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<b>Co-ordinator:</b>	Prof. Yannis Katsoulakos, Athens University of Economics & Business		
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Role	Persons	Organisation	Project Role
Authors	Gill Widell, Margareta Damm and Staffan Gran	UGOT	Participant
Contributors	Johan Woxenius	UGOT	Participant
Reviewer	Heather McLaughlin	GPI	Participant

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SE2.3.2	UGOT	Education and training in the maritime sector
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## SE2.2 “Maritime transport human resources and education & training”

by Gill Widell, Margareta Damm and Staffan Gran\*

Category: Review

### 1 Objectives

This report addresses the issue of human resourcing within the maritime sector. A large part of research and development within the maritime sector during recent years has been directed to themes of clustering, technical innovation and logistics. When some of those themes have touched upon manning issues, it has often concerned all other parts of the maritime sector but its core business, the sea transport personnel, or, it is treated more from technical than from human or social perspectives. This reports focuses this issue, as well as the overall human resource management problem in the maritime sector.

The maritime transport industry is immensely capital intensive, but all the physical assets are obviously useless without the workforce. Like in many industries, recruiting the new generation of people to man the sector is a great challenge for all actors involved. The problem also seem to be equivalent to industries in general, i.e. the young generations don't want to work there and do not seek education and training to become competent to work there. We will touch upon this general problem, but the focus will be on the maritime sector.

The previous 'shipping trade' has developed into what is now labelled 'the maritime sector', where all kinds of sea transports are included in addition to all their related/surrounding activities, as all the work in the ports, transports to and from ports and ships, the building and repairing of ships, dredging, coastal tourism, marine technology, environmental and coastal protection projects, etc. As has been the case for other traditional industries, as the agricultural, forest and mining, the maritime sector is now in a reconstruction process based both on staffing problems in core activities and on technical development of new kinds of businesses related to the previous core activity.

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\* all at: School of Business, Economics and Law at Göteborg University, Department of Business Administration, the HRM Research Group, P.O.Box 610, SE 40530 Göteborg, Sweden  
Email contact: gill.widell@handels.gu.se

The sea officers are the most crucial for the functioning of the core of the maritime sector, and a recent international forecast by the manning company OSM (SFBF 2008.10) is that there will be a lack of around 90,000 sea officers by 2012, which is in line with the impressive investigation on the European maritime sector resources by Weber and Nevala (2006). Other sources estimate less lack but still a growing international staffing problem, especially concerning sea officers (BIMCO/ISF, 2005). Several doubts concerning the real supply and demand of trained officers and ratings are, however, expressed in different sources. The methods used for calculating those numbers used by BIMCO (the Baltic and International Marine Council) are for example critically analysed by Li and Wonham (1999). They show that especially China has more trained cadets and officers than before, and they expect China to increase their number of skilled seafarers drastically during the 2000's. Also Leggate (2004) have criticised the assumed future lack of seafarers by analysing what is happening in the so-called 'seafarer labour supply countries' vs. the traditional maritime countries. She shows that both the Philippines and India, for example, are drastically raising their number of trained seafarers, though they might not have the same skills as what is demanded in Europe. She also demonstrates that the statistics can be misleading, as many registered seafarers are inactive, and should thus not stay in the official figures. Both Li and Wonham (1999) and Leggate (2004) have the same conclusion: it is not so much the number of seafarers, which will be a global problem, but the quality of their training. This conclusion is supported by studies on sea transport and accidents of different kinds, where the standard of training seems to be determining, both as what concerns the safety and health of the staff onboard and the environment (i.e. Macrae, 2009; Thai, 2009; Talley, Jin and Kite-Powell, 2005; Ek and Akselsson, 2005; Ma, 2002).

Around 1.25 million persons are employed *on board* in the sector worldwide, of which around one out of three is an officer (according to The Swedish Maritime Administration, 2009, which is the latest figure we have got). The Swedish maritime sector is comparatively small, but the proportions are probably more or less equal to other countries. Sweden has 15,000 employees onboard and another 5,000 directly employed in shipping and ports on land. Another 50,000 are employed in administration and service close to the sector and in a wider sector another 150,000 are indirectly part of the cluster offering consultancy, transport, banking, cleaning oil delivery and other services. Thus, one can expect around 10–15 times more people than those at sea to be employed in the worldwide maritime sector as a whole, which means somewhere between 12.5 and 18.57 million people.

The estimated lack of sea officers does not seem to be reflected in other professions within the maritime sector, though there is a general need for a raise of competence in all parts of the sector. This can however be discussed, as the rate of efficiency and innovation seem to be high, and there is thus uncertainty about which directions in specialisation the development of the sector will take. Gardner and Petit (1996) assumed in the middle of the 1990's that around 70% of the shore-based jobs needed sea experience – whether this figure will rest for future development or not we cannot foresee at the moment.

*The purpose of this study is to give an overview over the current human resource situation in the maritime sector, to formulate important challenges, and to suggest possible strategic questions for investigation in order to meet these challenges. Within the issue of competences needed within the sector and how to provide it, this report will conclude by formulating the most crucial questions in need of further investigation.*

## 1.1 Target Stakeholders

*The main stakeholders are:*

- Commercial actors in the maritime transport sector like ship owners, manning companies, forwarders and ports.
- All individuals working in the sector and their labour unions.
- Government in the roles of funding education and in sector control roles.
- Universities and other institutions supplying maritime education.

