



STRATÉGIE MARITIME

THE MARITIME STRATEGY
BY THE YEAR 2030

2015-2020 ACTION PLAN



Version 1.00 – June 29, 2015

The summary and the unabridged version of the *Maritime Strategy* are available on the **strategiemaritime.gouv.qc.ca** website.

Cover photo

Josiane Briand, graduated in Navigation
Courtesy of the Institut maritime du Québec

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STRATÉGIE MARITIME

Unabridged version



MESSAGE FROM THE PREMIER

Québec's prosperity hinges on the creativity and boldness of its workers and entrepreneurs. It also stems from the development of its assets and the realization of projects that create quality jobs, protect the environment and engender direct spinoff in our communities.

The St. Lawrence River is one of our key assets. From its source in the Great Lakes to its mouth, the St. Lawrence River spans 3 200 km and its estuary is 65 km wide.

Our government is the first in Québec's history to propose a *Maritime Strategy*, which seeks to preserve the biodiversity of our maritime ecosystems, create worthwhile jobs in our regions and make Québec a transatlantic trade hub.

It will enable Québec to take advantage of a context in which business opportunities will proliferate in the coming years. The implementation of the *Canada and European Union Comprehensive Economic and Trade Agreement* that will ultimately eliminate trade barriers will lead to broader maritime trade. Access to the interior of the North American continent through the St. Lawrence River and the St. Lawrence Seaway offers an undeniable advantage for European businesses wishing to broaden their operations in Canada or the United States.

The expansion of the locks in the Panama Canal will also change trade flows for the benefit of east coast ports.

The *Maritime Strategy* will help to develop the fishing industry and maritime tourism. It will encourage scientific research, the development of maritime expertise, consensus building in communities and the responsible development of the St. Lawrence River. Accordingly, like Québec, it will affirm the indissociable nature of the economic, social and environmental dimensions of sustainable development.

I invite all partners in the maritime sector to benefit from the numerous opportunities that the *2015-2020 Action Plan of the Maritime Strategy* offers. We also invite all Quebecers to make the most of the full potential of the resources that our vast maritime territory offers. Let us work together to fully take advantage of stimulating careers for our young people, unique landscapes for our families, and growth opportunities for our businesses.



Philippe Couillard

Premier of Québec



MESSAGE FROM THE MINISTER FOR TRANSPORT AND THE IMPLEMENTATION OF THE *MARITIME STRATEGY*

The Maritime Strategy is an ambitious, visionary plan that will harness Québec's enormous maritime potential and promote its growth and long-term survival in the coming years. It will enable us to develop the St. Lawrence River, a resource with boundless development opportunities.

This 15-year societal project will rely on Québec's competitive advantages and, in particular, its strategic geographic position in relation to major international and domestic markets, in a context where international economic agreements are fostering trade.

The Maritime Strategy belongs to the inhabitants of our regions, which are benefiting from the necessary know-how and leadership to raise the profile of our industry far beyond our borders. It belongs to the businesspeople who will find in it, in particular with the establishment of logistical hubs and industrial port zones, numerous business opportunities. Lastly, it belongs to all Quebecers who wish to bring to fruition responsible maritime development, whose benefits will be felt throughout the province through economic growth and the creation of stimulating jobs in all regions.

Our action plan for the coming five years, elaborated with the sustained support of leaders in the maritime sector, will establish the foundation of Québec's maritime sector for the future. We are taking concrete action to support Québec shipyards, promote short

sea shipping, enhance the service offer of the Société des traversiers du Québec, develop the maritime tourism industry, ensure the long-term survival of the fishing and aquaculture industry, sustain innovation and research, and support the training and development of skilled workers. Québec will thus be called upon to fully benefit from its know-how and maritime assets.

Today, it is up to us to make this majestic waterway a leading economic, social and environmental player. Through the implementation of the first maritime strategy in Québec's history, together we will shape the Québec of tomorrow, focused on the responsible development of the St. Lawrence River, one of its most valuable resources.



Jean D'Amour

Minister for Transport and the Implementation
of the Maritime Strategy
Minister responsible for the Bas-Saint-Laurent region
and the Gaspésie-Îles-de-la-Madeleine region



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INTRODUCTION

The *Maritime Strategy*, the first such strategy in Québec's history, presents a perspective up to 2030 and sets out an action plan for the period 2015-2020.

