

**MARE FORUM**

AD REPERIENDAM VERITATEM



MARE FORUM  
1ST  
MARE FORUM  
PANAMA  
2016

Panama, the Singapore of  
the Western Hemisphere

24 JUNE 2016  
PANAMA CITY

# PANAMA

The Singapore of the Western Hemisphere

## Session 2: Panama as Financial and Shipping Centre Opportunities – Innovations

### *The Human Factor Imperatives*

Captain Orlando Allard

MareMundi Consulting Inc.

Panama, 24 June 2016



**Mare Forum**

**Panama: The Singapore of the Western Hemisphere**

# ***The Human Factor Imperatives***

## ***Agenda***



**Labour Structure of the Panamanian Logistics Sector**



**Panama as a Logistics Hub**



**Human Resources Requirements – Shipping & Logistics**



**Availability of Human Resources: Training**





# Panama: Logistics Platform



Zona Libre de Colón



EVERGREEN CONTAINER TERMINAL

PUERTO DE CRISTOBAL



PUERTO DE CRISTOBAL

MANZANILLO CONTAINER TERMINAL



AEROPUERTO FRANCE FIELD

TOCUMEN Airport



FERROCARRIL DE PANAMA

Aeropuerto Albrook



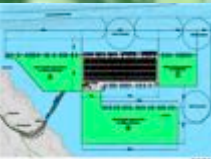
Red de fibra óptica



PUERTO DE BALBOA

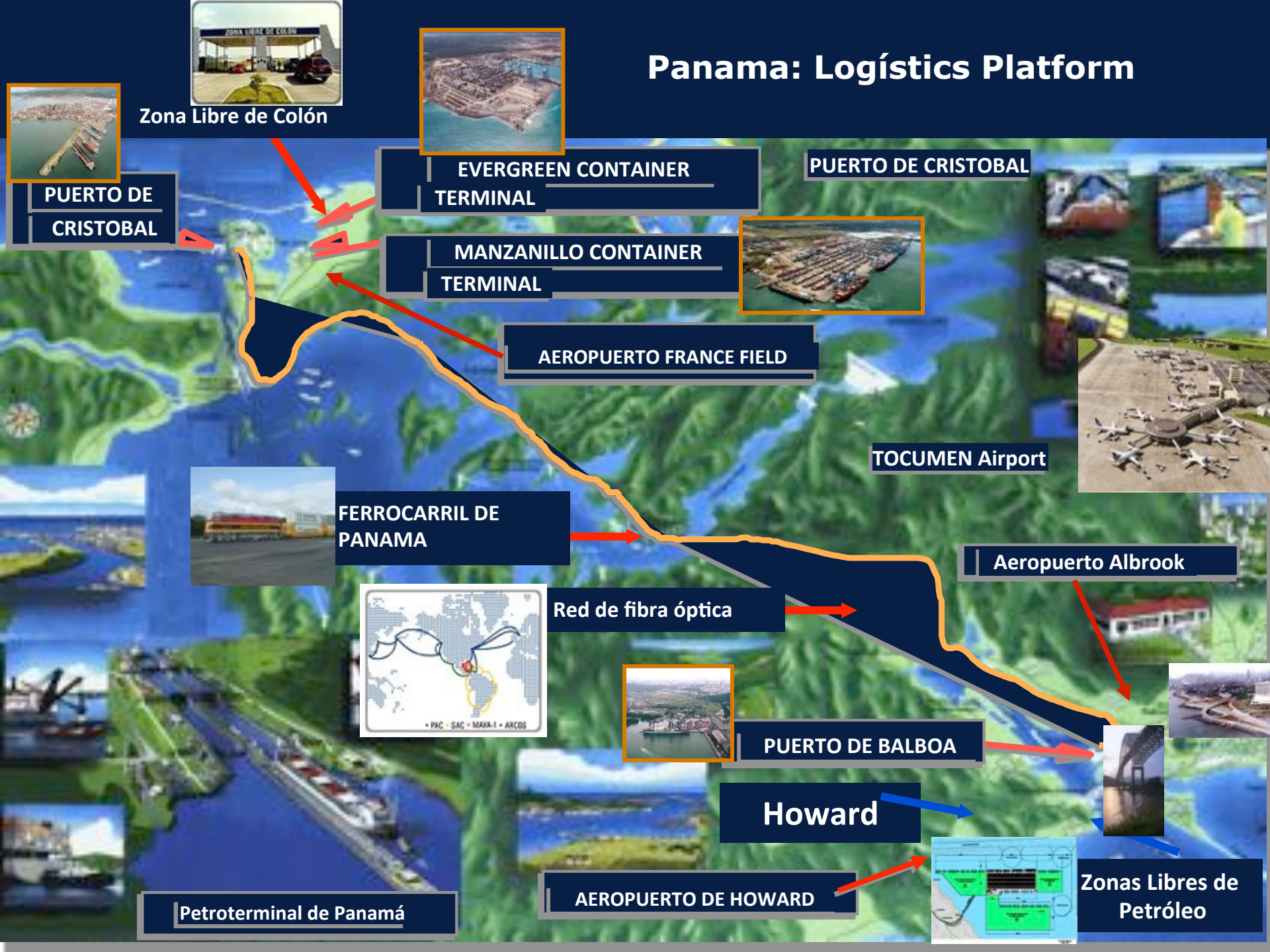
Howard

AEROPUERTO DE HOWARD



Zonas Libres de Petróleo

Petroterminal de Panamá













**BIMCO**

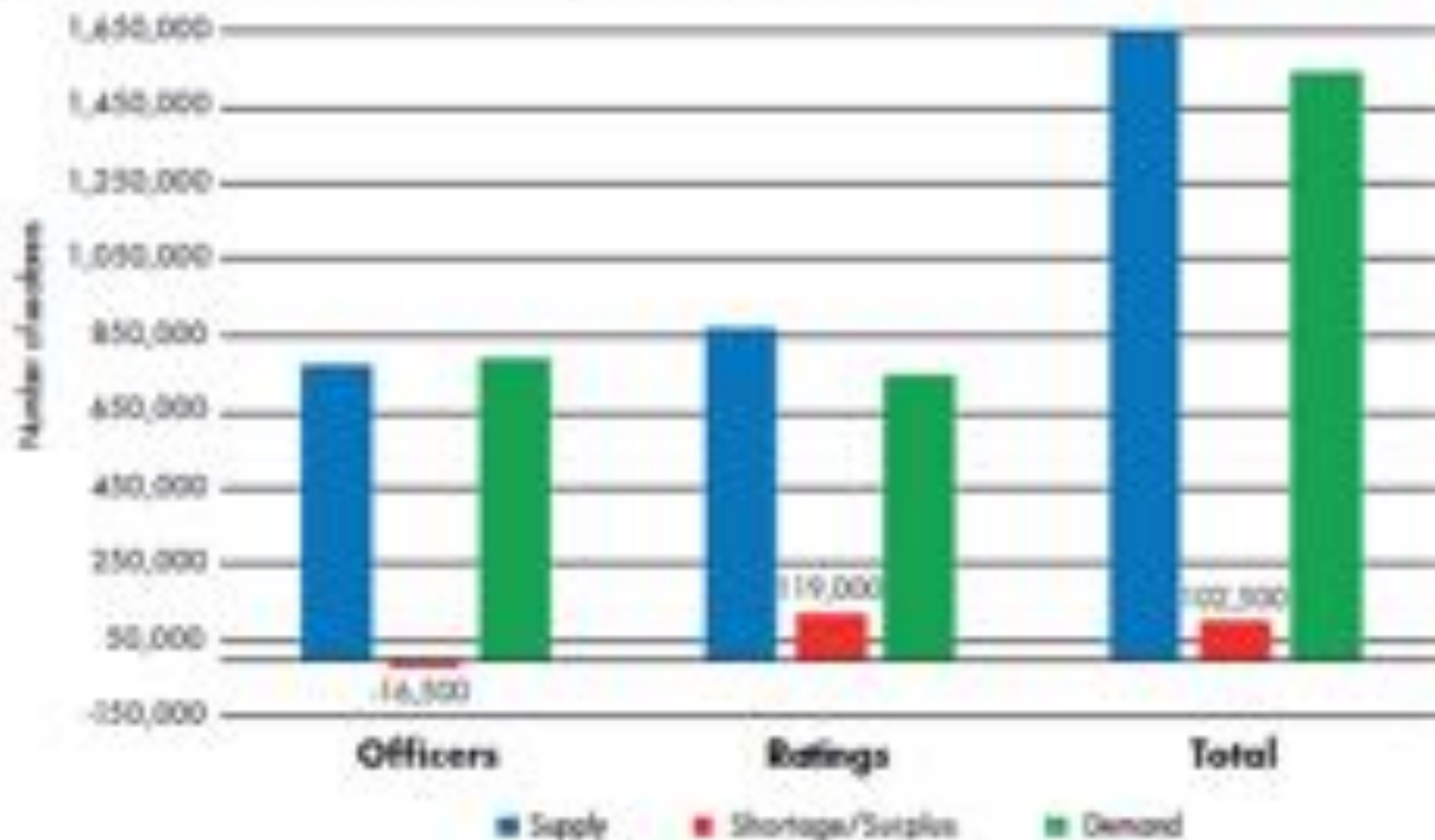


# **MANPOWER REPORT**

The global supply and demand for seafarers in 2015



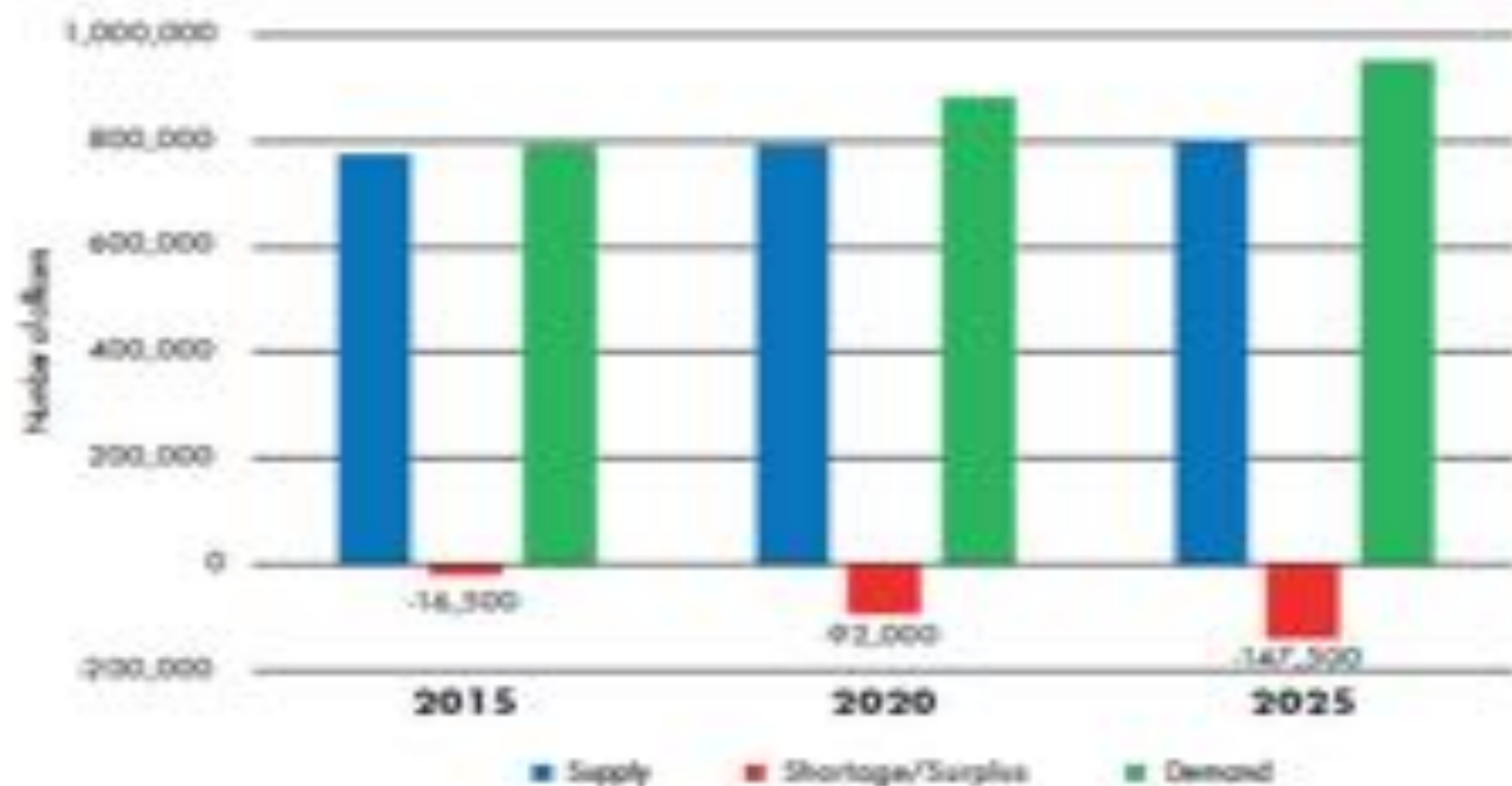
## Current estimated global supply and demand of seafarers



