



Navigate Your Career and Business with the 2004 Environmental Labour Market (ELM) Report

**CEAA Technical Conference
October 2005**



Summary

- About ECO Canada
- Environmental Labour Market
- ECO Canada Products and Services



ECO Canada

- Established in 1992
- Designated sector council
- Addressing human resource challenges facing the environment sector



ECO Canada Mission

“To ensure an adequate supply of people with demonstrated skills and knowledge required to meet the environmental human resources needs of the public and private sectors”



ECO Canada User Groups



Practitioners



- Career information
- Job board
- Certification
- Skills development
 - Training
 - Conferences

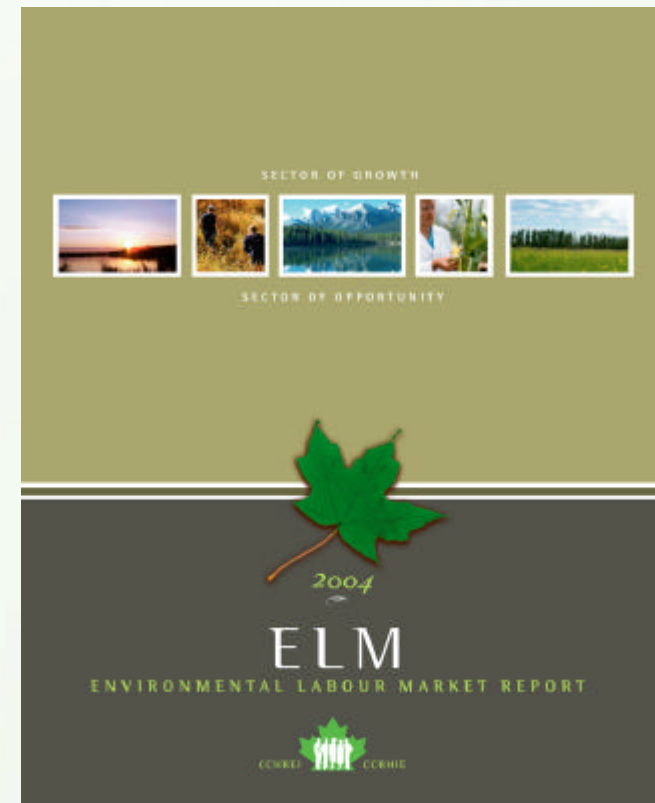
Employers



- Job Board
- HR Planning Centre
 - Employer's Guide
 - Recruitment
 - Retention

2004 Environmental Labour Market (ELM) Report

- Employment Trends
- Human Resource Needs
- Emerging Opportunities
- Future Challenges





How ELM Can Benefit You?

Employers

- Recognize employment trends
- Identify emerging opportunities and challenges
- Make informed decisions about human resource strategies

Practitioners

- Choose viable career paths
- Identify strategic professional development opportunities
- Stay informed about emerging employment opportunities



2004 Environmental Labour Market (ELM) Report

Key Findings



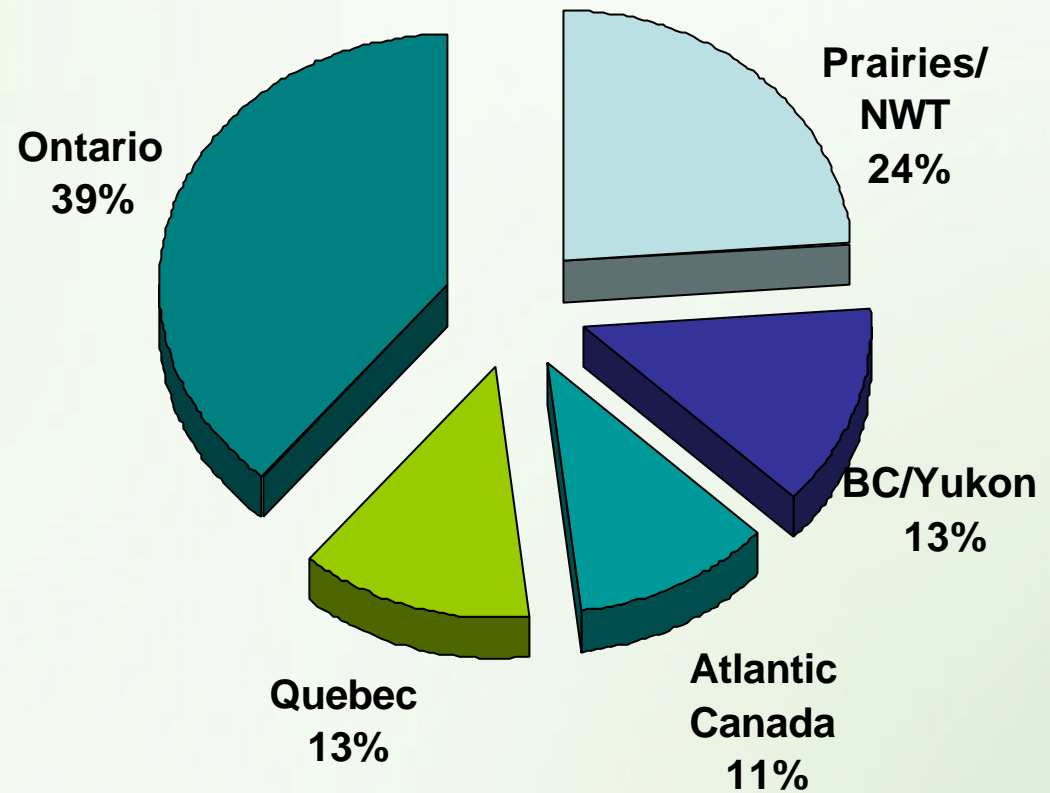
Canada's Environment Sector: At a Glance



