

At A Glance

Average Annual Wage Increase

	Nov	Dec
	%	%
Private Sector	0.9	1.8
Public Sector	2.6	2.4
All Settlements	1.5	2.0

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Agreements Settled in December

In December, 18 collective agreements were ratified, each covering 200 or more employees. These agreements covered 9,798 employees, 73% of whom were in the private sector. By industry, the majority of employees were in communications.

The overall average annual increase in base wage rates in December was 2%, an increase from 1.5% reported in the previous month. In the public sector, eight agreements were settled for an average annual wage increase of 2.4%, a slight decrease from 2.6% in the last month. In the private sector, 10 agreements were settled, providing an average annual wage increase of 1.8%, compared to 0.9% in November.

Major settlements in December included an agreement between Bell Canada and the Communications, Energy and Paperworkers Union of Canada (CEP). The four-year settlement, covering 4,190 Ontario-based employees, provided an average annual wage increase of 1.9%. Serco Des Inc (Drivetest) reached a settlement with the United Steelworkers, representing 560 employees. The 48-month agreement provides an average annual wage increase of 1.5%. The London Transit Commission and the Amalgamated Transit Union reached a 45-month agreement, providing 410 employees with an average annual wage increase of 3.2%.

Wage Settlements - December

Average Annual Increase, Current Month

	Agmts	Empls	Increase %
Private Sector	10	7,136	1.8
Public Sector	8	2,662	2.4
All Settlements	18	9,798	2.0

Average Annual Increase, Current Three Years

	2009 %	2008 %	2007 %
Private Sector	1.3	2.0	2.9
Public Sector	2.4	3.1	3.1
All Settlements	2.1	2.7	3.0

Average Annual Increase by Industry, Current Month

	Agmts	Empls	Increase %
Manufacturing	4	1,312	1.1
Trade & Finance	1	217	2.0
Transportation, Communications & Utilities	4	5,173	2.1
Public Administration	3	1,154	2.1
Health & Social Services	4	1,098	2.4
Other Services	2	844	1.7
All Settlements	18	9,798	2.0

Average Annual Increase by Industry, Current Three Years

	2009 %	2008 %	2007 %
Primary	3.4	4.1	2.7
Manufacturing	0.7	1.2	2.4
Construction	2.5	3.4	3.2
Trade & Finance	1.6	2.1	1.9
Transportation, Communications & Utilities	1.8	2.9	3.2
Public Administration	2.0	3.1	2.9
Education & Related Services	3.0	3.1	3.4
Health & Social Services	2.4	3.0	3.0
Other Services	2.2	2.6	3.0
All Settlements	2.1	2.7	3.0

December Settlements

Employer	Union	Average Annual Wage Incr. %	1st 12 months %	Approx. Number of Empls. (Ontario)	Duration of Wage Schedule (months)	Agmt. Expiry Date
Manufacturing						
Autoliv Electronics Canada	Machinists	1.7 ²	0.0	242	36	2013-01-11
Horizon Plastics	Food & Commercial Workers	0.5	0.0	225	48	2013-11-01
Maple Leaf Foods	Food & Commercial Workers	1.5	0.0	220	48	2013-08-31
Molson Coors Canada	Brewery & General Workers	1.0 ^{1,2}	1.0	625	84	2016-12-31
Trade & Finance						
HDS Retail North America (Pearson Intl Airport)	Teamsters	2.0	2.1	217	36	2012-10-31
Transportation, Communications & Utilities						
Bell Canada (clerical/associated)	Communications Energy Paperworkers	1.9	1.5	4,190	48	2013-05-31
Independent Electricity System Operator	Energy Prof Society	2.7	2.6	310	36	2012-12-31
Jazz Air LP (Air Canada Jazz) (customer service)	Cdn Auto Workers	1.7 ¹	2.0	263	42	2013-01-13
London Transit Commission	Amalgamated Transit (ATU-Intl)	3.2	3.0	410	45	2013-03-31
Public Administration						
City of Peterborough (inside)	Cdn Public Empls	2.1	2.0	221	36	2012-12-31
Treasury Board of Canada (Foreign Service)	Foreign Service Officers	1.7	2.3	643	48	2011-06-30
City of Windsor (Firefighters)	Ont Firefighters	3.2 ³	3.2	290	48	2009-12-31
Health & Social Services						
Municipality of Chatham-Kent (Riverview Gardens)(service/RPN)	Cdn Auto Workers	2.0	2.0	335	36	2011-12-31
Hotel-Dieu Grace Hospital (office)	Cdn Auto Workers	2.0	2.0	212	36	2012-03-31
Hotel-Dieu Grace Hospital (service)	Cdn Auto Workers	2.0	2.0	248	36	2012-03-31
Rygiel Supports for Community Living	Cdn Public Empls	3.4	3.8	303	24	2011-03-31
Other Services						
Ontario Public Service Employees Union	Ont Public Service Staff	2.2	2.0	284	36	2012-06-30
Serco Des Inc (Drivetest)	United Steelworkers (USW)	1.5	1.0	560	48	2013-03-01

