



Presentation to the:

Nova Scotia/BC Shipbuilding & Ship Repair
Forum on Workforce and
Supplier Development

November 26-27, 2013
IMTARC, Victoria, BC



We are Shipbuilders.

BC's Shipbuilding and Ship Repair Industry. **Work with us.**

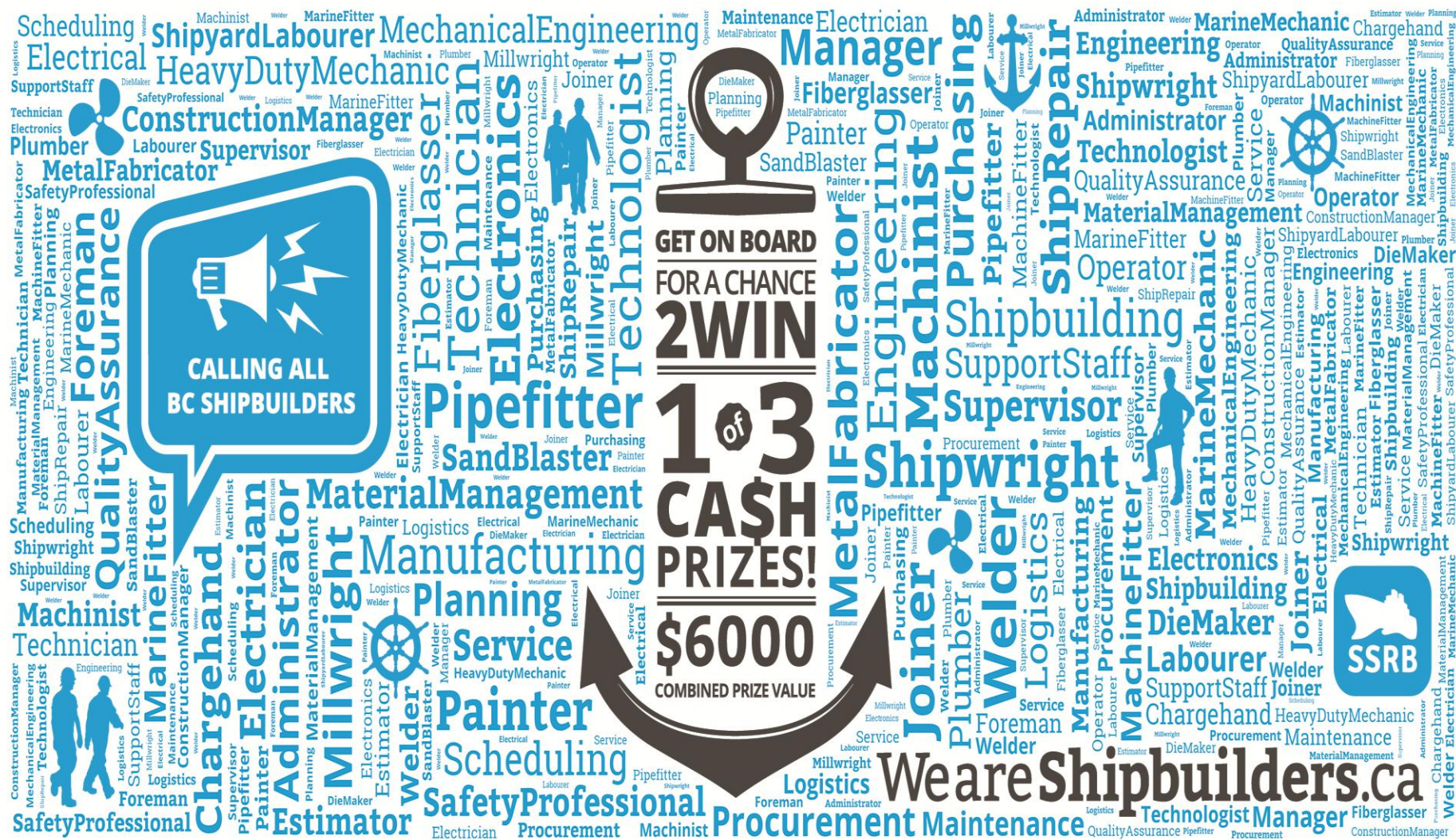
Mandate:

The purpose of the SSRB is to provide industry leadership, coordination and integration of cross-industry workforce development, technology and process development, and industry development priority actions.

