

Portrait of Québec's Marine Industry Human Resources

- ▶ Summary of the sectorial study on marine industry human resources in Québec — November 2013

STUDY CONTEXT

This summary is taken from the sectorial study conducted between February and September 2013 by *Zins Beauchesne et associés* for the Human Resources Sectorial Committee of the Maritime Industry (CSMOIM). The information was gathered using three research methods: a survey of companies, a statistical and documentary compilation and discussion groups involving marine-sector workers.

BRIEF DESCRIPTION OF THE SECTOR

The marine sector covered by CSMOIM includes not only cargo and passenger transportation activities but also all port-related operations, administration and marine services.

Of the **13 222 direct jobs** identified in the sector, **37% involve navigating personnel** and **63% involve land-based marine personnel**.

The average annual tonnage handled in Québec ports is growing steadily—127 million tonnes in 2011 compared to 118 million tonnes in 2007. Of Québec's two dozen commercial ports, the busiest are Québec City, Montréal, Sept-Îles, Port-Cartier, Sorel and Baie-Comeau, the order varying from year to year. St. Lawrence ports are virtually all involved in transshipping dry and liquid bulk cargo. The Port of Montréal is the exception with a highly developed container traffic market niche.

Shipping companies registered in Canada must hire Canadian personnel. The study identified about 20 of them, specializing primarily in non-containerized cargo transportation. Companies carrying passengers (cruise ships and ferries) are much more numerous but, on average, much smaller.

COMPANIES

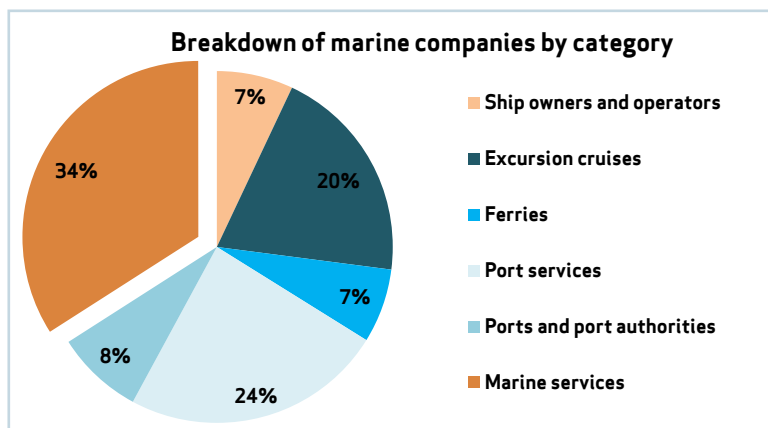
The sectorial study identified **366 companies** for Québec's marine sector as a whole, mainly in the marine and port services categories. For the purposes of the study, these 366 marine companies were divided into categories corresponding to their principal activity.

SHIP OPERATORS were subdivided into three groups.

- ▶ **Ship owners and operators:** companies specializing mainly in cargo transportation or operating service vessels such as tugboats, buoy tenders, research ships, etc.
- ▶ **Excursion cruises:** companies offering marine tourism services.
- ▶ **Ferries:** companies offering regular ferryboat services or serving various points along a passenger/cargo route.