## 1.2 Glossary terms

*Human resources (HR<sup>2</sup>) in the maritime sector are often discussed as the crews on ships, but this can be a too narrow perspective. While the size of crews on ships has decreased significantly over the years in most segments, perhaps excluding the cruise segment, the portion of the maritime sector now working in the offices, designing, marketing and controlling the transport services has increased. Mechanisation in ports has also meant a decrease of workforce, but on the other hand, increase in competence is needed. In addition, there is a growing part of the sector in activities as dredging, coastal shipping and tourism, energy development and maritime sustainability projects. Maritime technical development and maritime related logistics are thus growing as labour markets, which imply competence development. The human resources within the maritime sector concerns all staff at and around the ship transport, and all their related activities on land and sea.*

*Human resourcing and Human Resource Management (HRM) include three main types of practices: I) *attracting and recruiting*, II) *retaining, i.e. developing and training*, and III) *releasing* human beings. In this report, all three activities will be discussed with focus on their relevance for the current trends and strategic development in the maritime sector. In order to attract and retain people on long term, it is assumed that there must be consistency between work relations, organisation strategy and em-*

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<sup>2</sup> HR within this discipline means Human Resources, whereas HR more generally is the abbreviation for Human Rights. The respect for Human Rights is, though, a basic value system for most people dealing with HRM issues.

ployment relations. The operationalisation of this consistency can be the role of HR departments, but is the responsibility of the top management of all organisations.

### 1.3 Issues and structure of the report

The work primarily takes the management perspective of the commercial actors and the preconditions for effective manning of the tasks needed for a thriving European maritime transport industry.

*The Work Plan* will follow the 'standard' cycle:

1. literature survey
2. contributions by related EU projects
3. outstanding issues
4. solution options
5. recommendations
6. reviews and refinements

The sub-studies will also include web-surveys and case studies. The work will continue until 2010.

*The structure of the analysis of this report will be as follows:*

- a) Background and explanations of the staffing problems
- b) HRM perspectives
- c) Recruiting and attracting
- d) Retaining, developing and training
- e) Career development
- f) Releasing
- g) Why HRM strategies are important for the maritime sector
- h) Conclusions and recommendations

### 1.4 Approach

At this stage, the study is built on literature reviews: on the current front in HRM research and on recent reports on the conditions and trends about staffing in the maritime sector.

The final study will consolidate the findings from the sub-studies taking different perspectives and also fill in missing parts at a more general level than the dedicated sub-studies. The work will start at this level and then successively be refined as the sub-studies progress, during the end of 2009 and the beginning of 2010.

## 2 Analysis

### 2.1 Background and explanations of the staffing problem

The maritime sector consists of professional seafarers of different kinds *and* of quite a few different other professional people on land, e.g. shipbrokers and ship-owners, crane operators and other people who load and unload, boat builders at shipyards, etc, *and* varying types of organisers and transporters who plan and operate the logistics of the whole transport system where the shipping is a part. A career within the maritime sector can thus vary. Our assumption so far, however, is that a future career within the maritime sector can vary even more than today, i.e. more flexibly between the different types of organisations and work places at land and on sea. This assumption may be fostered for example by technical innovation systems and by the strategy of regional clustering, which we will come back to later in the report.

According to what we have found so far, the reason for the staffing problem on today's agenda within the maritime sector is mainly due to the experienced shortage of sea officers, i.e. lack of employees with core competences for taking responsibility for the navigation of the ships, which can be classified as the core activity of the sector.

There are a few common explanations for this staffing problem. One explanation is the turnover of skilled seafarers. Sea officers seem only to stay at sea around seven years on average after their exam, as they then seem to prefer shore-based employments (OECD 2003). We haven't found any study on where they go after their years' at sea, though one can suspect that most of them continue their career within the shore-based maritime sector if they find work there. The cause for their leaving the sea is that they want to stay with their families (Thomas, Sampson & Zhao, 2002), that the sea-bound salary is not good enough (Weber & Nevala, 2006), and/or that working conditions at sea are not perceived as attractive enough in the long run (ibid). There also seem to be generation shift within the trade, which affect the turnover (ibid). Quite a few skilled seafarers retire during the beginning of the 21<sup>st</sup> century, and enough newcomers do not replace them. This generation shift might go hand in hand with a structural change within shipping. As for example Kumar and Hoffman (2002) points out, seafarers are nowadays more often contracted by voyage, whereas before, a lifetime loyalty between seafarer and ship owner could develop. This change is caused by "ship ownership and operation shift from traditional owners to pension funds and conglomerates that seek instant gain from the sale and purchase market (for ships) or from certain tax exemption loopholes" (ibid, p.57).

Another explanation is that not enough young people are attracted to the maritime sector, or more specifically, the sea. Maybe the ignorance of what people actually do at work is generally common among the young generations of today, as society is segmented so that the contacts between homes, schools and work places are few if any, and so that generations do their different activities

separately during leisure as well. If the young generations sort out some professions in favour of others, it might be because they hardly know they exist. Around ten years ago, The Swedish Rail Administration had a huge recruitment problem, and they managed to solve it partly by information campaigns in schools. Different kinds of activities directed to schools and young children did help this attraction raise, and their explanation was that young people today did not know enough about the professions in the railway sector.<sup>3</sup> Equivalent activities have now started in favour of work at sea in different European countries.