1 Wage restructuring

2 Two-tier wage schedule

3 Interim Arbitration Award

Selected Settlement Summaries

(Based on available information)

Bell Canada and Communications, Energy and Paperworkers Union of Canada (4,190 Ontario-based clerical and associated employees)

a four-year renewal agreement, effective June 1, 2009, expiring May 31, 2013

- wage increases of 1.5% on November 1, 2009, and 2.1% in each of the second, third and fourth years for eligible employees
- modifications to various leaves
- improvements to job security provisions
- letters of intent regarding job evaluation, reclassification, and wage protection
- creation of a joint committee to provide recommendations regarding post retirement benefits and flex dollars
- introduction of the CEP Humanity Fund via the Employee giving fund

Molson Coors Canada and Canadian Union of Brewery and General Workers, Local 325 (625 employees)

a seven-year renewal agreement, effective January 1, 2010, expiring December 31, 2016

- wage increases of 1% in each year; wage restructuring and implementation of a graduated wage progression scale for specific classifications effective January 1, 2010
- modifications to provisions related to regular hours of employment, overtime, and joint and survivor pension plan
- improvements to health and welfare benefits
- increased meal allowance
- letters of agreement and intent regarding World Class Manufacturing (WCM), retirement incentives, leaves of absence, and compressed work week

Fourth Quarter 2009 Summary

During the fourth quarter of 2009, 93 collective agreements were ratified, each covering 200 or more Ontario-based employees. These agreements covered 71,337 employees, 57% of whom were in the public sector. By industry, the majority of employees affected were in health and social services (25,605), followed by retail trade (11,632), education and related services (6,375), and communications (5,548).

Wage Trends - Last Three Years
Average Annual Increase in Base Wage Rates and Consumer Price Index

Sector and CPI	2007				2008				2009			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Private Sector	2.6	3.0	3.3	1.9	2.0	1.7	2.5	2.6	2.0	1.2	1.2	1.2
Public Sector	3.0	3.2	3.4	2.9	3.1	3.0	3.0	3.1	2.4	2.6	2.2	2.3
All Settlements	2.9	3.0	3.4	2.7	2.9	2.0	2.9	3.0	2.4	2.2	1.9	1.8
Consumer Price Index	1.3	1.8	2.0	2.3	1.5	1.9	3.6	2.0	1.6	0.3	-1.1	0.8

Wage Adjustments

Fourth quarter settlements provided an overall average annual wage increase of 1.8%, a slight decrease from 1.9% in the previous quarter. In the public sector, the average annual wage increase was 2.3%, a slight increase from 2.2% in the third quarter. The private sector remained unchanged from the third quarter at 1.2%. During the fourth quarter of 2009, average annual wage increases were affected by settlements in health and social services (2.2%), retail trade (1.4%), education and related services (2.8%), and communications (1.9%).

In the fourth quarter of 2009, approximately 40% of all employees received average annual wage increases ranging from 2% to 2.9%, compared to 38% who received average annual wage increases ranging from 1% to 1.9%. In the public sector, 64% of employees were covered by agreements with average annual wage increases ranging from 2% to 2.9%, compared to 9% of private sector employees. The majority of private sector employees (59%) received average annual wage increases ranging from 1% to 1.9%.