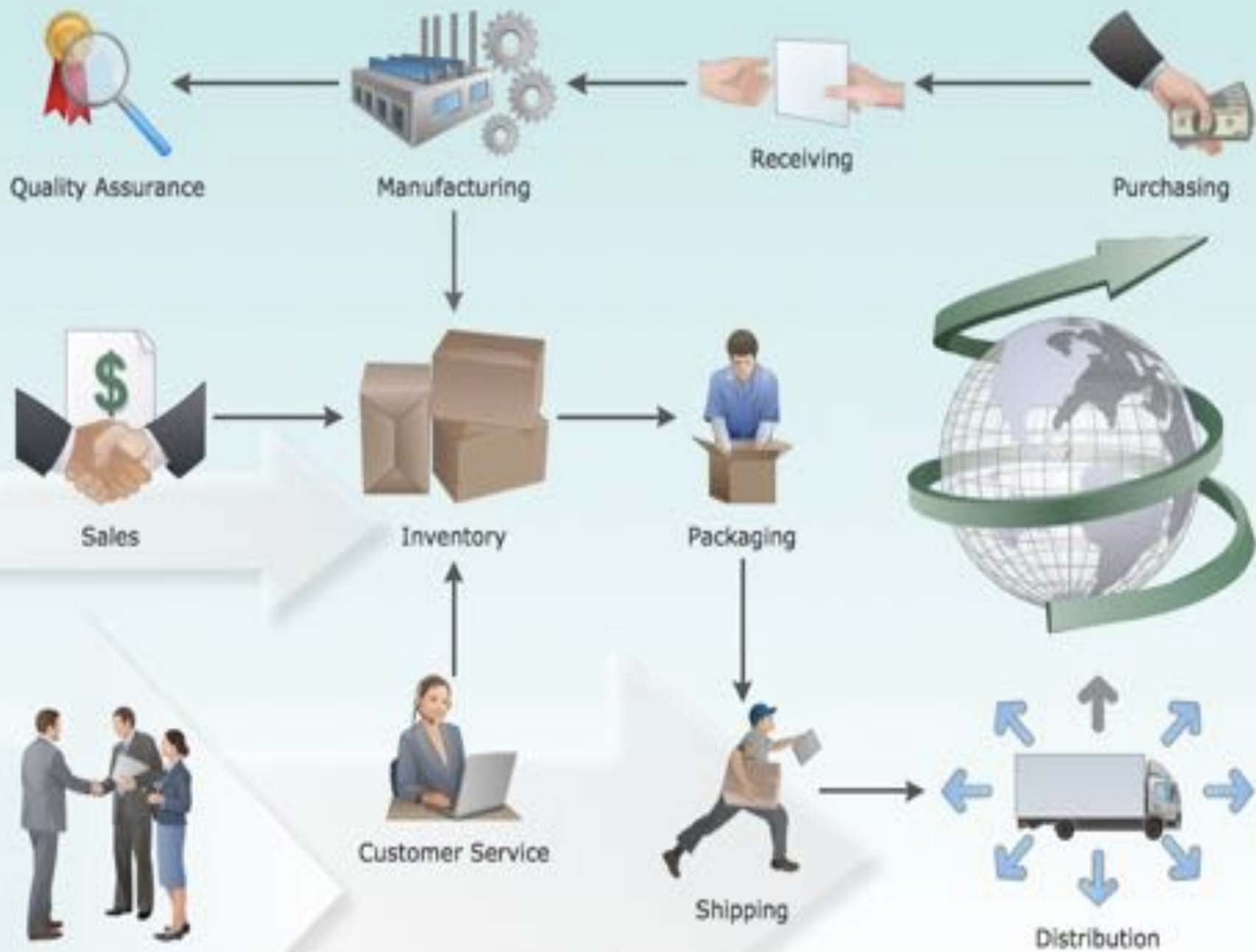
The current supply-demand situation is a shortage of 16,500 officers and a surplus of 119,000 ratings, with an overall surplus of 102,500 seafarers.



### Basic forecast for the future supply-demand balance for officers



| ESTIMATED SUPPLY-DEMAND BALANCE FOR OFFICERS |         |         |          |
|--|---------|---------|----------|
|  | 2015    | 2020    | 2025     |
| Supply                                       | 774,000 | 789,500 | 805,000  |
| Demand                                       | 790,500 | 881,500 | 952,500  |
| Shortage/Surplus                             | -16,500 | -92,000 | -147,500 |
| %  | 2.1%    | 11.7%   | 18.3%    |

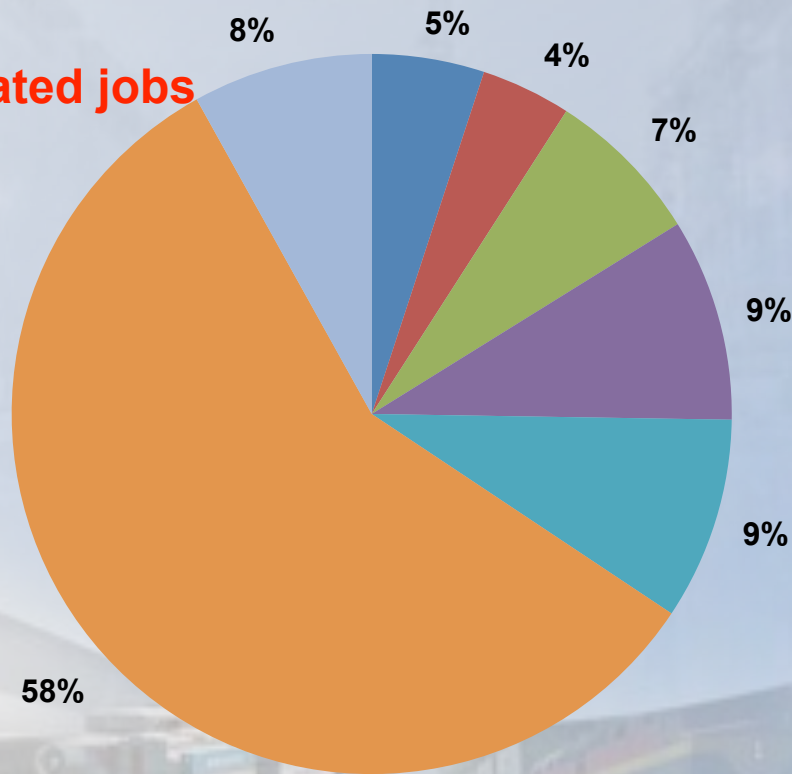




# Labour Structure of the Panamanian Logistics Sector 2014

- Directores
- Empleados de oficina
- Trabajadores no calificados
- Profesionales
- Vendedores
- Técnicos medios
- Operarios y ayudantes