- Taking over responsibilities of the former BC Shipbuilding and Repair Industry HR Committee
 - Taking ownership of deliverables of the BC Shipbuilding and Repair Workforce Table
- Finalizing and implementing an industry-wide Shipbuilding and Repair Industry Workforce Strategy

SSRB

BC Ferries serves as the host organization for the SSRB.



Bigger Picture Context

- Resurgence of the West Coast shipbuilding and ship repair sector:
 - New builds
 - Refit programs
 - Maintenance & repair programs
 - In-Service program
 - NSPS
- Projected rapid growth in labour demand
- The 'war for talent' (competition from other industries and jurisdictions)
- Trades and technical shortage
- Demographic and supply side pressures

Human capital pressures

The **competition** for **talent**

Other BC
industries

Other BC
industries

BC
Construction

BC Oil
and
Gas

Other BC
Mfg

SB
&R

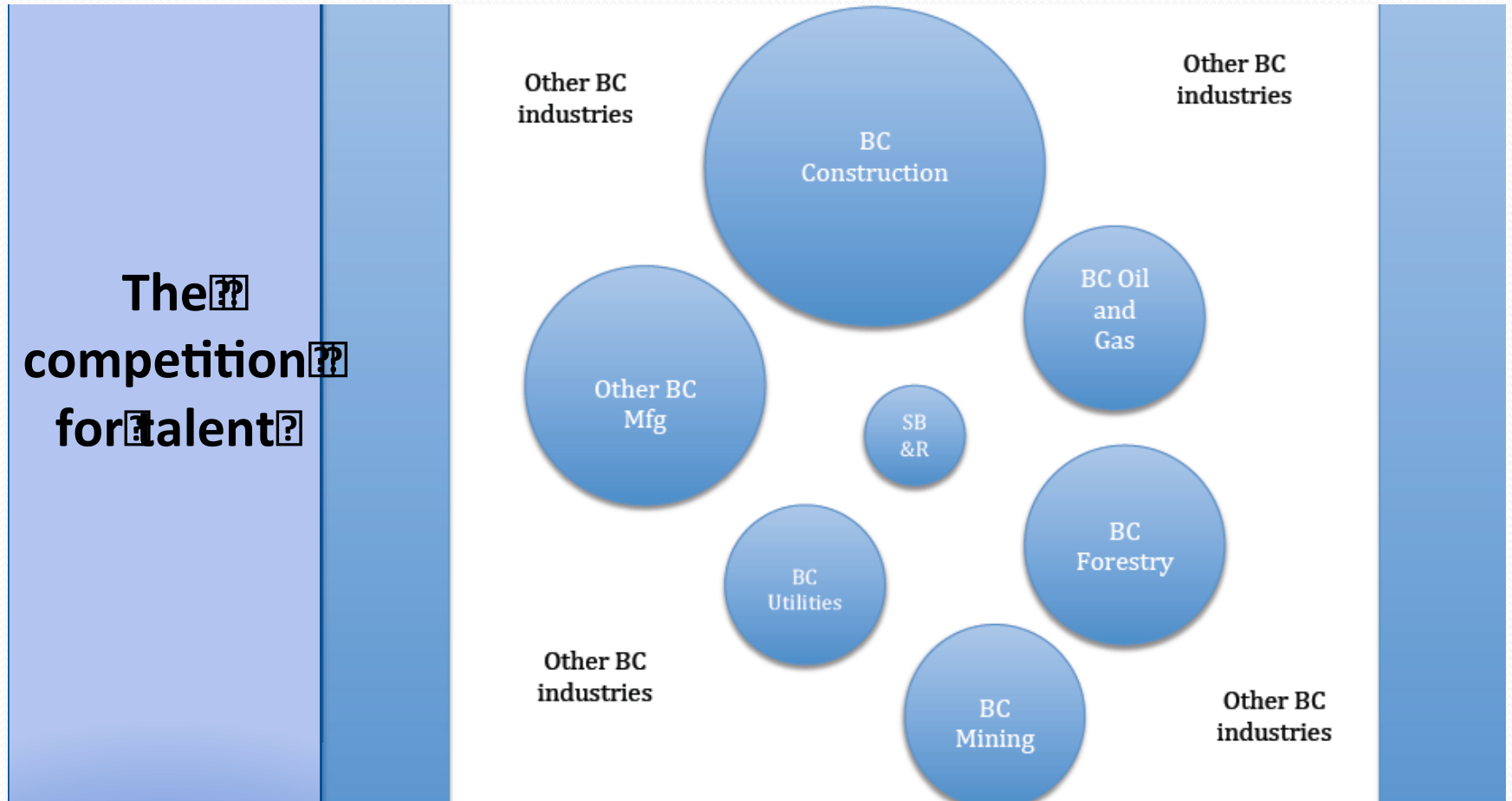
BC
Utilities

BC
Forestry

Other BC
industries

BC
Mining

Other BC
industries

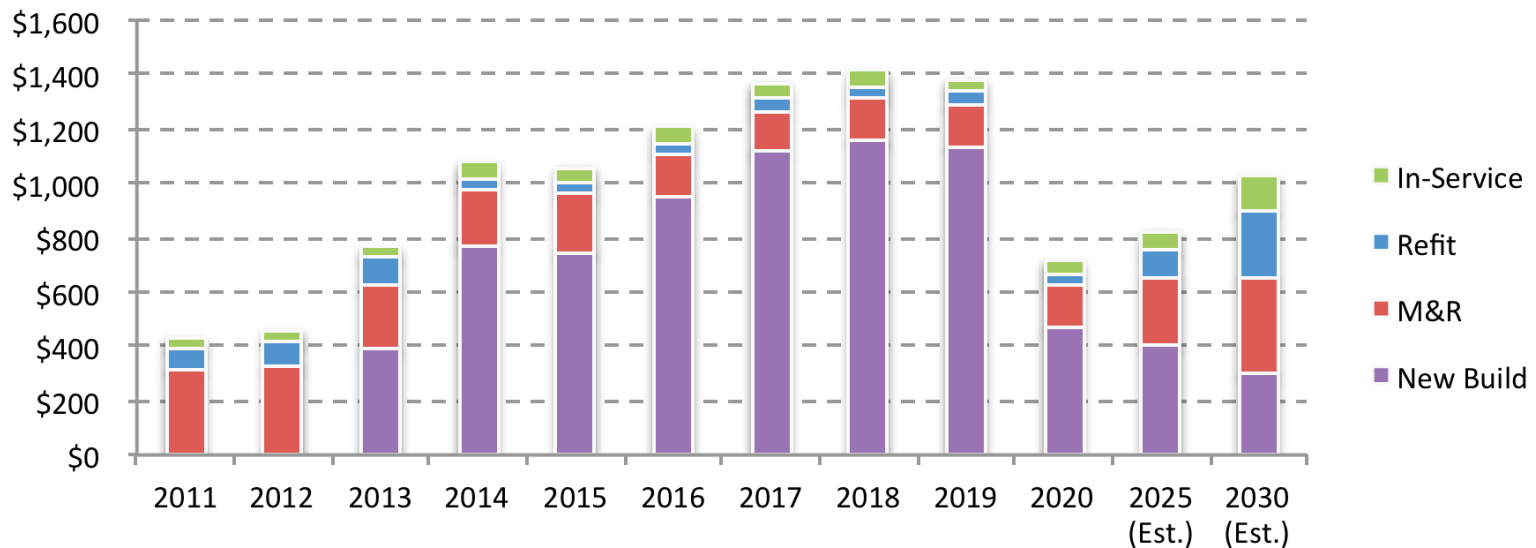


Sector Landscape in 2012

- Need for a industry-wide strategic plan
- Need for coordination and cohesion – of industry efforts, of government funding
- Fragmentation risk – need for consolidation of several structures
- Need to get a good handle on current and projected employment and skill requirements
- Need for industry to work together to implement a strategic plan
- Productivity, technology and competitiveness pressures

New investments of almost \$10 billion to 2020

Figure 1: Investment Overview in BC's Shipbuilding & Repair Industry
(2011-2030 Est.)



Source: R.A. Malatest & Associates, 2012.

Current & Projected Workforce

(from Malatest Research)

- The total industry workforce is estimated at 3,198 workers, two-thirds of which are employed by commercial shipyard operators;
- The industry workforce is dominated by workers employed in traditional (66%) and marine trades (14%);
- Nearly three-quarters (73%) of the current workforce possesses either a post secondary education or training credential;
- Traditional and marine trades occupations are projected to experience the largest number of job openings through 2020.

