

GLBAL PILOTS' SYMPOSIUM PANAMA CITY, PANAMA 2014

Connecting the World's Pilots

Moderated by Capt. Henk de Vries

Panel I Participants

- Capt. Martin Duffy, Ryanair IALPA Coordinator
- Capt. Jim Phillips, Director of International Affairs — Vereinigung Cockpit
- Michael Robbins, Managing Director,
 Government and Public Affairs Air Line Pilots Association, Int'l
- Moderator Assist Capt. Mike Pinho



Show of Hands...

What is the likelihood of the global aviation industry going the way of the U.S. maritime industry?

- This <u>will</u> happen to us
- This <u>might</u> happen to us
- This <u>probably will not</u> happen to us
- This will not happen to us



SWOT Analysis





SWOT Analysis – Weaknesses

- Business is global; social and labor laws are national
- Lack finances and organization to combat new threats
- Developing relationships with non-member pilot groups
- We develop strategic plans, but fail to implement them
- Failing to develop the next generation of pilot volunteers
- One country, many unions can provide an environment for lack of coordination on important issues
- Are we as inclusive as we can be?
- Lack of leadership, and coordination on global issues
- Internal politics prohibits success; resistant to change
- Puede llevar un caballo al agua pero no le puede hacer bebe

SWOT Analysis — Threats

- Globalization consolidation and mergers can negatively affect unity of purpose
- Without proper strategic planning we may become less relevant
- Limited possibilities for industrial action
- Race to bottom of terms and conditions
- Erosion of the piloting profession
 - "Just" safety culture under pressure
 - Undermining of commander's legal responsibility
 - Individual contracts



FOC — Clear and Present Danger?

- Norwegian Air International
 - ► Pilots on Singaporean contracts
 - ▶ BKK based
 - ▶ Irish AOC / HQ
 - ▶ Branding = "Norwegian"
- Ryanair
 - Circumvent paying local taxes
 - Prevent (local) safety oversight
 Aircraft never to land in Ireland
- Afriqiyah
 - Circumvent EU blacklist
 - ► El iso 5A



SWOT Analysis — Strengths

- Pilots are organized and
 - ► Have key attributes to make a difference
 - Have proven that unified pilot groups produce results
 - Are acutely aware of "the problems" facing our profession
 - ► Have financial and volunteer resources
 - Utilize and share subject matter expertise throughout the profession
- Setting and maintaining realistic expectations



SWOT Analysis — Opportunities

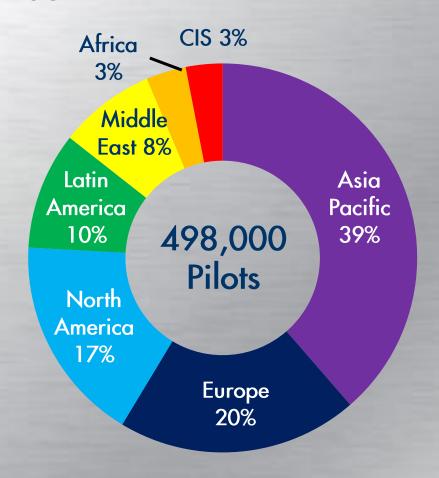
- Impending global pilot shortage
- Outreach to young/new pilots
- Outreach to "unorganized" pilots
- Consider changes to our organizational structures at IFALPA MAs and alliances
- Raise our profile through outreach to policymakers, media, other unions, other aviation stakeholders
- CLA bargaining opportunities



Will Continued Air Traffic Growth Lead to a Pilot Shortage?

Pilot Hiring Needed for Fleet Growth and Retirements 2013 – 2032

Region	Pilots
Asia Pacific	192,300
Europe	99,700
North America	85,700
Latin America	48,600
Middle East	40,000
Africa	16,500
CIS	15,200



Source: 2013 Boeing Pilot & Technician Outlook

What Can We Do...?

There is no silver bullet

No simple, immediate and effortless solution to the problem





What are your views on the challenges for the future of the profession concerning the proliferation of individual contracts vs. collective agreements for pilots?



How can we make ourselves more relevant to policymakers, regulators, industry, the media, and the public?



Do you foresee a change in the way pilots worldwide are organized?

If so, what would that change be?

Should we make a change to our current structure?

Why is pilot unity so important?

Would pilots prefer to make their own choices and be individually responsible for their own careers?



One of the strategic takeaways from last year was to "build unity of purpose" within the profession to better enable success.

Within the context of today's discussion, do you think that concept is possible? If so, why?

Consolidation and mergers continue to be a major challenge.

How well have we handled these corporate transactions in our industry?

What can we do better?



Your Turn...

- Discussions...
- Thoughts...
- Ideas...
- Best practices...



Questions?



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