A totally different explanation is that staffing problems within this sector has so far mostly been dealt with on an aggregate level, i.e. more as a technical problem than as a human problem, concerning subjective human beings. Studies concerning human resource management practices within the maritime sector are few, so we don't know much about how the organisations within the sector deal with their employees. Research within this sector seem to cover technical development, logistics, and regional planning and innovation – but no industrial relations, no personnel management, no HRM<sup>4</sup>. This is also the conclusion of Ruhullah (2003), who is one of very few who have addressed the human resourcing problem as an issue about human beings. A need for such studies and such practices might not have been obvious, if, before, there were long-term psychological contracts between ship owners and their employees. With mutual understanding and respect, on a local level, systematic HRM might not be needed.

With the purpose of contributing to the developing of working conditions and career at sea within the maritime sector human resource management, we here intend to apply an HRM perspective on the maritime sector and draw conclusions from this. The three main processes of Human Resource Management, recruiting, developing and releasing, will thus constitute the main structure of the analysis, applied on the maritime sector. On this basis, we will suggest on which themes more investigations seems necessary and why.

## 2.2 HRM perspectives

Human Resource Management mainly consists of three phases, recruiting and selecting, retaining and developing, and releasing.

Attracting and recruiting the right people is, according to several studies, more efficient than attracting and recruiting more people (e.g. Delaney and Huselid, 1996). And to develop the ones already in adds value to the already inherited knowledge about the organisation and its processes and rela-

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<sup>3</sup> A short presentation of the process The Swedish Railway Administration has used to attract and retain personnel can be found in Attachment 1 to this report.

<sup>4</sup> In 2008, a PhD thesis on “Human Resource Management in the Maritime Sector” was defended by Jafar Sadjadi at London Metropolitan University. We have not yet, however, been successful in our attempts to find a copy of this.

tions. Some researchers even suggest that it might be more profitable to take in just anyone and then use all resources to develop those who are in. The main conviction among researchers is, however, that all organisations would profit from taking better care of people within the organisation, rather than using an overdose of resources to recruit new ones.

A basic assumption is that the individual and the organisation are related in a mutually dependent psychological contract (Rousseau and Schalk, 1995; Larsen, 2004). This contract is both between the two parts and embedded in the industrial relations of the country or the involved nations. 'Industrial Relations' is about the relationship between three interests, the governments', the (organisations' of) employers and the employees (or the trade unions). HRM is defined as a strategy about employees as a resource of vital importance for the success of the company. 'High Performance Work Systems' is a concept aimed at characterising contexts and conditions where there is consistency in the relations between organisational strategy and psychological contracts and trustful relations based on transparency and mutual adjustment (Boxall and Purcell, 2008). The main requisites for a psychological contract are some degree of personal freedom and social stability in the surrounding society, without which no 'high performance work systems' will evolve (Rousseau and Schalk, 1995).

Storey (1992) has formulated a model on the difference between 'hard' and 'soft' labour management. Hard HRM is defined as strategic interventions designed to secure full utilisation of labour resources, and soft HRM as strategic interventions designed to elicit commitment and develop resourceful humans. Usually, the soft way of HRM is used about professional employees, as are sea officers. The employer often expects 'value creating' activities from professionals, more than from unskilled labour (Legge, 1995).

The core of human resource management thus include such practical organisational activities as recruiting and selecting, retaining and developing, and releasing, and that those activities should be clearly related to the overall strategies and processes of the organisation. We will therefore start with these, and afterwards complicate the scene by the contexts of the maritime sector, in which the HRM issues are embedded, by discussing the effects consciously developed and used HRM strategies can contribute to.

### **2.3 Recruiting and attracting**

*Planning needs of recruitment* can, as a part of HRM, be performed "hard" or "soft". The so called hard way uses seemingly rational, quantitative means: the forecasted number of available people is subtracted from the forecasted number of future needs of people, and the result will show how many people you need to recruit, develop and/or release. The so called soft way of developing the HR planning of the organization builds on developing motivation, attitude and 'culture' of the or-

ganization, and thus gives room for innovation and unforeseen possibilities. Usually, a combination of the two ideal ways of planning is recommended (e.g. Boxall and Purcell, 2008).

A recruitment problem, which currently faces the maritime sector, is when people with core competences for the sector are scarce. If so, the quantitative definition of need for people with a certain competence is required – and the following strategy should be to attract and/or retain and develop people with this competence. But, how can one really know which people with which competences and talents the organisation will need in the future? The recommendations are to try to forecast international, regional and national labour markets, and to make some different scenarios from those forecasts, on short, middle and long term, with different assumptions about the development on different levels (ibid). To discuss conflicting views of development and of underlying values usually contribute to strategic sustainability (e.g. Haukedal and Grønhaug, 1988). This is what currently is going on in the maritime sector generally, for example within the European Union and within and between other multilateral organizations, concerning the development of the maritime sector.

During the last few years, the concept of *'talent management'* has become popular for characterizing the HR activities aiming at attracting, retaining and developing those with core competences in the organizations. Talent management means this, and, in addition, to let those people free to take an active part in strategic and other development.

Talent management is thus as much focused on the internal labour market as external recruitment possibilities (Boxall and Purcell, 2008; Agrawal and Thrive, 2003). In order to profit from the talents already recruited, one must get a clear picture of their different professions and competences, their turnover and stability, and offer them the training and development possibilities they need to get motivated to stay and to develop the organization. The threat of the external labour market is always there, however, in the form of the attractiveness of the competitors, the image of 'the best place to work in', interest in technical or other development, etc. The external labour market, in the form of competitors, is of course also an arena for recruitment possibilities of talented personnel. Therefore, complex views about what goes on in the industry and globally should continuously be enacted by different parts of the organisation, especially all staffing responsible (Boxall and Purcell, 2008).