Of the total number of employees, 39% were covered by four-year agreements. Approximately 52% of public sector employees and 22% of private sector employees were covered by four-year agreements, compared to 22% of public sector employees and 17% of private sector employees covered by three-year agreements. Approximately 36% of private sector employees, and 22% of public sector employees were covered by 24-month agreements. In manufacturing, 61% of employees were covered by one-year agreements, compared to less than 1% of non-manufacturing employees. Approximately 44% of non-manufacturing employees and 14% of manufacturing employees were covered by four-year agreements.

**Table 1: Average Annual Increases in Base Wage Rates by Sector
(public and private), Fourth Quarter 2008 to Fourth Quarter 2009**

	All Agreements			Agreements with COLA			Agreements without COLA		
	<i>Agmts</i>	<i>Empls</i>	<i>%</i>	<i>Agmts</i>	<i>Empls</i>	<i>%</i>	<i>Agmts</i>	<i>Empls</i>	<i>%</i>
Fourth Quarter 2008									
Private Sector	21	27,545	2.6	8	3,088	1.8	13	24,457	2.8
Public Sector	191	160,413	3.1	1	918	2.6	190	159,495	3.1
All agreements	212	187,958	3.0	9	4,006	2.0	203	183,952	3.0
First Quarter 2009									
Private Sector	21	8,234	2.0	1	275	2.0	20	7,959	2.0
Public Sector	83	154,641	2.4	2	1,265	3.0	81	153,376	2.4
All agreements	104	162,875	2.4	3	1,540	2.8	101	161,335	2.4
Second Quarter 2009									
Private Sector	43	55,780	1.2	8	22,735	0.4	35	33,045	1.9
Public Sector	94	134,124	2.6	2	7,705	3.0	92	126,419	2.5
All agreements	137	189,904	2.2	10	30,440	1.0	127	159,464	2.4
Third Quarter 2009									
Private Sector	28	25,783	1.2	7	6,442	1.0	21	19,341	1.2
Public Sector	35	62,278	2.2	-	-	-	35	62,278	2.2
All agreements	63	88,061	1.9	7	6,442	1.0	56	81,619	2.0
Fourth Quarter 2009									
Private Sector	24	30,666	1.2	3	7,926	0.1	21	22,740	1.6
Public Sector	69	40,671	2.3	1	1,358	1.9	68	39,313	2.3
All agreements	93	71,337	1.8	4	9,284	0.3	89	62,053	2.0

**Table 2: Average Annual Increases in Base Wage Rates by Sector
(manufacturing and non-manufacturing), Fourth Quarter 2008 to Fourth Quarter 2009**

	All Agreements			Agreements with COLA			Agreements without COLA		
	<i>Agmts</i>	<i>Empls</i>	<i>%</i>	<i>Agmts</i>	<i>Empls</i>	<i>%</i>	<i>Agmts</i>	<i>Empls</i>	<i>%</i>
Fourth Quarter 2008									
Manufacturing	12	3,985	1.1	6	2,031	1.2	6	1,954	1.0
Non-Manufacturing	199	173,973	3.0	3	1,975	2.8	196	171,998	3.1
Construction	1	10,000	3.4	-	-	-	1	10,000	3.4
All agreements	212	187,958	3.0	9	4,006	2.0	203	183,952	3.0
First Quarter 2009									
Manufacturing	13	4,024	1.7	1	275	2.0	12	3,749	1.7
Non-Manufacturing	91	158,851	2.4	2	1,265	3.0	89	157,586	2.4
All agreements	104	162,875	2.4	3	1,540	2.8	101	161,335	2.4
Second Quarter 2009									
Manufacturing	24	30,626	0.6	7	22,535	0.3	17	8,091	1.4
Non-Manufacturing	112	158,636	2.5	3	7,905	3.0	109	150,731	2.5
Construction	1	642	2.5	-	-	-	1	642	2.5
All agreements	137	189,904	2.2	10	30,440	1.0	127	159,464	2.4
Third Quarter 2009									
Manufacturing	11	5,611	0.5	6	4,086	-0.2	5	1,525	2.3
Non-Manufacturing	52	82,450	2.0	1	2,356	3.0	51	80,094	2.0
All agreements	63	88,061	1.9	7	6,442	1.0	56	81,619	2.0
Fourth Quarter 2009									
Manufacturing	13	11,827	0.5	2	7,276	0.0	11	4,551	1.3
Non-Manufacturing	80	59,510	2.1	2	2,008	1.6	78	57,502	2.1
All agreements	93	71,337	1.8	4	9,284	0.3	89	62,053	2.0