The plan is at one and the same time ambitious and realistic. It seeks to foster sustainable growth in Québec's maritime economy and encourage the creation of quality jobs in all regions of Québec. It also seeks to protect the integrity of Québec's river and marine ecosystems while enhancing the betterment of communities in the maritime territory.

The *Maritime Strategy* hinges on a long-term perspective that reflects the findings of an extensive consultation¹ conducted among partners in Québec's maritime sector. It also relies on the expertise of several Québec government departments and bodies².

The Maritime Strategy will, by 2030, shape and satisfy Québec's maritime ambitions. It will contribute to ensuring the long-term survival of marine environments and their biodiversity. It will give rise to investment and job creation while confirming Québec's place as a transatlantic trade hub.

Moreover, it will encourage scientific research, the development of maritime expertise, community consultation, and the responsible development of the maritime territory, especially the St. Lawrence River³. Accordingly, like Québec, it will confirm the indissociable nature of the economic, social and environmental dimensions of sustainable development.

¹ APPENDIX 4: Partners that submitted a brief.

² APPENDIX 5: Government departments that participated in the elaboration of the *Maritime Strategy*.

³ "St. Lawrence" refers to the river and the Estuary and Gulf of St. Lawrence.



THE MARITIME TERRITORY, A MAINSPRING OF QUÉBEC'S COLLECTIVE WEALTH

The *Maritime Strategy* is relying on the outstanding potential of the St. Lawrence River and Québec's northern coasts. Québec's maritime territory continues to contribute to its economic, environmental and social wealth. This contribution, which is all too often overlooked or taken for granted, is nonetheless the source of a significant, promising maritime economy, an extensive, diversified maritime ecosystem, and the focal point of the well-being of riverside and coastal communities.

1.1. The St. Lawrence River, its tributaries and northern shores are outstanding assets for Québec

1.1.1. A resource closely linked to Québec's history

The histories of Québec society and the St. Lawrence River are closely linked. The discovery of Québec and its social and economic development are directly linked to the St. Lawrence River. Québec's main cities were founded along the river. Moreover, some of them were named according to the characteristics of the watercourses on which they were established, e.g. Québec⁴ and Trois-Rivières. The province's first business activities also stemmed from access to sea lanes, in particular for the purposes of exporting natural resources to Europe.

There is a close link between the maritime territory of the St. Lawrence River and human activities, with the result that more than 70% of Québec's population now lives in the St. Lawrence Valley, which provides both drinking water and leisure activities. A significant proportion of businesses are also located along the St. Lawrence River, in particular to benefit from strategic access to domestic and international markets.

Furthermore, Québec's northern coasts on James Bay, Hudson Bay, Hudson Strait and Ungava Bay are the focal point of the socioeconomic fabric of northern communities. Maritime access is essential to them to obtain supplies and for their economic development. This is true, in particular, of the Cree and Inuit communities in northern coastal villages.

1.1.2. A vast maritime territory and an outstanding environment

Québec's maritimes territory⁵ comprises not only its waters but also its shorelines. It is divided in two and first extends to northern Québec over more than 2 700 km. The northern portion comprises the tributaries of several indentations and bays along Québec's northern coasts in James Bay, Hudson Bay, Hudson Strait and Ungava Bay.

In the south, the maritime territory encompasses the St. Lawrence River, the St. Lawrence estuary, the Gulf of St. Lawrence and its shoreline. The St. Lawrence River is part of a vast area called *the Great Lakes and St. Lawrence River Basin*. Water from 7 of the 13 hydrographic divisions encompassing all of Québec's 430 major drainage

basins, i.e. more than one-third of Québec's territory overall, flow into the St. Lawrence River alone.

The St. Lawrence River is a unique, diversified ecosystem. The river comprises a series of riverine lakes, narrow sections and rapids leading to a riverine estuary in Trois-Rivières. Then, the river's freshwater stirred up by tides becomes increasingly salty downstream from Québec City and displays marine characteristics starting in Tadoussac. It then widens in the vicinity of Pointe-des-Monts to become a gulf, a vast inland encroachment of the sea. The abundant, varied ecosystems encompass unique fauna and flora, whose characteristics vary according to the tides and the degree of salinity (see Section 1.3.1).