- 124,829 logistics-related jobs
- 86% urban
- 87% male



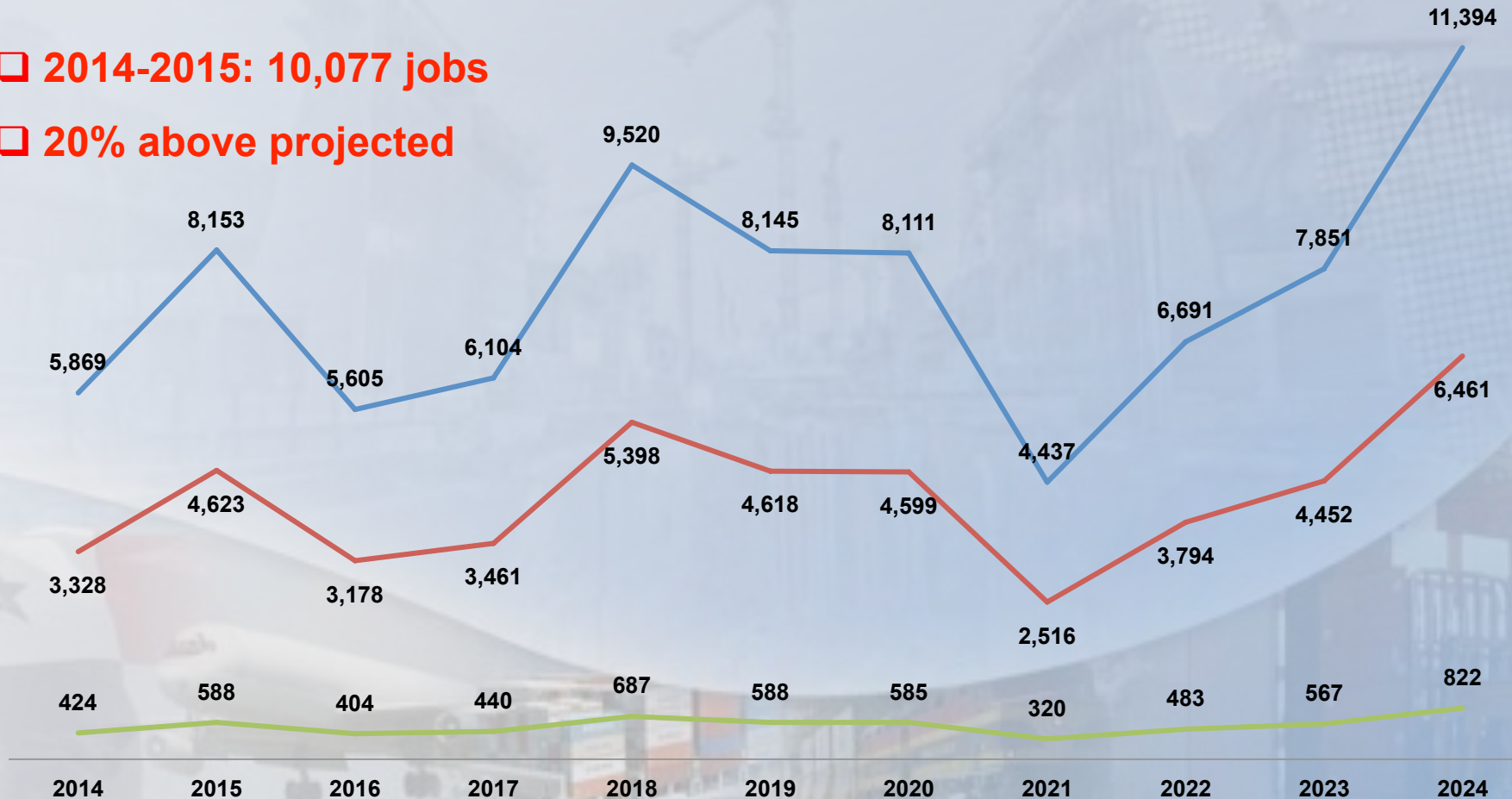
**Operators, helpers, mid level technical and non certified workers: 74%**