Employment Projections to 2016 and 2020 – S&R only

Occupational Category	2012	2016	% Inc (2012-2016)	2020	% Inc (2012-2020)
Management (Non-Production)	41	48	17%	53	29%
Management (Production)	66	105	59%	107	62%
Critical Function & Support	197	247	26%	254	30%
Professional Engineers	27	32	23%	34	27%
Technicians & Technologists	164	174	7%	176	8%
Administration & Support	173	218	27%	221	29%
Traditional Trades	2,100	3,098	49%	3,391	63%
Marine Trades	452	780	74%	953	112%
Total	3,198	4,701	47%	5,189	62%

Source: R.A. Malatest & Associates, 2012.

Other Plate & Fabrication Projections to 2020

Occupational Category	2012	2013	2014	2015	2016	2017	2018	2019	2020
Management (9%)	129	175	220	217	242	261	266	263	184
Natural & Applied Sciences (5%)	72	97	122	121	134	145	148	146	102
Business, Finance & Administration (13%)	187	252	318	313	349	377	384	380	266
Trades, Transport & Equipment (48%)	689	931	1,173	1,157	1,289	1,392	1,418	1,404	984
Manufacturing & Utilities (21%)	302	407	513	506	564	609	620	614	430
Other (4%)	57	78	98	96	107	116	118	117	82
TOTAL	1,436	1,940	2,443	2,411	2,685	2,899	2,954	2,926	2,049

Projected Total Job Openings

Sector	Baseline	Total Job Openings	
		2012-2016	2012-2020
Shipbuilding & Repair	3,198	1,926	2,838
Other Plate & Fabrication	1,429	957	1,399
Total	4,627	2,883 (68%)	4,237 (100%)

Summary of Projections

Employment/Job Openings	Time Period	Shipbuilding & Repair Sector	Other Plate & Fabrication Sector	Combined Sectors
Employment Baseline	2012	3,198	1,429	4,627
Job Openings from New Employment	By 2016	1,503	753	2,256
	By 2020	488	234	722
	Total 2012-2020	1,991	987	2,978
Total Employment	By 2016	4,701	2,182	6,883
	By 2020	5,189	2,416	7,605
Additional Job Openings from Retirements	By 2016	423	204	627
	By 2020	424	208	632
	Total 2012-2020	847	412	1,269
Total Job Openings to be Filled	By 2016	1,926	957	2,883
	By 2020	912	442	1,354
	Total 2012-2020	2,838	1,399	4,237

Source: R.A. Malatest & Associates, 2012.

Training Challenges

- Developing new skill sets to match ship construction and technology skill requirements
- Needing new training programs
- Needing innovation in trades training models and delivery
- Embedding shipbuilding and repair-specific learning content in training

Training Gaps

- Entry-Level Production
- Marine Trades
- Traditional Trades
- Professional Engineers, Technologist & Technicians
- Production Management/Critical Function and Support Specialists.

Another key challenge

Probably the most fundamental strategic challenge facing the sector is:

- The complex environment that has evolved in the industry in the context of presenting itself to governments (federal, provincial, municipal), direct/indirect stakeholders in private and public sectors, the media and the general public.

History of Industry Structures

1. WCSRF
2. RTO – initial workforce research and first LMP
3. RTO/WCSRF – Industry HR Committee under LMP (4 yrs)
4. NSPS
5. Workforce Table including necessary research (Malatest)
6. Industry discussions
7. Creation of SSRB



Industrial Marine Training and Applied Research Centre

- Workforce Development
- Applied Research & Technology Transfer

Baseline Projects in Seaspans NSPS Bid Submission

Seaspans contribution to IMTARC was one of these projects. Others yet to be confirmed with Industry Canada. To be determined.

Maritime Sector Investment Boards

As part of Value Propositions, the NSPS requires that the winning shipyards need to invest 0.5% of contract value to support the development of the industrial marine community. The money needs to be split between workforce, technology and industrial development. The MSIBs will be chaired by Seaspans and Irving and will have representatives from government, industry and academia. The MSIB will direct where future funding will be allocated.

BC Shipbuilding & Repair HR Committee

LMP Contribution Agreement – BC Shipbuilding & Repair HR Strategy Development and Implementation – Phase 3

Industry Workforce Table

(ends July 2012)

- *Coordination of Industry HR Strategy?*
- *Coordination of competitiveness and productivity road-map?*
- *Coordination of industry engagement strategies?*
- *Coordination of funding efforts?*
- *Governance?*

BC Government \$5M

To support the productivity and long-term viability of the broader marine sector.