The issue of competition between ship-owners has been discussed for example by Ding and Liang (2005), who have analysed the Taiwan national ship-owners, and Wu (2004), who focused on the Chinese. In both articles, the complex relationships of many factors are discussed. Clearly, language plays an important role for the manning of ships, as English seems mandatory for working internationally. This is why many ships with Asian owners are manned with crew from only one nation. Also professional standards vary, and there seem to be a great ambiguity between the temptation to learn more by mixing staff from different countries and the security, or comfort, one feels with staff from the home country. The recruiters wish to have crew with high skills who communicate well and are physically and psychologically fit. The most important factor when recruiting, however, is the crew salary,

and this vary with country of origin, with agency, with industrial relations, and with local and global labour supply and demand (Ding and Liang, 2005; Wu, 2004).

The conclusions from the Council of the European Union on strategic objectives for a European Union maritime policy (7866/09) focus, among other things, on the problems in finding competent seafarers within the European Union. The decision is to advocate an optimistic view about working in the maritime sector, both on sea and with technical development, and also to, generally and globally, work for raising the quality of the sector and the work places within it, through education and training, through combined career possibilities, and through international labour laws and regulations. This decision seems to be in line with the strategies of the International Transport Worker's Federation (ITF)<sup>5</sup>. We assume that the continuation of for example this SKEMA study will support the possibility to realize these strategies. Our comment to this, from an HRM point of view, would be to be even more systematic and careful about the implementation of such strategies, as those seem to demand a paradigmatic change of leadership style within the sector.

Another aim of the European Union Commission is to increase the number and quality of maritime jobs for European citizens. The decline in seagoing employment is perceived as worrying and needs to be reversed, as seafarers' experience may be a key also for shore-based jobs. The impact of tonnage tax on the manning on-board has been investigated by Leggate and McConville (2005), with special focus on the UK context. They assume that the tax attracts larger vessels, but maybe fewer, which doesn't have the desired effect on the European labour market. Improved staffing policies and working conditions (including health and safety), supported by a concerted effort by all maritime stakeholders and an efficient regulatory framework, taking into account its global context, are assumed as necessary if Europeans are to be attracted to the sector (Lindwall, 2007).

Recruitment efforts will thus be directed to where 'the talents' are, which seem to be in 'Western countries', where they are scarce. The second recruitment effort will be directed to 'labour-supplying-countries', like the Philippines, Indonesia, China, and India (Leggate, 2004), where the quality of skills is more varying, but both quantity and quality seem to be increasing (ibid; Li and Wonham, 1999; Obando-Rojas, Gardner and Naim, 1999; Wu, 2004, etc).

## **2.4 Retaining: developing and training**

When it comes to the *development of personnel*, an individual and an organisational learning perspective should be combined. Even if the organisation manages to recruit and retain core competences, the creative challenge of new innovations and market development is always there.

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<sup>5</sup> <http://www.itfglobal.org/>

The individual needs to update and develop his or her personal competences – and this is especially important in professions like sea captains, pilots, etc, where technical knowledge gets old if not updated, and where safety is involved (Sandoff and Widell, 2008). Also, a lot of learning takes place in the work group and in the different organisational settings, where people do things together, in the everyday routines as well as during special unpredictable events. Work groups with different competencies, as those working on a ship together, develop through daily mutual learning processes, by working together, a kind of collective competence (Hansson, 1998), which is costly for the organisation not to make use of and let free to develop on its own conditions. It is through regularly reflecting upon recent events and mutually discussing of possible actions that the work groups learn to be prepared for the unexpected (e.g. Czarniawska et al, 2007).

The different activities the organisation can offer include different formal courses as well as on-the-job training, action learning, coaching and mentoring, feedback, etc. To attract professionals with scarce competencies to stay in the organisation, HRM practices should be flexible enough for the different individuals to choose from, according to his or her ambitions, life cycle, etc. The SKEMA study of port related training showed, among other things, that successful training for port and dock workers were flexible, near the work place and related to work, and supported both by the management and by government (Trant and Keogh, 2009).

Employee motivation can be stimulated through incentive compensation and performance management systems, through protecting employees from arbitrary treatment, through employee participation systems and team-based production systems, and through complementarities and synergies among HRM practices (Delaney and Huselid, 1996).

In an OECD-report (2003), the maritime sector is roughly divided into four areas, safety, technical, commercial and others. "Others" include management training, with all areas of finance and budgets, personnel or human resources, marketing, public relations, administration, training and secretarial skills. Obviously, these functions of the officers' role are perceived as highly demanding and time consuming, but, in many cases, totally overlooked by owners, operators and training establishments, though the mainstream of officers in shipping, want to develop their social and management skills. Trant and Keogh (2009) also mention management training as desired within the sector.

As mentioned in the above section on recruiting, there are varying levels and types of education and training possibilities in different parts of the world. For example are India and China, presumably, on their way of raising the quality of training their seafarers, officers included. Successively, their seafarers now get more international experience, which has effects back on their developing their training systems (Wu, 2004; Leggate, 2004). Ma (2002) argues that it is the responsibility of the ship-owner not to let any crew handle a ship without enough training and education. He has

shown that health and safety on board also affect environmental safety and economic outcome – and the value of those factors are supported by level of training.

