MAPPING MARITIME PROFESSIONALS

Towards a full-scale European data collection system

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SUMMARY

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Background

The maritime transport sector is a key component of European economic development and growth. It is also central to the livelihoods of hundreds of thousands of seafarers, as well as countless more people involved in the sector more widely and in the supply and supporting industries with which it is connected. Despite this, there are currently no reliable, standardised data to describe and monitor the European maritime labour market.

This gap, and its significance for the maritime sector, have been recognised for some time (Task Force 2011). Accurate, reliable data are essential to the development of appropriate strategic responses to the problems and challenges the industry faces. Perhaps the most pressing of these, in the European context, is the retention of seafarers. However, the global Covid-19 pandemic, during which the study described in this report was carried out, has highlighted the difficulties faced by seafarers during their daily working lives, as well as the challenges and pressures facing shipping companies. As such, it has further underlined the importance of a rigorous understanding of the labour market as a basis from which to support seafarers, shipping companies and the maritime sector more widely.

It is now 10 years since DG MOVE set up a Task Force to consider the relationship between employment in the maritime industry and competitiveness, with a view to making recommendations on the social aspects of the European maritime policy. The Task Force had "major difficulties" in obtaining accurate, complete and reliable figures on employment in the sector. It pointed to "the lack of available data in most countries, and for some of them of no existing data at all", and recommended that a harmonised data collection system on seafarers' employment be set up.

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The European Transport Workers' Federation (ETF) and the European Community Shipowners' Associations (ECSA) are currently working together to consider how accurate, reliable and standardised data on the industry's workforce at the European level might be obtained. As part of this process, they commissioned the Cardiff University Seafarers International Research Centre (SIRC) to carry out the study described in this report. Its aim was to map existing data sources across the EU, and consider examples of good practice, limitations to current data collection and issues of transferability. This mapping was intended to

form the basis from which practical protocols on how a robust and reliable EU-wide data collection system might be developed.

Methodological approach

The project was carried out in two Phases.

Phase 1 was an in-depth desktop review. Its aim was to identify existing datasets and possible sources of data on seafarer numbers both within each EU Member State (as well as Iceland, Norway and the UK), and at the EU and international levels. Each identified source was explored to consider:

- The extent to which its data covered a set of key details on seafarers, including:

  - sex, age, nationality, rank, certificate details, multiple certificates, working at sea and being an active seafarer.

- Any limitations within the data in relation to its potential for providing a detailed and accurate picture of the seafaring workforce.

Searches and exploration of potential sources were carried out online. Where this did not yield sufficient information to consider the points above, data holders were approached directly.

Phase 2 comprised case studies in six Member States: Germany, Greece, the Netherlands, Spain, Sweden and the UK. These countries were selected in consultation with ECSA and ETF and were intended to reflect both geographical balance and key suppliers of masters and officers, which are currently in short supply in the European maritime labour market (EMSA 2018). In-depth interviews were conducted with representatives of the organisations identified during Phase 1 as the holders of relevant data within each of the

six case study countries. The interviews were intended to develop a deeper understanding of the participating organisations and the data they held.

Taken together, Phases 1 and 2 were designed to 'map' existing data on seafarer numbers in the EU and further understanding of both limitations and examples of good practice within the identified data sources.

Findings

The study identified and explored 93 data sources across 30 countries. These fell into three main types:

- Systems holding details of seafarer certification.

- Broader systems intended to collect employment data across a range of sectors (often based on Labour Force Surveys and available through national statistics agencies).

- Social security systems which administer income, disability and retirement benefits and some tax contributions.

The detailed review of these sources suggested a mixed and complex picture. Within each of the three types of data source, there is a wide range in terms of public accessibility, coverage, detail and specificity. However, each data source type is also limited, to a greater or lesser extent, in the degree to which it can contribute to a clear and accurate description of the maritime sector's workforce. Broadly:

Strategic planning and policy development require robust data that are comparable across countries and over time

- Systems holding certification data collect a range of seafarer details but for the most part cannot distinguish whether a seafarer is active at sea or not.