# Technical Job Generation in the Logistics Sector 2014-2024

— Nuevos empleos — Nuevos operarios — Nuevos técnicos medios —

❑ 2014-2015: 10,077 jobs

❑ 20% above projected

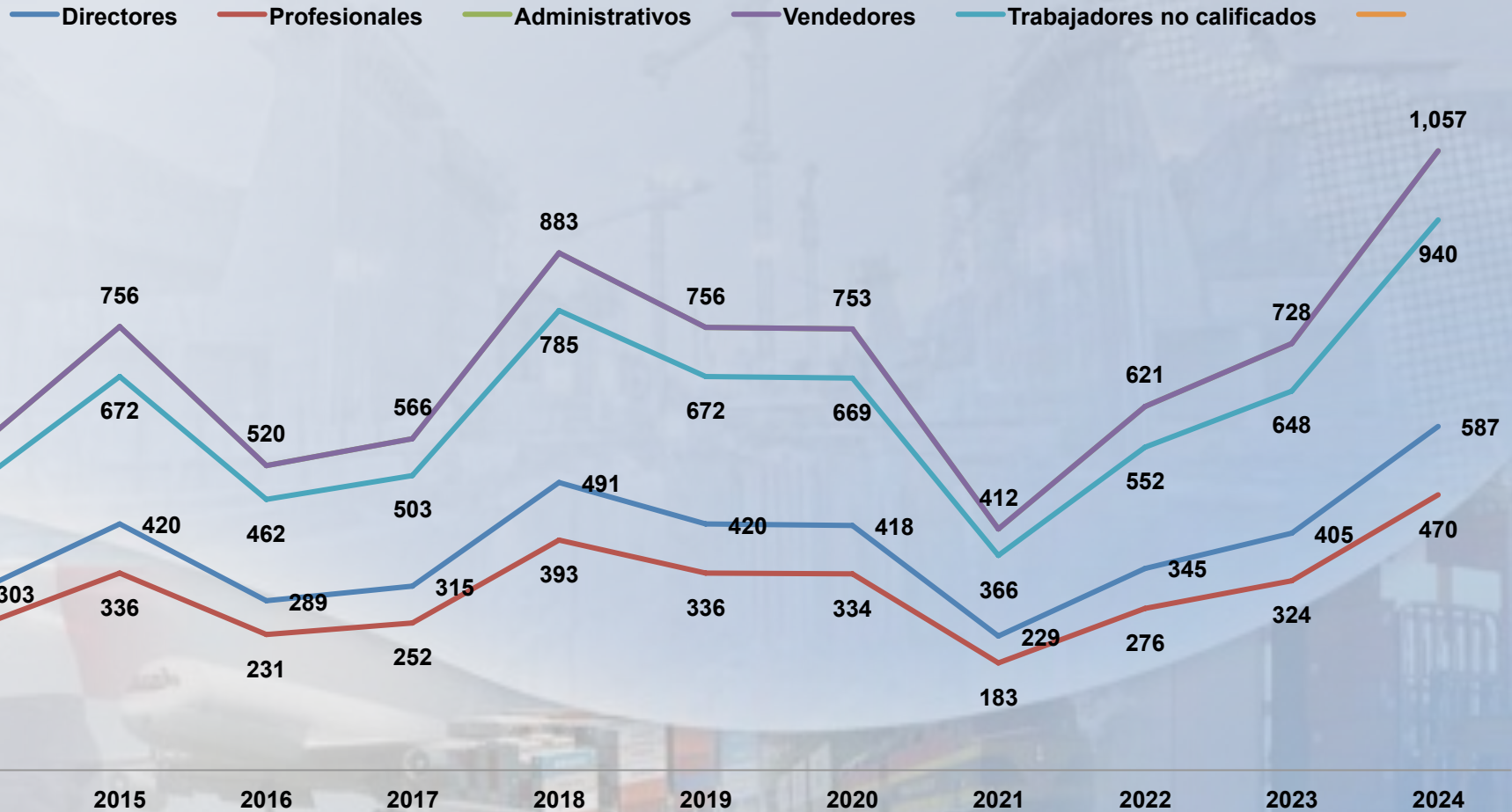


## Fuentes:

- Histórica (PIB, PIB logístico, empleo): INEC, Contraloría General de la República
- Proyección de PIB: Pronósticos del Producto Interno Bruto 2011-2015, Autoridad Nacional de los Servicios Públicos (ASEP)



# Non Technical Jobs Projected Growth in the Logistics Sector 2014-2024



## Fuentes:

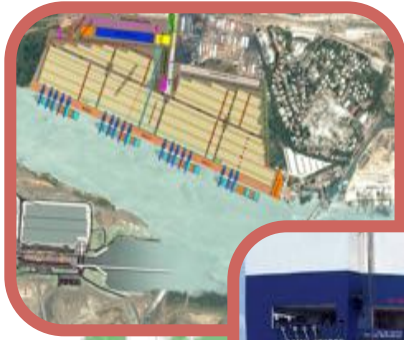
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- Proyección de PIB: Pronósticos del Producto Interno Bruto 2011-2015, Autoridad Nacional de los Servicios Públicos (ASEP)