To this maritime territory must be added the Saguenay Fjord, the Rivière Saint-Maurice and the Québec portions of the Rivière des Outaouais and the Rivière Richelieu and the Baie des Chaleurs, among others, along with their shorelines (**figure 1**). Appendix 6 provides a more detailed description of the geography of the maritime territory of the St. Lawrence River.

1.2. A contribution to Québec's economic wealth

1.2.1. A diversified maritime economy that creates jobs

Québec's maritime economy encompasses several economic sectors that rely on the use or exploitation of the potential of Québec's maritime territory, including conventional ones such as maritime transport, port operations, shipbuilding, tourism and fishing. Other emerging sectors include the development of marine biotechnology, aquaculture, the protection of ecosystems, the control and monitoring of maritime activities, support services, education and research in the maritime sector.

In addition to being essential to the Québec economy overall, the maritime economy is highly diversified and creates numerous jobs. As **table 1**, indicates, in 2013, the maritime economy supported 24 948 direct jobs, including 13 222 in the transportation sector, equivalent to 53% of the jobs, followed by seafood products (33%), shipbuilding (8%) and tourism related to international cruises (6%). The jobs, and the attendant economic spinoff are found to varying degrees in each region of Québec.

⁴ From an Amerindian word meaning « where the river narrows ».

⁵ The maritime territory is illustrated for information purposes. What is more, for the purposes of this document, "maritime" is taken broadly to encompass everything related to river, marine and shoreline resources.

Figure 1 Maritime territory**Territoire maritime (à titre indicatif)****Infrastructures de transport**

- Chemin de fer
- - - Desserte maritime
- - - Route gravellée
- Route pavée

Frontières

- - - Frontière internationale
- - - Frontière interprovinciale ou interétatique
- - - Frontière Québec – Terre-Neuve-et-Labrador (cette frontière n'est pas définitive)

Sources

Données	Organisme	Année
Divisions territoriales	MERN	2015
Infrastructures de transport	MERN	2015
Territoire maritime	MCE	2015

Réalisation

Ministère de l'Énergie et des Ressources naturelles
Ministère du Conseil exécutif
Note : La présente carte n'a aucune portée légale.
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Table 1: Number of direct jobs linked to Québec's maritime economy, by sector (2013)

SECTORS	NUMBER OF JOBS	%
Maritime transport (1)	13 222	53
Seafood products (2)	8 136	33
Shipbuilding (3)	1 990	8
Tourism related to international cruises (4)	1 600	6
Total	24 948	100

(1) Comité sectoriel de main-d'œuvre de l'industrie maritime. *Étude sectorielle sur les effectifs maritimes au Québec*, rapport préparé par Zins Beauduchesne et associés, 2013.

(2) Fisheries and Oceans Canada – région de Québec; ministère de l'Agriculture, des Pêcheries et de l'Alimentation du Québec. *Emplois directs dans les pêches et l'aquaculture commerciale*, données préliminaires, 2013.

(3) Compilation based on individual data from shipbuilding companies (2013).

(4) Ministère du Tourisme, data for 2012.

It should be noted that several tens of thousands of jobs in allied sectors are also linked to the maritime economy. Accordingly, maritime transportation activities are closely linked to land transportation since the vast majority of commodities loaded and unloaded in a port are then shipped by truck, train or pipeline to their shipping or reception point. The same goes for manufacturing enterprises that rely on maritime transport to obtain supplies or for distribution. The proximity of port facilities is a decisive factor when such firms decide where to locate.

1.2.2. A vast port system to support international trade

The St. Lawrence River offers Québec the possibility of positioning itself as the gateway to eastern North America. It affords Québec an undeniable competitive edge—a strategic geographical location—by positioning it on the key multimodal freight transportation routes. It is the entrance to a 3 770-km navigable waterway that extends to the heart of the North American continent at the western edge of Lake Superior. It is the shortest route between Europe and the North American heartland, two of the world's most heavily industrialized areas (**figure 2**).