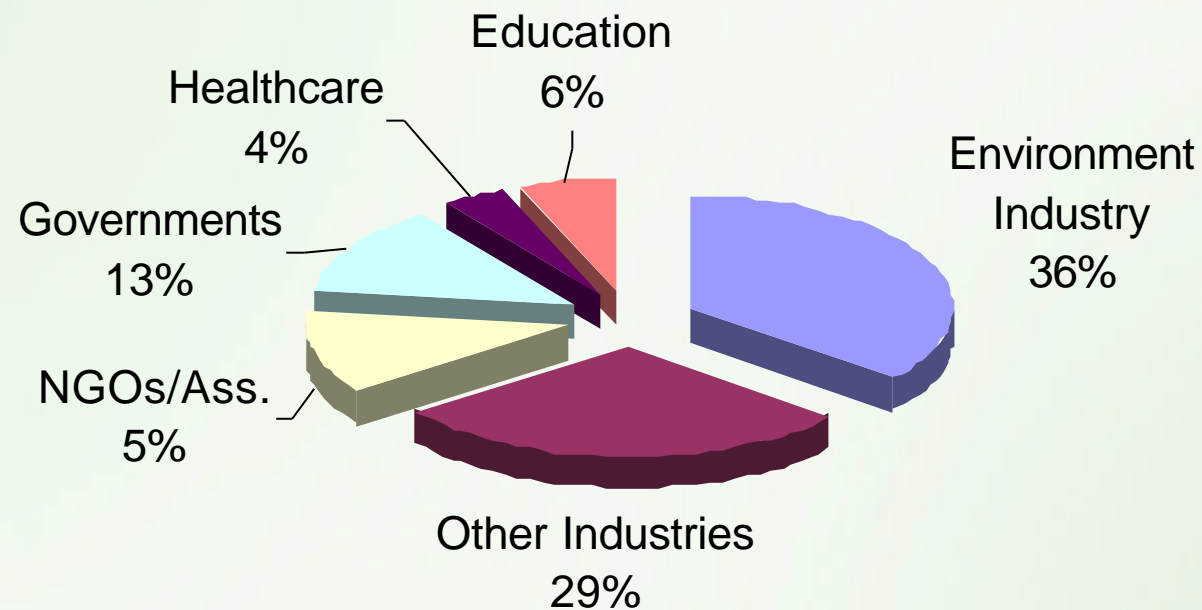
Environmental Workforce

	<i>Environmental Practitioners</i>	<i>Support Staff and Labour</i>	<i>Total Environmental Workforce</i>
Private Sector			
Environment Industry	59,800	39,900	99,700
Other Industry	48,100	16,200	64,300
NGOs	19,900	11,900	31,800
Sub-total	127,800	68,000	195,800
Public Sector			
Government	21,600	8,500	30,100
Health	6,600	5,100	11,700
Education	10,000	3,400	13,400
Sub-total	38,200	17,000	55,200
Total	166,000	85,000	251,000