Table 3: Average Annual Increases in Base Wage Rates, Manufacturing, Fourth Quarter 2009

	All agreements			Agreements with COLA			Agreements without COLA		
	Agmts	Empls	%	Agmts	Empls	%	Agmts	Empls	%
	Food, Beverage	5	2,732	1.1	-	-	-	5	2,732
Rubber, Plastics	2	432	0.3	-	-	-	2	432	0.3
Transportation Equipment	4	7,802	0.1	2	7,276	0.0	2	526	1.7
Electrical Products	1	242	1.7	-	-	-	1	242	1.7
Chemicals	1	619	2.7	-	-	-	1	619	2.7
Total Manufacturing	13	11,827	0.5	2	7,276	0.0	11	4,551	1.3

Table 4: Average Annual Increases in Base Wage Rates, Non-Manufacturing, Fourth Quarter 2009

	All agreements			Agreements with COLA			Agreements without COLA		
	Agmts	Empls	%	Agmts	Empls	%	Agmts	Empls	%
	Transportation	5	3,897	2.4	1	650	1.0	4	3,247
Communications	2	5,548	1.9	1	1,358	1.9	1	4,190	1.9
Electric, Gas, Water	1	310	2.7	-	-	-	1	310	2.7
Retail Trade	4	11,632	1.4	-	-	-	4	11,632	1.4
Education & Related Services	3	6,375	2.8	-	-	-	3	6,375	2.8
Health & Social Services	57	25,605	2.2	-	-	-	57	25,605	2.2
Recreational Services	1	950	2.0	-	-	-	1	950	2.0
Other Services	2	844	1.7	-	-	-	2	844	1.7
Federal Government	2	3,443	1.7	-	-	-	2	3,443	1.7
Local Government	3	906	2.9	-	-	-	3	906	2.9
Total Non-Manufacturing	80	59,510	2.1	2	2,008	1.6	78	57,502	2.1

Table 5: Average Annual Increases in Base Wage Rates, All Industries, Fourth Quarter 2009

	All agreements			Agreements with COLA			Agreements without COLA		
	Agmts	Empls	%	Agmts	Empls	%	Agmts	Empls	%
	Manufacturing	13	11,827	0.5	2	7,276	0.0	11	4,551
Non-manufacturing	80	59,510	2.1	2	2,008	1.6	78	57,502	2.1
All Industries	93	71,337	1.8	4	9,284	0.3	89	62,053	2.0

Table 6: Average Annual Increases in Base Wage Rates by Duration and Sector, Fourth Quarter 2009

	All Agreements			Private Sector			Public Sector		
	<i>Agmts</i>	<i>Empls</i>	<i>%</i>	<i>Agmts</i>	<i>Empls</i>	<i>%</i>	<i>Agmts</i>	<i>Empls</i>	<i>%</i>
One-year agreements	3	7,607	0.3	2	7,207	0.0	1	400	5.8
Two-year agreements	19	19,768	2.1	2	10,950	1.4	17	8,818	2.8
Three-year agreements	23	14,264	2.1	10	5,163	1.4	13	9,101	2.4
Four-year agreements	46	27,715	2.0	9	6,721	1.8	37	20,994	2.0
Five-year agreements	1	1,358	1.9	-	-	-	1	1,358	1.9
Seven-year agreements	1	625	1.0	1	625	1.0	-	-	-
All Agreements	93	71,337	1.8	24	30,666	1.2	69	40,671	2.3

Table 7: Average Annual Increases in Base Wage Rates by Duration (Manufacturing and Non-Manufacturing), Fourth Quarter 2009