Québec can rely on 20 commercial ports that make up a **strategic commercial port system** (**figure 3**). The federal government owns 11 of them (five Canadian port administrations and six Transport Canada ports), three are non-profit corporations, three are in the

private sector, two are operated by municipal organizations and one by the Québec government. What is more, 20 private wharves are located in public ports.

An initial designation of the strategic commercial port system was made in 2002 in conjunction with the deliberations of the Forum de concertation sur le transport maritime. It was updated in 2015.

Since the federal government established a new port regime in 1995, Transport Canada has received a mandate to transfer its port facilities to other levels of government, non-profit corporations or the private sector. Two commercial facilities, Havre-Saint-Pierre and Pointe-au-Pic, have thus been transferred to the community and six other ports (Baie-Comeau, Gaspé, Gros-Cacouna, Matane, Chandler and Rimouski) have the potential to be transferred, not to mention wharves that serve other purposes of which Transport Canada would also like to divest itself.

Québec's strategic commercial port system is a vital component of its transportation systems. It plays a key role in the Québec economy by supporting Québec firms in strategic sectors such as aluminum, metallurgy and pulp and paper, and in international trade. In 2011, Québec served by sea lane the main American, European, Asian and African markets. Some 58 million tonnes were loaded and 40.9 million tons were unloaded⁶. **Figure 4** illustrates the commodities loaded and unloaded in different markets.

Québec's commercial ports meet the market's requirements and have adapted their infrastructure accordingly. The Port of Montréal thus handles containers, the Port of Québec handles solid and liquid bulk shipments, and the Port of Sept-Îles handles mineral ore (see **box 1**). Furthermore, the ports will benefit specifically from the **Plan Nord**, bearing in mind the needs of mining companies for deep-water wharves and transshipment and ore processing center.

⁶ Statistique Canada. *Transport maritime au Canada 2011*. It should be noted that the data are compiled using a survey conducted on loading and unloading in Québec ports (Statistics Canada). Enquête sur le Transport maritime au Canada, Catalogue No. 54-205-X). The origin and destination of shipments does not necessarily indicate whether commodities are being imported or exported. Indeed, a considerable portion of freight is transhipped from big European ports such as Antwerp, Belgium or Rotterdam in the Netherlands.