For the whole sector, sea-based experience seems to be perceived as crucial. Obando-Rojas, Gardner and Naim (1999) formulate this demand very strong: 'There is clearly only one supply of manpower, the pool of certified officers, for both sea-going and shore-based maritime jobs' (ibid, p.46).

On the issue of retaining, we can thus conclude that there is a lack of systemized training possibilities. They rather seem to be totally dependent upon the individual employees, and they don't often have the time and/or the resources available. The more technical training is usually delivered at universities and training institutes, but there seem to be a need for more training in administration, social skills and management. Also, the training offered does not seem to be enough adapted to the daily working conditions, as it is not often possible to work parallel to new training and development. The result is that people who are not satisfied with their working conditions and possibilities for development leave the work place and eventually the sector. In order to discuss this issue further, we continue with the concept of career development.

## **2.5 Career development**

The OECD-report (2003) mentioned above refers to a study about seafarers and their thoughts about career paths. Within the maritime sector, a discussion has been going on about how to make possible a long-term marine career, which includes both sea service and periods ashore, on a continually rotation basis. 73% of the seafarers confirm that they would desire this type of career. Instead of losing skilled employees, one can assume it would be profitable to construct such flexible career paths.

One way of dealing with those ideas is with reference to 'soft' HRM, where, for example, the total working conditions are seen as related to the whole individual, as a person with a private life as well as a work life. If the explanations about why people leave their work at sea are correct, i.e. family concern, the salary, and work conditions, one should address those issues carefully and in-depth, when trying to create manageable career options within the maritime sector.

Thomas, Samson and Zhao (2003) have investigated the relation between seafarers' work and family life, in China, India and the United Kingdom, by interviewing women with husbands working as sea officers. The result shows that the long periods of being away and at home, interchangeably, disturb the marriage as well as the relation to the children, and that these effects influence the working conditions. When the husband was at sea, the wife felt lonely, and when he was at home he needed some time for adjustment to home, and after, a period of anxiety for the next trip. However, if the wives and the children were allowed to visit the boat, and to stay onboard during some

of the route, as was the case for Indian and British officers, the relations were improved, even if not totally acceptable. The Chinese families were only allowed to visit the boat in the homeport.

The conclusion from this study was about lack of attention from the employers' side to these questions. The common attitude is that family life belongs to the private sphere, where the employers should not interfere. However, an officer under stress can be a risk factor. He can be depressed or aggressive and thus cause accidents. An unbalanced family life can also explain why officers prefer to go ashore only after a few years, leaving the occupation they are educated and trained for (ibid).

A sea officer is a form of profession. According to Abrahamsson (1985), three characteristics form what is called a 'profession':

- 1) A certain theoretical base, which takes time to assimilate, but with this basis, a monopoly of knowledge and a profession is grounded. No one without this theoretical basis is allowed to practice the profession.
- 2) The members of a profession have a special sort of spirit together with colleagues and customers. During the education, this special spirit is learned, and it is cultivated through being active in the profession.
- 3) The members have certain ethical values. Not following these, means a risk of losing the permission to practice the profession.

At the university, the students receive a base of knowledge with a special theory. The theory qualifies them to a profession. We don't know if they have a special spirit and ethical values because there are no studies about sea officers as a profession, but sea officer is a sort of 'capital profession', as opposed to 'public profession', as they are, in most cases, privately employed. Private business is not particularly interested in *formal* competence and thus capital professions tend to be comparatively weakly organised. In the public sector, with public professions, formal competence is imperative. Capital professions have supply and demand as the driving force, while resources drive public professions. Members of capital professions have to compete in a market and thus, processes of choices are important. Employers want the best members of the 'profession' with high valued competences.

Thus, both private and public resources are invested in the education and development of sea officers and also in other vocational training for different parts of the maritime sector. When they leave, those resources are more or less lost, and totally new investments have to be made. While many of these professional competences are 'perishables', i.e. the knowledge of laws, regulations and technical development, as well as the intimate tacit knowledge about ways of working, the basic understanding of the profession most probably stay within the individual, and could be retained and redeveloped. In many such work places, where risk and safety is involved, there are rules for how to regain lost competence and to readapt to common situations. Such systems can be developed also within this sector, even if the periods without any sea experience must not be too long. With some kind of elaborated and transparent system of flexible maritime careers, the possibility that the sector might win back more of the skilled employees, and less of them might leave.

Currently, however, the focus seems to be on recruiting as cheap crew as possible with acceptable quality, on short-term contracts, which does not support the demand of continuous training. When the crew on a ship consists of officers from one country and ratings from another country, and there are language problems to deal with in addition to the different expectations of skill, the conditions for further training and professional up-dating might not be the best.

## 2.6 Releasing

*Releasing people* can be either voluntary or involuntary. The most natural voluntary release is perhaps when employees retire, as everyone usually expects this well in advance. It can, though, be perceived as involuntary by some people who have built their life upon the work role and if they look forward to the retirement with anxiety. Before, there were many stories about sea officers who went back to sea a few years after retirement, because they did not find a good way of living their lives on land, as they were not used to it, except for a short period each year between their trades. Nowadays, however, these stories are not so common anymore, because officers more often their duty on board long before their age of retirement.