BC Ferries \$20M

To be used towards building the capacity of BC's ship repair and maintenance industry.

West Coast Shipbuilding & Repair Forum

Industry Forum to:

- Promote Workforce Development
- Cooperate to enhance industry
- Raise visibility and promote industry
- Future visioning

Pacific Coast Shipbuilding Association

- Advocacy
- Lobbying

Western Canada's Shipbuilding Action Plan (WED)

To bring together key stakeholders involved with the NSPS with western Canadian small & medium sized enterprises to share info about NSPS and the opportunities for the industry.

- Shipbuilding Summit
- Shipbuilding Bootcamps
- Supplier Development Tours
- Investment by WED
- Advocacy by WED

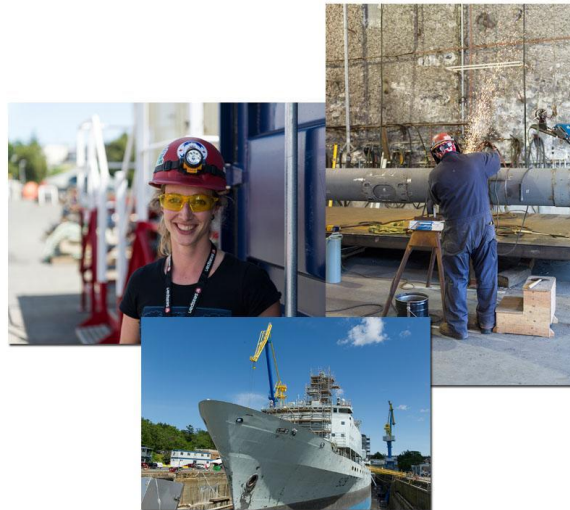
Industry Canada IRB Working Group

Determining how IRBs can be applied in relation to Shipbuilding and Repair industry work

Towards 2020:

A BC Shipbuilding & Repair Industry

Workforce Strategy



Prepared by:

BC Shipbuilding & Repair Workforce Table

Workforce Strategy Questions

- What is the **current state** of the industry and its workforce?
- Where should the industry and its workforce be **in 8-10 years**?
- How can we effectively and efficiently advance from the **current to desired state**?
- What should be our **implementation plan** for executing the Strategy?