# Panama Canal Additional Business Areas

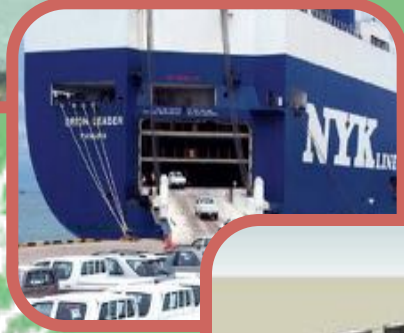
**Electricity Generation**



**Mar Caribe**

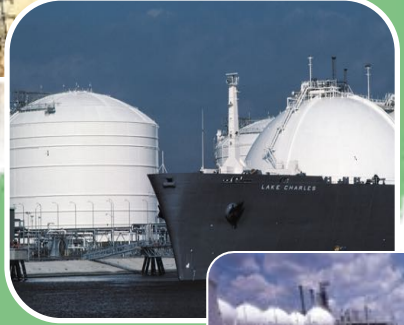


**Corozal Container Terminal**



**RoRo Terminal**

**LNG Terminal**



**Pipeline**



**Ship Repairs**



**Logistics Park**



**Bunkering**

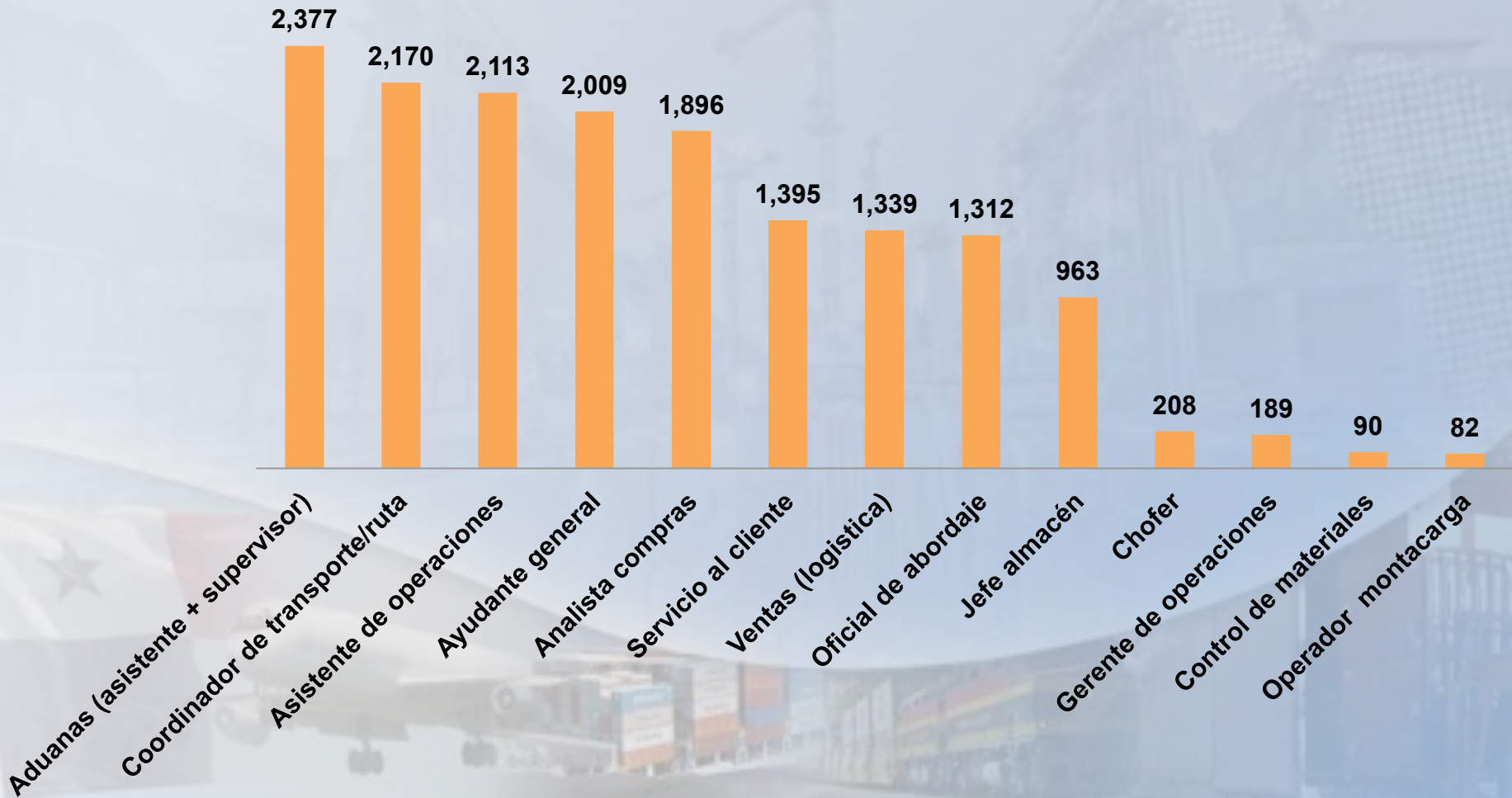
**Top-Off Operations**



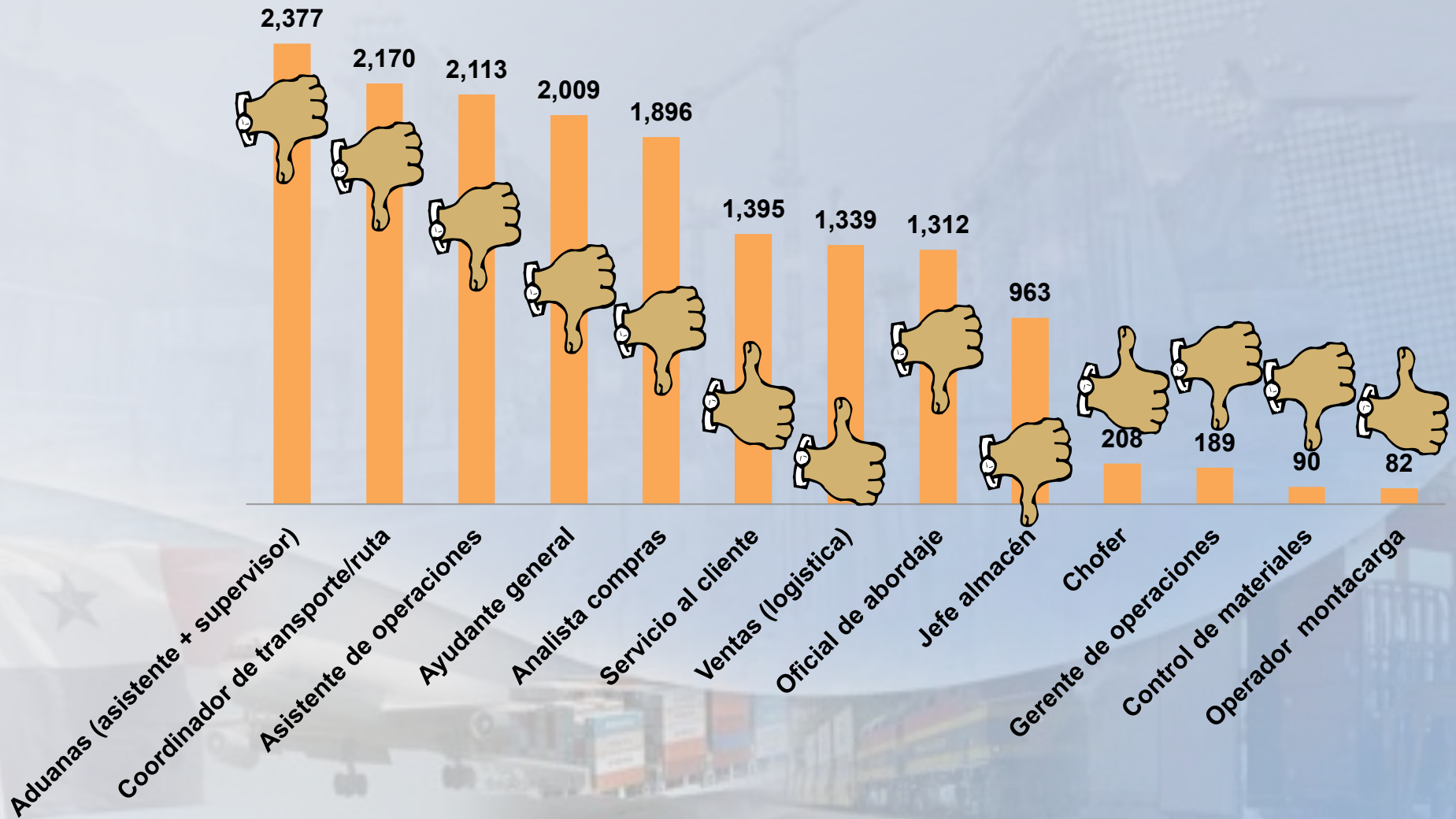


## Vacancies in the Logistics Sector

[www.panamaemplea.gob.pa](http://www.panamaemplea.gob.pa) (16,143)



## Training Offer Available per Job Vacancy



There are not training programmes for 70% of vacancies

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# *The Human Factor Imperatives*

## *Availability of Human Resources*



2014 – 2024: 84,000 plus jobs



65% of these jobs are technical jobs



70% of job vacancies with no training offer



We have 110,000 young men/women who do not work and who do not go to school (Ni-Nis)



Every year we graduate from college over 22,000 youngsters



Most students who graduate from highschool prefer traditional careers, such as law, engineering and architecture...



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# *The Human Factor Imperatives*