It is of course also 'natural' to end an employment for a new job or for training or education. These options can be more or less desired by the employer. An employer who is forced to release employees because of redundancy and/or market failures can offer education and training or just dismiss people into unemployment.

There seem to be a drainage of skilled labour from developed to developing countries around the world. There is also a more dubious supply, of both officers and ratings, offered from some of the developing countries, all affecting the human resourcing in the world maritime sector. In all sectors of society, however, more and more highly skilled labour from developing countries, such as India and China, compete with their colleagues in the Western world, and they are satisfied with less salary and less influence, though they know the value of their contributions. Also, large, in their home countries well established, companies from these countries are beginning to compete on the same arenas as for example European and American, by technical and other excellence. These international movements of people and organisations are more common and will most probably become more common than ever before, as companies are more international than national today, and because the maritime sector, mostly, can be nothing but international, as the seas are global.

The talent management perspective is applicable here. Competing standards and regulations and tougher margins underpins both a competition of recruiting the most qualified and a 'race to the bottom'. The manning agencies around the world are sometimes mentioned as responsible for this trend, as they, by neglecting international standards 'contribute significantly towards wastage of maritime manpower' (Ruhullah, 2003).

The releasing within the sector, thus, seems to be more or less involuntary both from the employer and the employee side of the psychological contract. The employers want skilled employees to stay, and the skilled employees want to stay but cannot, because of family reasons and because of relatively better offers from other work places.

### 3 Why HRM strategies are important for the maritime sector

We will argue for HRM strategies being imperative for the sustainability of the maritime sector as they are means for developing safety, performance and profitability. Such a need was already argued for in 1999 by Obando-Rojas, Gardner and Naim, and it has since been in the agenda but not effectuated:

*'There is a sensed need in the maritime industry as a whole, and particularly in the management of its human resources, to move from tactical decisions, that is moment-by-moment – firefighting – decisions, into the field of strategic planning, that is establishing long-term policies and setting precise guidelines for taking tactical decisions'(ibid, p.41).*

As we have discussed above, previous and current non-strategies on HRM issues, have contributed to instability of the whole sector. Even if the maritime sector is worldwide and highly interrelated, it has not lived up to the work development conditions and standards of industrial relations, as have other sectors in society developed during the last decades. These are reasons why previously employed leave and not enough from the new generations enter.

A sector imbalance should, probably, be dealt with on the sector level, but also in all parts of it, and in relation to the surrounding societies. One of those strategies being promoted during the last years, is 'clustering'. One of the recommendations from the European Commission is to promote 'interconnectedness of sea-sustained activities' (SEC (2007) 1406: 11 and 14), i.e. to support clustering, as clustering is presumed to increase innovation and prosperity generally<sup>6</sup> as well as in the maritime sector (ibid). Lazarovaa, Morleyb and Tysonc (2008) argue that the global competition, especially among transnational companies, increase comparative studies followed by strategies to leverage HR strategies for both local and global competitive advantage. They especially focus on the dual pressure from increasing complexity and increasing uncertainty. What is relevant here is the assumption of HR strategies being spread by imitation through a cluster of interconnected organisations.

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<sup>6</sup> [http://ec.europa.eu/regional\\_policy/index\\_en.htm](http://ec.europa.eu/regional_policy/index_en.htm)

A cluster is, according to De Langen (2002), 'a population of geographically concentrated and mutually related business units, associations and public (private) organizations centred around a distinctive economic specialization' (De Langen, 2002:210). The advantages with clusters are presumed to be economic, through using and exchanging common resources, for example in the form of a large labour pool, employee training possibilities and regional learning, and through using all associations of all included member organisations (ibid). The knowledge 'spill-overs' are mentioned by many cluster-researchers, which is an effect not only of labour cooperation but also of labour competition (Sornn-Friese and Iversen, 2002; De Langen, 2002; Ruhullah, 2003; Palmberg et al, 2006; SEC (2007) 1406; Beer and Meethan, 2007).

In the maritime industry, these investigations are mainly from the 2000's. Beer and Meetham (2007) conclude that clustering generally promote increased productivity and innovation capacity, and also a generally raised frequency of entrepreneurial activity. Borrowing the concept of "institutional thickness" from Amin and Thrift (1995), they show that the maritime cluster in South West of England promote interesting training possibilities, career paths and more robust and competitive organisations. De Langen (2002) showed that different clusters within the same country, The Netherlands, develop different focuses within the maritime sector, such as shipbuilding, port, dredging, etc., in our interpretation caused by the same factors as was stated by Sornn-Friese and Iversen (2008) concerning the Danish maritime cluster development, historically developed institutions combined with individual and collective agency, based on interest in the region or in the country. Finland is another small country with a highly developed maritime cluster with yards for shipbuilding of icebreakers, cruise liners and cruise ferries. This cluster is surrounded by SME's for technology supply and service support.

According to Larsen and Mayrhofer (2006) the institutional context for HRM practices within European work places are unique. They describe certain traits, which can be found in many European countries, more or less alike. To be a European Union member, or to want to become one, contains, among other things, to work under the context of centrally regulated deregulation, which influences HRM practices. There are "the greater variety of forms of employment, working time regulations or the enhanced freedom of labour movement within the EU" (ibid, p. 8). This implies both freedom and anxiety, argues Larsen and Mayrhofer. There is the freedom to develop various kinds of employee-employer relationships, but both sides also experience the risk of losing the contract due to this 'flexicurity', even if the disadvantages more often are on the employee side than on the employer's. International movements of work force contain both highly professional and untrained, and within both categories, there are people who stay as long as they can and people who will move, if the conditions don't suit them and if they have alternatives. The movements also mean a growing diversity within the work force. People from different origins, talking different languages, and bearing different professional and other institutions about what work is, professional working procedures, and the relation between life and work, etc. All those factors influencing current HRM imply a growing loose coupling between strategies and practices.