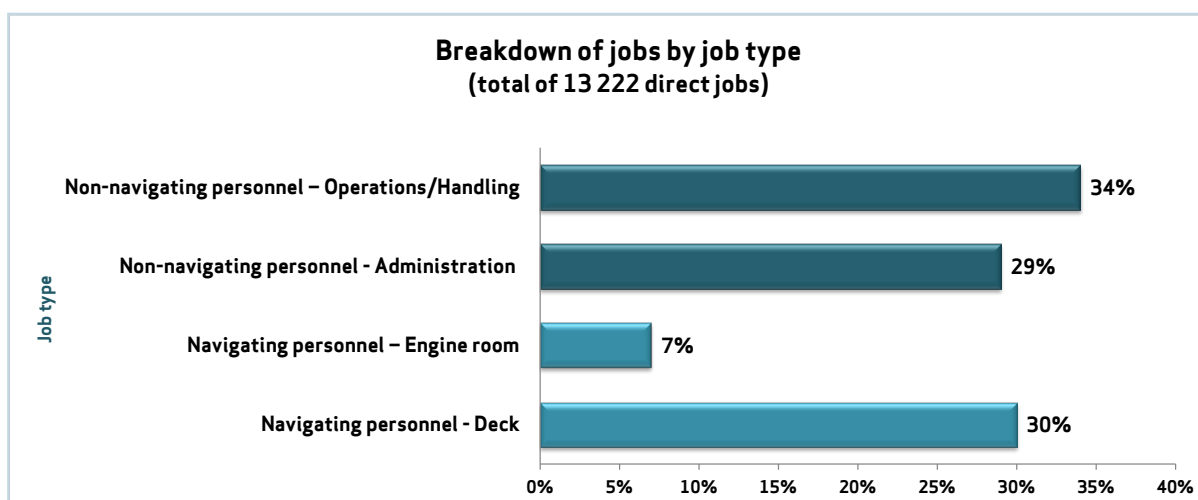
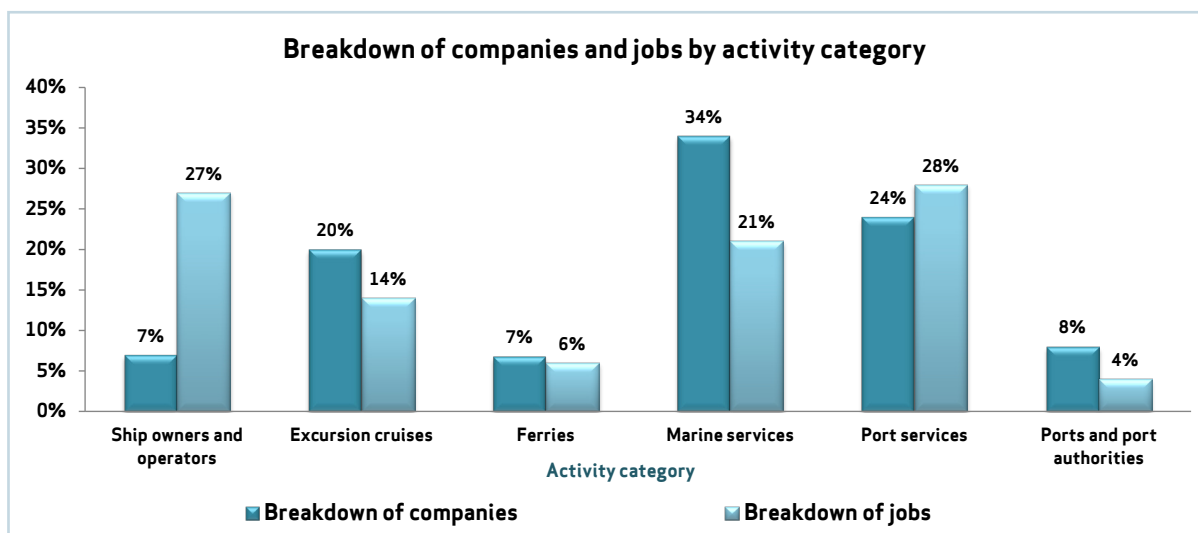


- ▶ **Port services** : organizations providing cargo/passenger stowage, berthing, loading/unloading and storage services.
- ▶ **Ports and port authorities** : entities responsible for management of all of a port's property or marine infrastructures.
- ▶ **Marine services** : companies offering a range of services to the other categories, i.e. ship inspection, naval architecture, marine piloting, employee/employer representation, port security, crew management, environmental response, etc.



MARINE-SECTOR JOBS

Marine-sector companies employ 13 222 people in Québec. If we add the number of indirect jobs, the total comes to 19 041—7% more than the 2008 sectorial study.



About the Human Resources Sectorial Committee of the Maritime Industry (CSMOIM)

Founded in 2001 and mandated to review, build consensus and take action, CSMOIM is an organization composed of employer and employee representatives. CSMOIM works to promote the interests of Québec's marine industry, developing human resources by carrying out projects aimed at training, human resources management, sectorial knowledge and planning for the new generation of workers. www.csmoim.qc.ca