- Employment based data sources rarely hold seafarer specific data.

- Social security systems that are specific to seafarers often hold relevant data, but these arrangements are not universal across Member States, hold particularly sensitive data, and may not cover all national seafarers.

Further, where detailed information is available at the national level, this is often dependent on particular contexts, settings and arrangements within that Member State. In addition to more specific national contexts, traditions and situations, and as well as cross-national arrangements and agreements, these key contexts were broadly two-fold:

- Strong traditions of seafaring

  - Where this is the case, countries more often have specific arrangements that allow particularly comprehensive and fine-grained data collection on an ongoing basis.

- Strong traditions of co-operation between the social partners and/or other key stakeholders

  - Where this is the case, countries more frequently have collaborative arrangements in place that allow detailed data collection and monitoring, often bringing together information from a range of sources to build up a more in-depth and accurate picture.

This context-specificity makes the wholesale transfer of data collection arrangements from Member State to Member State particularly difficult to successfully and effectively achieve.

In keeping with earlier work (Task Force 2011; Sulpice 2011), therefore, our findings suggest that publicly available data cannot be used as they stand to draw a detailed map of employment in the maritime sector across the EU because of the range of limitations inherent in each of their arrangements. This is primarily because of the widespread variation in their accessibility and the fact that none of the data sources which hold information on seafarers at the Member State level has, as its core function, the production of a detailed map of the seafaring labour force. In addition, however, data are often collected, categorised, stored, adjusted and checked in ways that make comparisons between sources, groups of seafarers, or countries, or over time, as well as the collation of data from a range of different sources, difficult or impossible to achieve.

Nevertheless, this understanding of existing data sources and their limitations, together with the exploration of examples of good practice and the contexts in which such practices develop, provide the basis from which protocols for the development of a robust and reliable EU-wide data collection system might be developed.

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Conclusions

Strategic planning and policy development require robust data that are comparable across countries and over time. The rapid pace of change within

the maritime sector also makes it particularly important that such data are as current as possible. Our findings indicate that certification data must be the foundation of any EU-wide system. They also suggest that an agreed set of consistently presented details on seafarers made publicly available by all administrations would allow the comparisons over time that are not currently possible. However, this dataset would have a remaining limitation: it would include all those with current certificates, whether or not seafarers were actively working at sea. This study suggests two possible approaches to addressing this limitation. First, an adjustment could be made to take account of the estimated number of such individuals within each administration's dataset. This adjustment would need to be made on a consistent, transparent and accurately reliable basis across the EU, and should be regularly reviewed to ensure it continued to reflect the current situation. Second, certificate details could be linked with tax or social security records, so giving an up-to-date and accurate indication of whether or not seafarers are actively working at sea. The second of these approaches would, of course, be more accurate but is more difficult to achieve.

Our findings also suggest that a central role in the planning and development of any EU-wide data collection system for the sector's social partners, with key stakeholder support, would be key to ensuring both appropriateness, usefulness and sustainability. In particular, their involvement would be fundamental to ensuring that the three underlying requirements for a fully functioning and effective system were achieved and maintained. These include agreement on: the definitions of 'a seafarer' and an 'active' seafarer; a key set of publicly available certificate details; and a methodological approach for adjusting or adding to these data so that they more accurately reflect those actively working at sea, as well as their consistent collation, aggregation and prompt, regular and full publication.

Such a system would allow the assessment and monitoring of trends and changes in a range of key aspects of the sector, including:

- the sustainability of the EU maritime workforce across the cluster

- the education and training needs of seafarers

- the sustainability of the seafaring profession, including in relation to younger and female seafarers

In addition, an on-going data collection system would be readily adaptable to meet other needs and to allow independent research. The Covid-19 pandemic has highlighted how rapidly the sector needs to be able to react to change and unexpected developments to protect the wellbeing and livelihoods of its workforce. The findings described in this report provide the basis from which protocols might be developed for a system which would contribute to social partners' strategic approaches and policies for the sector, leaving them better placed to respond decisively and appropriately to future developments, and even crises, within the industry.

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