These conditions, which are described as 'new' in the European context, have, however, been prevalent at sea for many years. The working conditions of seafarers are, and have been, international, if not always on board at least in ports and in other interactions concerning services and products of the sector. There seem to be an imbalance, though, in the maritime sector, between the long experience of cultural meetings and the development of strategies to handle those, within each and every organisation and work place.

The regulated deregulation thus hits both ways, and the relations between employers and trade unions are changing drastically, though one of the advantages for HRM in Europe has been the strong trade unions. Larsen and Mayrhofer mean that we are on the way from industrial relations to employment relations, and those now take all sorts of forms. These conditions are also evident for the national and international transport workers trade unions of Europe. A relevant question is if such relations, and HRM strategies, should and can be the same in all organisations and in all nations.

Delery and Doty (1996) have shown a universally valid relation between *profit sharing* and performance, which supports both agency theory and a behavioural theory explanation. *Employment security* is also of importance universally. The relationship between HR practises and financial performance is also said to be contingent on an organisation's strategy, as contingency results provides support for strategic HRM, mainly for *performance appraisal*, *participation* and *internal career opportunities*. Contradictory to what one might suppose, talented employees are shown to stay if they clearly perceive possibilities to internal training and career opportunities, but they leave if they don't see attractive career possibilities.

Paauwe (2009) has recently summarized the current achievements on HRM and performance. He starts of with reference to Guest (1987), who assumed that HRM as a new concept would contribute to *commitment*, *flexibility* and *quality*. He states that HR practices clearly have positive effects on organizational performance, the size of which, however, seems to differ between different studies.

These results can be applied on the maritime sector. In those parts of the sector where there is a mutual ownership/partnership among those who work there, as in fisheries and other SME's, people usually stay in the organisation and put effort in developing themselves as well as the organisation. Swedish examples could be the ship-owners and the fisheries at Donsö, outside Göteborg, where the whole life of many inhabitants are related to the more or less mutually owned small maritime companies, and a strong loyalty to the local church (Forsberg, 2001). The Donsö maritime cluster is a part of the larger West Coast, or Göteborg, maritime cluster in Sweden (Palmberg et al, 2006). The partnership promotes symbioses between the organisation and the individuals work and social environment. When people take part in developing the strategy, they also tend to develop loyalty for the organisation (Sandoff and Widell, 2009). Career paths and organisation development goes hand in hand, both ways, which means that the employer is also loyal to the employees, by

transparency and respect, and by giving opportunities to take part in development processes (Forsberg, 2001). There are probably many such examples worldwide.<sup>7</sup>

Within larger organisations, with more formal employer-employee relationships, we can see the same phenomena, in other forms. When employees experience a clear relationship between performance appraisals, i.e. feedback systems, and possibilities to develop in the occupation, they tend to stay and to take part in the developing of the organisation, and in that way they contribute to the organisational performance. The capability to contribute to organisational performance is rooted in *clear appraisal systems* and *fair and transparent promotion systems*. These systems are also promoted by clustering, as the competitions within clusters are not only about customers, but, and maybe primarily, about talented employees. The more distant employer, like the pension funds and conglomerates Kumar and Hoffman (2002) described, could develop such relationships if there is a wish and if the strategic HRM is implemented carefully.

Some HRM strategies thus seem to be applicable universally, whereas others must be adapted to the unique circumstance and relation. Human beings are both very much alike and at the same time unique. This is why relations are both unique and also, to some extent follow recognisable patterns. The common trait within all organisations, all work places, is that caring about people shows in performance, and performance resides on safety and happiness, and results in profit.

## 4 Conclusions and recommendations

The aim of this report has been to give a review of the human resource situation within the maritime sector in Europe.

*We have shown that ...*

- The reason for the staffing problem on today's agenda within the maritime sector is mainly due to the experienced shortage of sea officers, i.e. lack of employees with core competences for taking responsibility for the navigation of the ships, which can be classified as the core activity of the sector.
- There doesn't seem to have been enough effort put in developing the human resource management competence within the sector as a whole, which is why there is now a lack of knowledge about how people working in the maritime sector deal with their working situation, and what career paths they follow and would prefer to follow.

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<sup>7</sup> This particular company has in August 2009 though, warned to move its headquarter to Denmark because of the government decision last spring not to introduce tonnage tax in Sweden.

- The offered educational possibilities need expansion, but such an expansion needs demand, and demand may rise only if work and career conditions develop and are made visible in ways which attract the new generations coming.
- A lot of the national and multinational/EU efforts during the last years concern regional and sector development, like promoting clusters of maritime activities. These clusters have produced increased innovation and productivity, and a kind of competition with a 'win-win-effect' for involved parties. Maybe, though, this development have increased the rate by which sea officers leave their work at sea, while enjoying land based promotion, close to home and family.
- HRM competence and strategic development may both gain and loose by the clustering effects. Industrial relations development and more local employer-employee-relations development are crucial for future development in the sector.