	Manufacturing			Non-manufacturing			Construction		
	<i>Agmts</i>	<i>Empls</i>	<i>%</i>	<i>Agmts</i>	<i>Empls</i>	<i>%</i>	<i>Agmts</i>	<i>Empls</i>	<i>%</i>
One-year agreements	2	7,207	0.0	1	400	5.8	-	-	-
Two-year agreements	-	-	-	19	19,768	2.1	-	-	-
Three-year agreements	4	2,287	1.1	19	11,977	2.3	-	-	-
Four-year agreements	6	1,708	1.7	40	26,007	2.0	-	-	-
Five-year agreements	-	-	-	1	1,358	1.9	-	-	-
Seven-year agreements	1	625	1.0	-	-	-	-	-	-
All Agreements	13	11,827	0.5	80	59,510	2.1	-	-	-

Negotiations

On average, private sector agreements were ratified within 3.8 months from the start of negotiations, compared to 8.7 months in the public sector.

Of all settlements reached during the fourth quarter of 2009, 11 agreements involving 16% of employees were negotiated directly by the parties, compared to 58 agreements, covering 64% of employees, settled in conciliation or mediation. The arbitration process settled 18 agreements, and six agreements were settled following work stoppages.

In the public sector, approximately 66% of employees reached settlements through conciliation or mediation, and 2% settled by direct bargaining. In the private sector, 62% of employees reached agreements through conciliation or mediation, compared to 33% who settled by direct bargaining.

Upcoming Bargaining

Major negotiations continuing into the first quarter of 2010 involve the federal government, municipalities, police services boards, hospitals, nursing homes and homes for the aged, universities and the College Compensation and Appointments Council (academic staff).

Major agreements expiring during the first quarter of 2010 will include hospitals, nursing homes and homes for the aged, community services, and the municipal sector.

Table 8: Duration of Negotiations, Fourth Quarter 2009

	Total		Private Sector		Public Sector	
	<i>Agmts</i>	<i>Empls</i>	<i>Agmts</i>	<i>Empls</i>	<i>Agmts</i>	<i>Empls</i>
1 – 3 months	15	22,532	13	22,091	2	441
4 – 6 months	15	11,411	8	3,562	7	7,849
7 – 9 months	56	29,219	3	5,013	53	24,206
10 – 12 months	2	1,693	-	-	2	1,693
13 months and over	5	6,482	-	-	5	6,482
Total	93	71,337	24	30,666	69	40,671

Table 9: Average Duration of Negotiations by Sector, Fourth Quarter 2009

Average Duration of Negotiations	
	<i>months</i>
Private sector	3.8
Public sector	8.7
Total	7.4

Table 10: Stage of Settlement by Sector, Fourth Quarter 2009

	Total		Private Sector		Public Sector	
	<i>Agmts</i>	<i>Empls</i>	<i>Agmts</i>	<i>Empls</i>	<i>Agmts</i>	<i>Empls</i>
Direct bargaining	11	11,211	8	10,214	3	997
Conciliation	11	8,137	5	5,614	6	2,523
Post-conciliation bargaining	3	1,103	-	-	3	1,103
Mediation	43	33,743	7	13,422	36	20,321
Post-mediation bargaining	1	2,800	-	-	1	2,800
Arbitration	18	7,298	1	310	17	6,988
Work stoppage	6	7,045	3	1,106	3	5,939
Total	93	71,337	24	30,666	69	40,671

Work Stoppages

During 2009, 64 work stoppages under Ontario jurisdiction were reported; the number of reported work stoppages in 2009 remained unchanged from 2008. Work stoppages in 2009 involved 42,573 employees and resulted in 1,550,730 person-days lost, compared to 19,118 employees and 281,770 person-days lost reported for 2008.

For 2009, 25 work stoppages were reported in the manufacturing sector, unchanged from 2008. The non-manufacturing sector reported 39 work stoppages during 2009, a slight increase from 38 in 2008. During 2009, 0.11% of the estimated working time in Ontario was lost due to work stoppages.