## *Imperatives*



**Identify logistics requirements – number and competencies**



**Identify available human resources**



**Implementation of comprehensive training programmes**



**Work with private sector – technical & social competencies**



**Understand “millennials” – The new labour force**



**Response from Public & Private Sectors: Logistics Cabinet, INADEH, COSPAE, ITS, IPT, Universities...**



**Train, train, train...**

# II FORO EMPRESARIAL COSPAE

Impulsando el desarrollo educativo

Consejo del Sector Privado para la Asistencia Educativa  
**EMPLEOS : EMPRESAS  
SOSTENIBLES : EMPRESAS  
COMPETITIVAS**

Aliados



**CONFERENCISTAS  
EXPERTOS INTERNACIONALES**  
REPRESENTANTES DE SECTORES PÚBLICO Y PRIVADO

PRESENTACION DEL LIBRO  
**"EMPRESAS PARA CRECER"**

Orden  
**RENE DE LIMA**

Honorable  
Señor Ingeniero Herman Bern

## EJES TEMATICOS

Bareras para la  
productividad Empresarial

Formación Dual y su papel en la formación  
profesional y técnica de los jóvenes

Inversión en formación del capital humano:  
Análisis de necesidades, Pertinencia de la Formación

Insersión y Sostenibilidad del empleo:  
La nueva fuerza laboral

**03 AGOSTO 2016** HOTEL  
SHERATON PANAMA

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*iGracias!*

Captain Orlando Allard

MareMundi Consulting Inc.

Panama, 24 June 2016