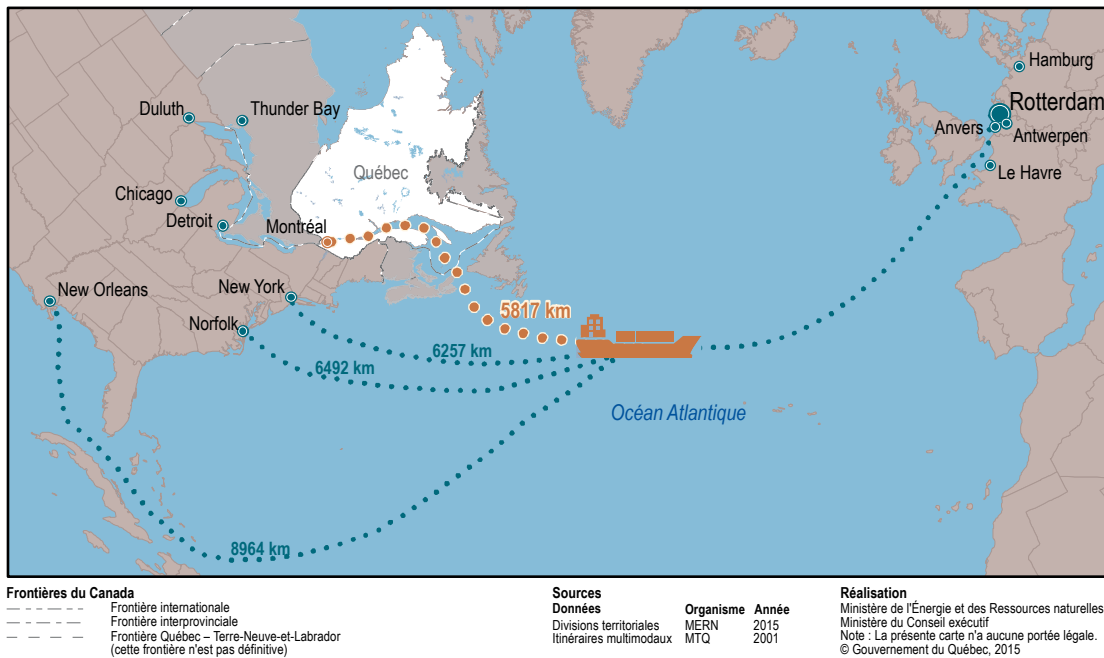
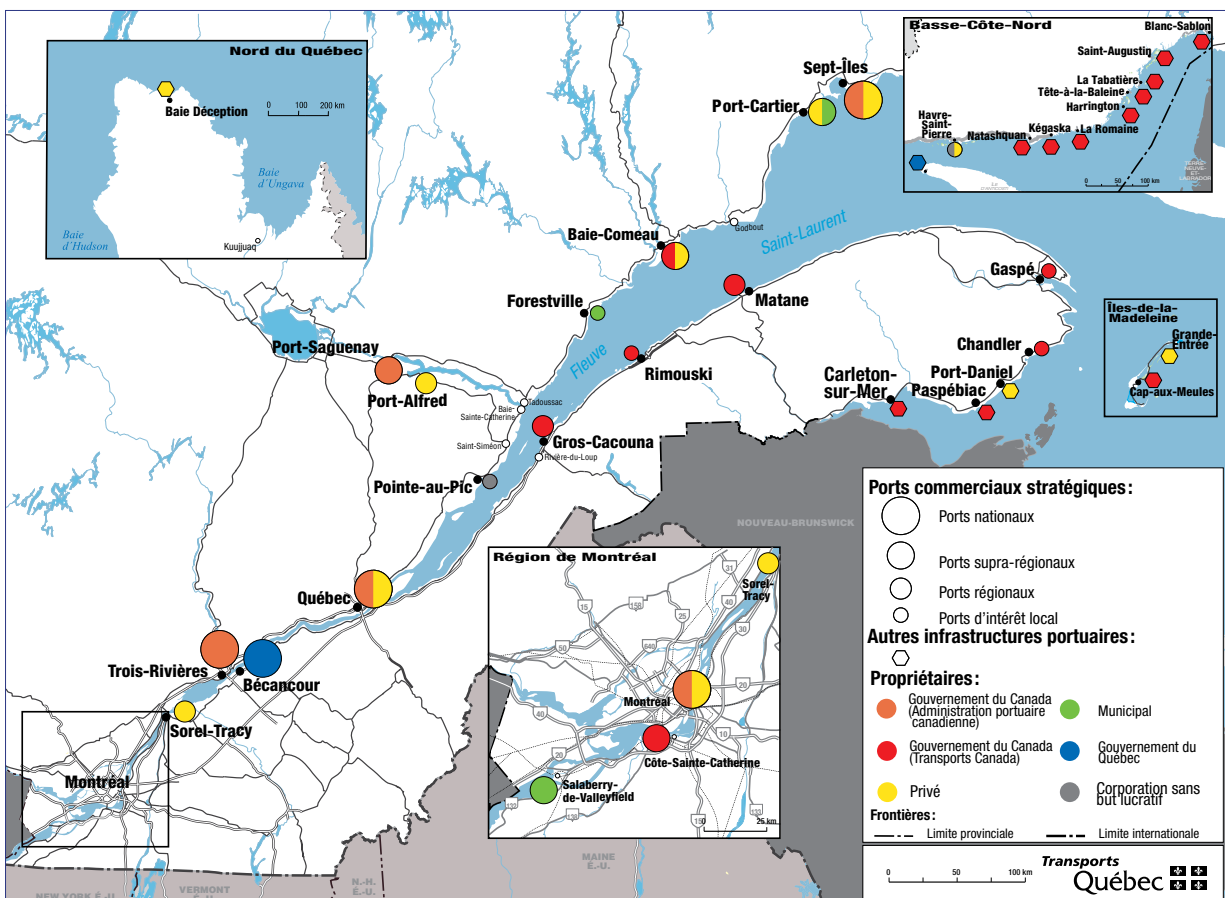
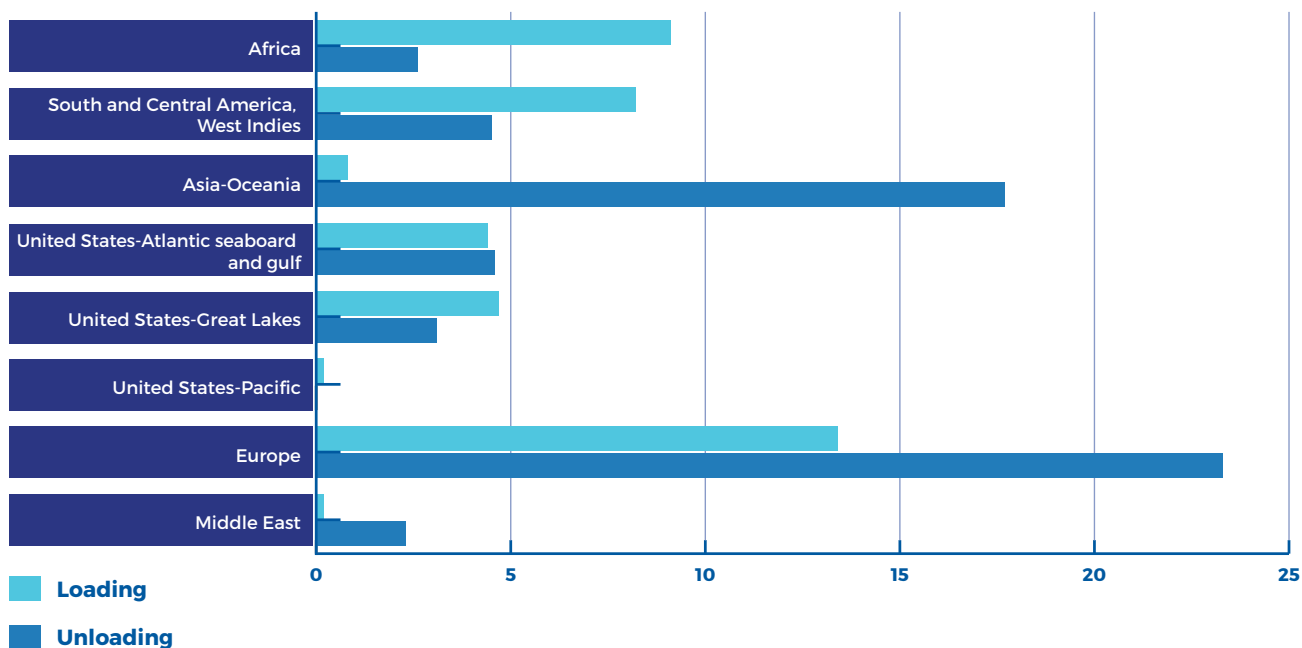
Figure 2 Major multimodal freight transportation routes**Figure 3** Québec's strategic commercial port system