Distribution of Environmental Practitioners by Region



Distribution By Organization Type





Top Ten Activities Undertaken by Environmental Practitioners

- Water Testing, Monitoring, Management, Pollution Abatement, etc. - 45%
- Waste Management/Collection/Treatment/Disposal – 39%
- Environmental Training and Education - 39%
- Communications and Public Awareness - 36%
- Site Remediation, Restoration, and Reclamation - 31%



Top Ten Activities Undertaken by Environmental Practitioners continued

6. Development of Environmental Policies/Legislation & Compliance Monitoring - 30%
7. Environmental Protection - Integrated Management - 30%
8. Environmental Research and Development - 29%
9. Land Quality and Soil Contamination - 29%
10. Health and Safety, Industrial/Occupational Hygiene - 28%



Organizations Recruiting Practitioners (By Sector)

Reported Vacancies by Organization Type, 2003	Public Sector	Environment Industry	Other Industries
Current Vacancies	18%	31%	26%



Size of Organizations

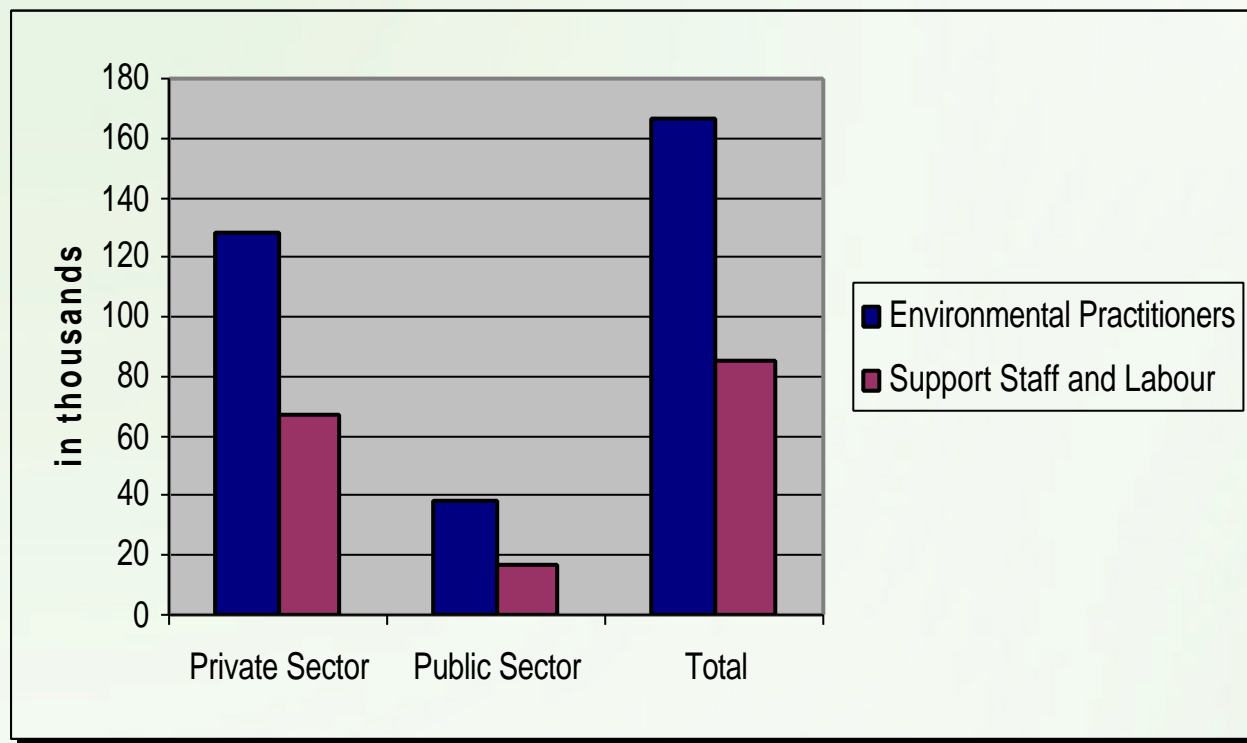
	<i>Public Sector</i>	<i>Environment Industry</i>	<i>Other Industries</i>
Sole proprietor	2%	13%	9%
2 to 10 employees	18%	45%	38%
11 to 50 employees	25%	31%	27%
51 to 200 employees	19%	6%	13%
201 to 500 employees	9%	2%	5%
Over 500 employees	27%	3%	8%
Total Number of Organizations	(1,900)	(4,050)	(3,250)