Table 11: Work Stoppages, 2008 and 2009

	2009	2008
Manufacturing	25	25
Non-manufacturing	39	38
Construction	-	1
All Industries	64	64

Table 12: Person-Days Lost, 2008 and 2009

	2009	2008
Manufacturing	317,270	122,280
Non-manufacturing	1,233,460	159,460
Construction	-	30
All Industries	1,550,730	281,770

As of December 31, 2009, 20 work stoppages, covering a total of 5,566 employees, were carried over to January 2010.
(Data are collected for all work stoppages involving two or more employees under Ontario jurisdiction.)

Table 13: Work Stoppages under Ontario Jurisdiction, 1988 to 2009

Year	Number of Work Stoppages	Number of Employees Involved	Number of Employees Per Work Stoppage	Number of Person-Days Lost	Number of Person-Days Lost Per Employee Involved	Average Duration of Work Stoppages (Days Out)	Person-Days Lost as % of Estimated Working Time
1988	180	62,082	345	1,362,150	21.9	35	0.12
1989	190	45,679	240	868,630	19.0	35	0.08
1990	218	81,022	372	2,957,640	36.5	43	0.26
1991	153	25,448	166	453,520	17.8	43	0.04
1992	121	38,160	315	577,710	15.1	39	0.05
1993	81	15,620	193	371,150	23.8	42	0.03
1994	130	25,456	196	488,320	19.2	34	0.05
1995	136	57,318	421	476,960	8.3	39	0.04
1996	135	216,917	1,607	1,914,900	8.8	39	0.16
1997	113	176,029	1,558	1,904,210	10.8	50	0.16
1998	156	69,411	445	1,060,990	15.3	38	0.09
1999	143	44,980	315	651,100	14.5	39	0.05
2000	146	55,267	379	649,730	11.8	39	0.05
2001	144	34,652	241	671,990	19.4	35	0.05
2002	117	66,572	569	1,510,580	22.7	40	0.11
2003	94	23,807	253	494,880	20.8	38	0.04
2004	99	20,952	212	486,840	23.2	37	0.03
2005	76	12,239	161	403,210	32.9	45	0.03
2006	70	30,240	432	394,600	13.0	48	0.03
2007	75	25,257	337	389,130	15.4	39	0.03
2008	64	19,118	299	281,770	14.7	48	0.02
2009*	64	42,573	665	1,550,730	36.4	72	0.11

* preliminary

Major Negotiations Underway

Employer	Union	Location	Approx. Number Empls.	Expiry Date
Federal Government	Various unions	Canada-wide	2,800	Various dates
Various Municipalities (excluding Police Services Boards)	Various unions	Various locations	18,700	Various dates
Police Services Boards	Police Associations	Various locations	10,200	Various dates
Hospitals	Various unions	Various locations	48,300	Various dates
Nursing Homes/Homes for the Aged	Various unions	Various locations	37,400	Various dates
Universities	Various unions	Various locations	2,180	Various dates
Vale Inco	USW	Sudbury	3,000	2009-05-31
College Compensation and Appointments Council (academic staff)	OPSEU	Province-wide	8,750	2009-08-31
Pulp and Paper	Various unions	Various locations	6,200	Various dates

As of December 31, 2009, there were 208 agreements, each covering 200 or more employees, that have expired and not been renewed.

Consumer Price Index (2002=100)*

	2006	2007	2008	2009	October 2009	November 2009	December 2009
Canada	2.0	2.1	2.4	0.3	0.1	1.0	1.3
Ontario	1.8	1.8	2.3	0.4	0.2	1.0	1.2
Toronto	1.6	1.9	2.4	0.5	0.3	0.8	0.8
Ottawa-Gatineau (Ont. part)	1.7	1.9	2.2	0.6	0.4	1.1	1.2
Thunder Bay	1.5	1.0	2.2	0.1	-0.6	0.1	0.3

* Percentage change from previous year
Source: Statistics Canada

Data for the months of March, June, September and December include quarterly information.

Information in this report is based on collective agreements covering 200 or more employees, a sample that represents 76% of unionized employees in Ontario. Wage data in this report are derived exclusively from information reported to Collective Bargaining Information Services. Data for the current month are preliminary. All percentage wage data are calculated on the base rate, weighted by the number of employees, and include cost-of-living adjustments (COLA) where applicable, calculated at projected rates of inflation. The increases do not necessarily reflect the average increase for each member of the bargaining unit.

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