Figure 4 International maritime transport in Québec

Tonnage of freight loaded and unloaded in 2011 (millions of tonnes)



Source: Statistics Canada, *Shipping in Canada (2011)*, Catalogue No. 54-205-X, 2012.

Box 1: QUÉBEC'S BIGGEST PORTS

- The **Port of Montréal** is an outstanding economic asset for Québec. It is the biggest container port on the east coast of Canada and offers significant growth potential, which affords it considerable pulling power among foreign investors and is an undeniable economic benefit for Québec. What is more, it is Canada's second biggest port after Vancouver and the fifth biggest port on the American east coast. It is interconnected to rail (through CN and CP) and road networks, which enables it to reach a market of more than 135 million people within a 1 000-km radius.
- The Port of Montréal's operations are part of a global container market that has experienced average annual growth of 10% in recent years. This type of sea transportation accounted for 16% of trade by volume in 2012 and more than 50% of trade by value since 2007. However, it should be noted that growth in the container transportation sector slowed in 2012 and fell from 13.1% in 2010 to 7.1% in 2011 and 3.2% in 2012⁷. Despite the downturn, the Port of Montréal is still competitively positioned and offers attractive potential for considerable private investments because of the volumes that transit through it. The Port of Montréal is planning an extensive expansion project in Contrecoeur, which will engender public and private investments on the order of \$750 million.