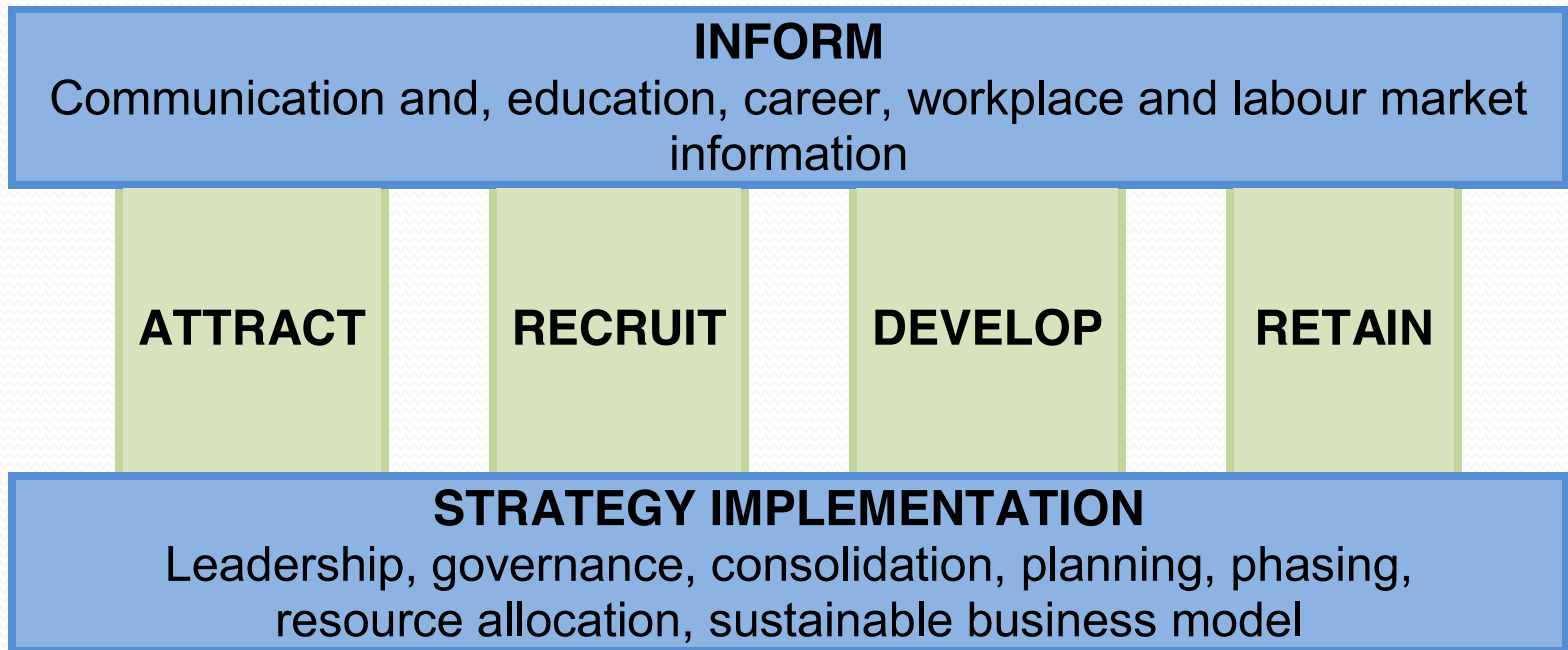


Strategy Vision

- The British Columbia shipbuilding and repair sector has the right numbers of workers, with the right skills, in the right locations, and at the right times to enable the sector's expansion, competitiveness and sustainability.



Strategy Framework



Long-Term Goals

1. Increasing awareness and attractiveness
2. Developing a sizeable skilled labour pool
3. Creating new and updating existing marine-related training, education and upgrading
4. Improving labour market information
5. Linking workforce, technology and industry development
6. Consolidating sector organizations to create a leadership body/champion/coordinator for this Strategy

SSRB Mandate

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- This includes:
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SSRB Membership

- Seaspan Shipyards (3) (Vice-Chair)
- BC Ferries (2) (Chair)
- Babcock Canada
- Allied Shipbuilders
- Esquimalt Graving Dock
- Point Hope Maritime
- Nanaimo Shipyard Group
- Meridian Marine
- One design/engineering company
- Marine Workers Union
- Boilermaker Union Local 191
- Federal Government Dockyards Trades & Labour Council
- FMF Cape Breton (ex-officio)
- IMTARC (ex-officio)
- RTO (ex-officio)
- Canadian Coast Guard (ex-officio)
- Ministry of Jobs, Tourism and Skills Training (ex-officio)
- Ministry of Advanced Education (ex-officio)

SSRB LMP Deliverables

- Formation of the Board and sub-committees, appointment of Chair and Vice-Chair
- Finalizing the industry Workforce Strategy (WS)
- Implementing WS
- Increased awareness of and buy-in to industry as a career option
- Increased participation in apprenticeship
- Increased engagement with Aboriginal people
- Increased recruitment and retention of needed talent
- Development and implementation of a communication plan
- Ongoing industry engagement
- Liaison, coordination, collaboration and alignment with IMTARC

Administration

- Funding:
 - LMP: \$321,000
 - Industry in-kind contributions: \$80,500
- Timelines: February 2013 – July 31, 2014 (18 mos.)
- Structure
 - BC Ferries: Agreement Holder/Coordinator/Host and administration
 - Board
 - Sub-Committees (can include non-Board members)
 - Project Coordinator (K. Jothen)
 - Contracted services for expertise

Shorter Term SSRB Priorities

1. Create an industry leadership structure (completed)
2. Implement the Workforce Strategy (started through #3 to #8)
3. Develop and maintain a communication plan
4. Develop and execute an Aboriginal engagement strategy
5. Develop a dedicated industry website including information on shipbuilding & repair careers, jobs, training, etc.
6. Expedite the development and execution of new training programs.
7. Develop common language/nomenclature and definitions of shipbuilding and ship repair occupations.
8. Create a Board sub-committee to identify priorities/actions regarding industry technology and process development.

...and several medium and long-term priorities have been identified.

For More Information:

Kerry Jothen
CEO

Human Capital Strategies
SSRB Project Coordinator

(250) 213-9231

kjothen@humancapitalstrategies.ca