***74% of organizations employ 50 employees or less**



Current Trends in Environmental Employment

The Environment Profession is Growing



1999

- 102,000 environmental practitioners
- 221,000 environmental workforce

2003

- 166,000 environmental practitioners
- 251,000 environmental workforce

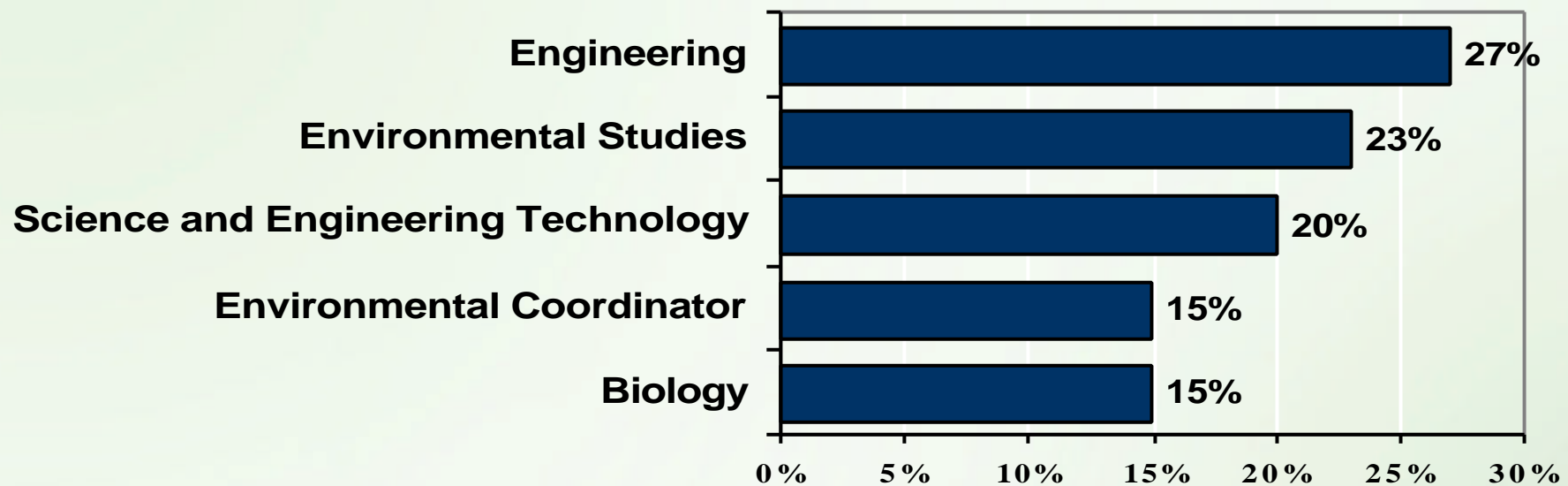


Increase in Estimated Number of Vacancies (2003)

Occupational Group	Current Vacancies	
Management Positions	1,690	(12%)
Non-Management Positions	10,150	(88%)
Total Vacancies	11,840	(100%)



Top 5 Backgrounds/Occupations Hired Between 1997 and 2002



% of Organizations Employing Environmental Practitioners



Increased Level of Education

(Management and Non- Management Combined)

	Public Sector	Environment Industry	Other Industries	Environmental Practitioners with Post-Secondary Education
University Degree	62%	68%	69%	67%
College Diploma/CEGEP	38%	32%	31%	33%

Note: 13.2% of total environmental practitioners do not hold a university degree or college diploma



Increasing Female Participation

Gender	Public Sector	Environment Industry	Other Industries	TOTAL
Female	38%	38%	33%	36%
Male	62%	62%	67%	64%

* 25% female participation in 1999



Growing Demand for Environmental Practitioners by 2006

<i>Occupational Group</i>	<i>Employment in 2003</i>	<i>Employment in 2006</i>	<i>Difference</i>
Management Positions	40,450	47,000	6,550 (+16%)
Non-Management Positions	125,500	146,000	20,450 (+16%)
TOTAL	166,000	193,000	27,000 (+16%)



