campaign to frame their demands in terms of safety
 - By shifting the narrative, Unions win public to their side

- 2022 agreement reached with ATCs
 - Collective action averted
 - Employment and wages restored for ATCs



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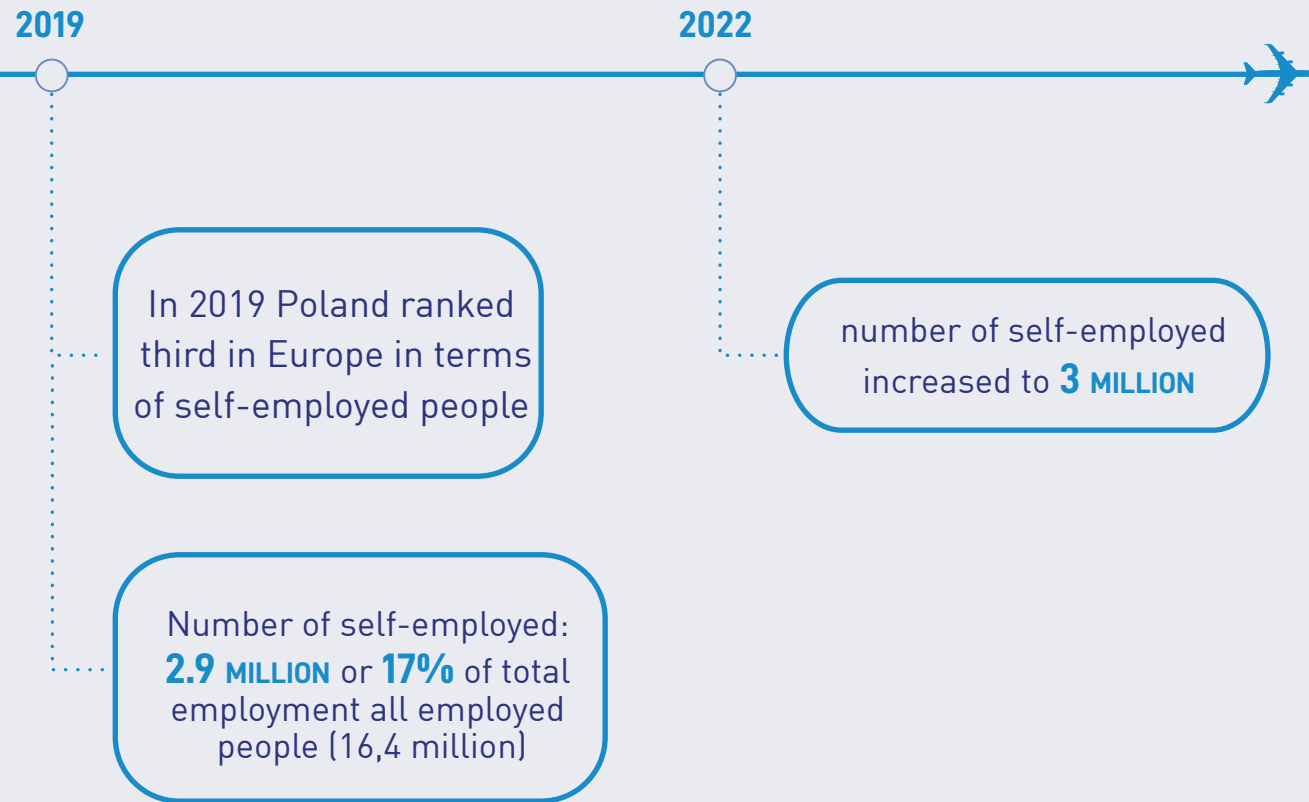


POLAND

Case Studies

IN BETWEEN THE MYTH AND FICTION OF SELF-EMPLOYMENT OF POLISH CABIN CREW

“B2B” SELF-EMPLOYMENT IN POLAND



SELF-EMPLOYMENT IN AVIATION