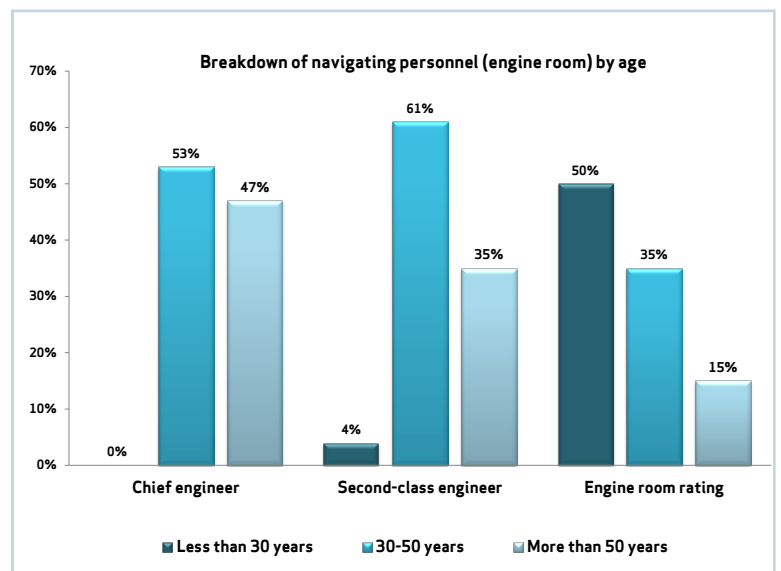
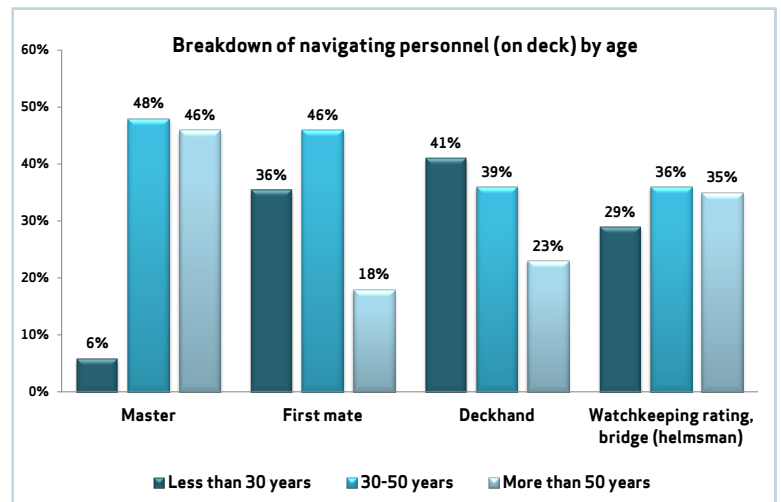
AVERAGE AGE FOR CERTAIN JOBS AMONG NAVIGATING PERSONNEL

HIRING OUTLOOK

Overall, an estimated 1966 jobs will need to be filled in the sector in the next three years. Over five years, the number is estimated at 2689.

The greatest need for human resources in the marine industry is for navigating personnel. Apart from temporary personnel, the highest demand observed is for deck officers, including navigation officers (all certificates), for 14% of the jobs to fill, followed by deckhands (12%) and marine engineers (9%).

The managers surveyed believe that the hardest jobs to fill in the coming years will be navigation officer and marine engineer.





HUMAN RESOURCES CHALLENGES

Marine worker attraction and retention

- ▶ Staffing remains an ongoing concern for marine organizations, especially where senior officers are concerned. Nearly half of all ship masters and chief marine engineers active on board ships are over 50 years of age. This puts significant pressure on hiring for these positions, particularly given that these jobs are available only to qualified, experienced applicants.
- ▶ But, there is good news. Since 2011, we have observed a considerable increase in enrolment in the *Institut maritime du Québec*'s navigation and marine engineering programs—a sign that industry partners' ongoing joint career promotion efforts have been effective.
- ▶ Land-based marine jobs also face their share of hiring challenges. Certain management-level duties requiring marine-related experience, such as supervisors, managers, teachers, are very difficult to fill. The same is true for naval architecture technicians.

Access to further training (professional development)

- ▶ The increase in regulatory requirements forces seamen to get further training (professional development) several times in their careers, either to update their certificates of competency or to acquire new ones. Access to training is problematic financially and geographically speaking as well as in terms of time, since most training is available only periodically.

New labour market realities

- ▶ The labour market is evolving. Technology aboard ships (computerization and automation) is growing by leaps and bounds. And, increasingly, vessel management requires knowledge about the environment, management and human resources. These changes create challenges for integrating new skills into the training of seamen and of those responsible for marine companies liaising with ships.

To consult the complete version of the sectorial study on Québec's marine human resources (2013), go to the Publications section of our website www.csmoim.qc.ca.



Comité sectoriel
de main-d'œuvre
de l'industrie maritime
www.csmoim.qc.ca

271, rue de l'Estuaire
Québec (Québec)
G1K 8S8

Tél. : 418 694-9059
maritime@csmoim.qc.ca

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