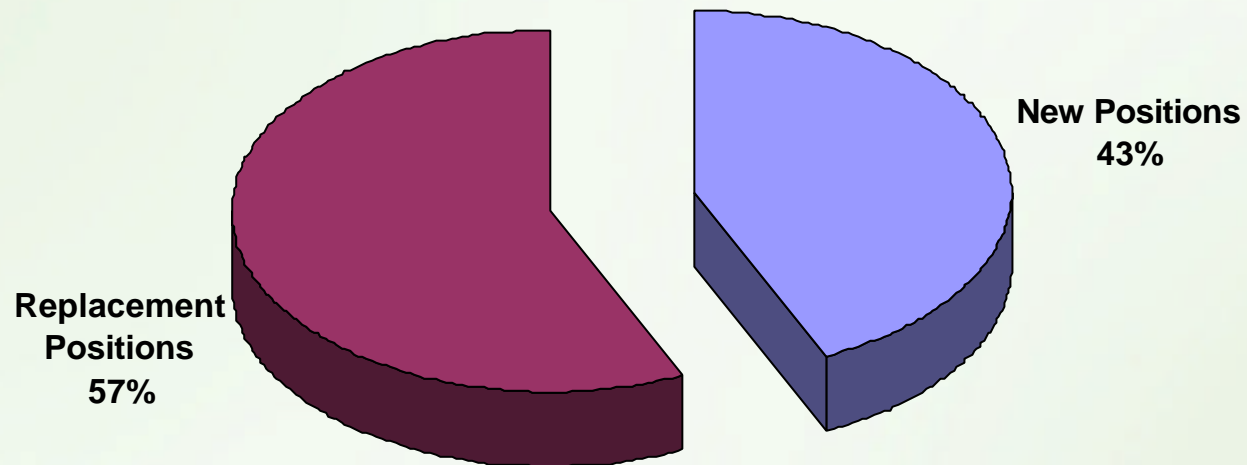
Recruitment Methods Used by Organizations

Recruitment Methods	Public Sector	Environment Industry	Other Industries	All Organizations
Personal Contacts	32%	55%	57%	52%
Newspapers, Trade Journals	58%	37%	46%	45%
Resumes on File	30%	45%	39%	39%
Electronic Bulletin Boards/Job Banks/Internet	42%	43%	33%	39%
Co-op Programs	19%	27%	21%	23%
On-Campus Recruitment	15%	25%	19%	21%
Human Resource Centres	23%	22%	14%	19%
Internal Company Searches	21%	11%	17%	15%
Professional Recruitment Agencies	3%	11%	9%	8%
Other Methods	12%	6%	7%	8%



Emerging Issues in Environmental Employment

Environmental Practitioners Hired in 2002 as Replacement Positions





Training & Upgrading Skills

Six Most Frequently Cited Skills and Topic Areas in Which Training or Upgrading is Required

Communicating Effectively	53%
Project Management Skills	53%
Planning and Organizing Work and Projects	50%
Computer Proficiency	40%
Critical Thinking/Judgement	38%
Policy, Legislation and Regulations	36%



Retirement & Succession Planning

Presence of Succession Plan	Public Sector	Environment Industry	Other Industries	All Organizations
Yes	37%	28%	31%	31%
No	47%	59%	56%	55%
No Reponse/No Opinion	16%	13%	13%	14%



Summary Current Trends

- Growth in the Environment Sector

Trend	1999	2003
Growth in workforce	221,000	251,000
Increase in number of environmental practitioners	102,000	166,000
Increase in number of organizations	9,550	10,100



Summary Current Trends

- Opportunity in the Environment Sector

Trend	1999	2003
Increase in vacancies	4,200	11,840
Increase in future demand	9,000 (14%)	27,000 (16%)
Increase in level of education (university degree)	55%	67%
Increase in female participation	25%	36%



Summary Emerging Issues

- High percent of replacement positions
 - 57% in 2003 - turnover & retirement
- Gap in mid-experience positions (5-10 years)
 - Lack of succession planning
- Training & Upgrading needed in transferable skills



Summary Emerging Issues cont'

- Difficulty recruiting experienced people
 - 15% in 1999 to 23% in 2003
- Lack of managerial skills
 - 7% in 1999 to 18% in 2003
- Lack of technical specialists with environmental skills
 - 10% in 1999 to 16% in 2003



Labour Market Trends & Issues

- Growth in environmental employment
 - 27,000 positions by 2006
- Increased level of education
 - 67% of environmental practitioners hold university degree



Labour Market Issues cont'

- Transferable skills sets need training & upgrading
 - Short courses & in-house training commonly used
 - E-learning an alternative for smaller organizations
- Increased recruitment in the following fields of study:
 - Engineering
 - Environmental Studies
 - Science and Engineering Technology
 - Environmental Coordinator
 - Biology



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