The European Union has invested resources in building up networks between organisations of practitioners and universities in order to promote research and development based on the problems of the practitioners within the maritime sector, while developing research competence on those.

An investigation on why those having joined some of the maritime education programs have done so, and how they imagine their future career to be, has started, as well as investigations on needs of recruitment and competence development within the land bases activities within the sector.

In practice 'attraction campaigns' have started all over Europe, in order to make visible the employment possibilities of the maritime sector. During May 2009, for example, there was a 'European Maritime Day' in at least 16 of the countries in the European Union. Those days are both directed at mutual meetings with core agents within the sector and at external activities vs. especially young people who might be interested in maritime education, and vs. media.

Without much knowledge about what is really happening within the sector, inside people working there, though, events in order to promote the maritime sector as a sector to work in might not reach its purpose.

*The suggestions from this report are thus as follows:*

- 1) Investigate the economies of the different phases of human resourcing within the sector. What are the costs for recruiting, developing and training (included the education the students bring with them as officers, pilots, etc), further training at work, and what are the turnover costs, and the costs for releasing? Can the economies of HRM be altered in order to promote retaining within the sector and the development of the sector?
- 2) Investigate the career paths of people already working in the maritime sector, those with and without education and training, and those staying and those having left and/or moved

around within the sector. What can be done to retain people within the sector in order to keep and develop scarce competence?

- 3) Investigate where in the sector people enjoy working. Where are they committed to develop themselves, as professionals, and the organisation and the maritime sector? Under what conditions do employees stay and produce with commitment, effectively?
- 4) Investigate and analyse HRM strategies and procedures within leading actors in the sector, both large and small, compare them and compare them in relation to trade unions strategies – and promote R&D on HRM issues within the sector to develop more competence at sea and ashore.

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### **Key Projects**

1. Lighthouse ([www.lighthouse.nu](http://www.lighthouse.nu))
2. WORKFRET (<http://cordis.europa.eu/transport/src/workfret.htm>): Working Cultures in the Face of Intermodal Freight Transport Systems
3. REWORD (<http://cordis.europa.eu/transport/src/reword.htm>): Research for Enhancement of work conditions aboard ships

### **Key journals, conferences/events**

1. International Labour Review
2. Maritime Policy & Management
3. International Human Resource Management
4. Journal of Human Resource Management

### **Key web sites**

1. European Community Shipowners' Associations (ECSA), [www.ecsa.eu](http://www.ecsa.eu)
2. EU Commission, DG TREN, [http://ec.europa.eu/transport/maritime/index\\_en.htm](http://ec.europa.eu/transport/maritime/index_en.htm)
3. EU Com., DG Fisheries and Maritime, [http://ec.europa.eu/maritimeaffairs/info\\_mat\\_en.html](http://ec.europa.eu/maritimeaffairs/info_mat_en.html)
4. [http://www.mif-eu.org/Leadership2015\\_2007\\_Progress\\_Report.pdf](http://www.mif-eu.org/Leadership2015_2007_Progress_Report.pdf)
5. <http://www.careers-at-sea.org/>
6. <http://www.itfglobal.org/>

## Attachment 1

### *Experiences from the Swedish Rail Administration (SRA)<sup>8</sup>*

The HRM function of SRA observed around ten years ago that many of their employees were near retirement age, and recruitment of new people to replace the old ones was necessary. Some groups lacked formal education, but possessed important practical experiences. How could their competence be transferred to the new generation?

The change project started in 2005. At that time they had investigated the demographic situation in Sweden, but they also needed to survey the situation of interested parties, so those were invited them to present their situation. They formed two fora, one for the rails and one for the administration, and everyone was asked to describe their possible contribution. The Rail Administration took the responsibility for the whole project.

The change project was divided in two parts, one for the internal circumstances and one for the external. The external was about education and training, which implied the Rail Administration taking responsibility for supervision and practice of traineeship for students of 5-6 upper secondary school. Education for Engineers aiming at rails started at Chalmers Technical University in Göteborg and at KTH in Stockholm.

As a way to attract the youths, informants visited schools to present education possibilities for the rail sector. They also created a website (<http://jarnvagsjobb.se>) with information about education and training, vacancies, traineeships, etc. At this website they also could find competitions and games directed to the future.

The internal circumstances concerned attitudes and how the employees could change their attitudes. Employees who had been in the rail sector long time, should be motivated with the right attitude when they met newly employed youths. The work with changed attitudes was divided in three aspects, identity, image and profile. A survey was sent to the employees on their opinions about the three aspects, with the purpose to awaken their pride of the Swedish Rail Administration. A dialogue about the three aspects started on the web, where the aspects were discussed.

Consultants of communication made the lion part of this change work. They produced policies and new values, and they also spread the importance of taking care of ones own development, i.e. to promote self guided activity.

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<sup>8</sup> The story in this attachment is based on an interview with a previous HR development manager at SRA, Per Thilander, who is now a PhD student at School of Business, Economics and Law at Göteborg University.

The Rail Administration was informed that it was necessary to change the internal and external circumstances at the same time. If they had changed one of them but not the other the whole project would be unsuccessful. They also learned that everyone must be convinced about the Swedish Rail Administration being a business for the future. People who work with this sort of project must be real enthusiasts, and the support from top management and planning department is imperative.

The change project of the Swedish Rail Administration is not yet finished. They believe their efforts have been rewarding, as their manning problems now are not that great, and people are more committed than before.