⁷ Review of Maritime Transport 2013, pages 6, 22 et 24.

Box 1: QUÉBEC'S BIGGEST PORTS*(continuation)*

- The **Port of Sept-Îles** is the biggest ore port in Canada. The year-round deep-water port recently built a multi-user dock that can accommodate the biggest bulk carriers (Chinamax⁸). Some 23 million tonnes of commodities—mainly iron ore—are handled there annually. Nearly 80% of the commodities loaded in the Port of Sept-Îles are destined for international market⁹.
- The **Port de Québec** is also noteworthy in that it is extremely competitive in the realm of solid and liquid bulk cargo transshipment. Major investments totalling \$500 million are planned to expand its facilities, including a 600-m quay line and a draft of up to 16 m at low tide, the construction of new facilities to handle bigger volumes of liquid bulk cargo, an 18-hectare expansion of the storage areas, and the redevelopment of the beach in the Baie de Beauport. The investments will generate roughly 3 000 permanent jobs according to the port administration.
- The Port of Québec is also noted for cruise ship tourism. It is a veritable driving force for all tourism sites in Québec. Economic spinoff from the port in this respect thus extends well beyond the Capitale-Nationale region alone and affects all of Québec, including Montréal. Projects are under way to redevelop the cruise terminal and the government intends to support the Administration of the Port of Québec in this respect.

1.2.3. Modal integration that stimulates the entire logistics chain

Moreover, for the past 25 years, the increase in Québec's international trade has led to rapid growth in the flow of goods, which has simultaneously promoted the development of **intermodal transport and the logistics industry**.

This emergence has given rise to massive investments in the upgrading of transportation equipment and infrastructure and the establishment of terminals to tranship goods from one mode of transportation to another. The phenomenon also explains certain major logistical infrastructure projects contemplated in Québec, such as the proposed establishment of

logistical hubs in Vaudreuil-Soulanges and Contrecoeur. In addition to the economic spinoff stemming directly from the investment projects, the Québec economy can capitalize on the Québec firms that will thus benefit from more efficient access to markets.

Maritime transport is also noteworthy in that it attracts investments from **other industrial sectors**, which ensures the complementarity of the maritime economy and the Québec economy overall (see **box 2**).

⁸ A heavy-load Chinamax ship carries more than 300 000 metric tonnes.

⁹ MERN.

Box 2: MARITIME TRANSPORT PROMOTES QUÉBEC'S INDUSTRIAL DEVELOPMENT

- The supplying of numerous mining projects and the shipment of mineral ore to processing centres or export markets relies almost entirely on maritime transport. The St. Lawrence River, the Saguenay and certain routes to the Nord-du-Québec region are essential for economic development under the Plan Nord.
- Québec's aluminum smelters rely extensively on maritime transport to handle and ship aluminum.
- Maritime transport is a vital activity for sectors upstream and downstream from the oil industry. It delivers the part of the raw materials needed for refining to refineries and subsequently transports a portion of petroleum products to markets.

Maritime transport's impact on industrial development is also apparent in the concentration of enterprises in geographic areas near ports. Companies establish themselves there to use maritime transport to achieve greater competitiveness on international markets. The zones include manufacturing, in addition to transport operations. By way of an example, paper manufacturers, wood processing firms, energy, metal and mineral companies in addition to machining and parts assembly are carried out there, not to mention food processors (including seafood products processors) and chemical and petrochemical products manufacturers.

1.2.4. Maritime transport is a vector for economic and industrial development

The Québec economy can rely on the expertise and availability of **maritime transport companies**. Depending on their clients' needs, carriers use all types and sizes of ships, such as barges, bulk grain carriers, chemical tankers, ore carriers, cruise ships, tankers, passenger liners, oil tankers, container ships, tugboats and bulk carriers.

Aside from the economic activity directly linked to maritime transport, support sectors are closely linked to it and are contributing to the province's prosperity. Québec can also rely on **seven shipbuilding yards** to satisfy the maritime industry's needs. Québec's shipbuilding industry has the advantage of being near many Canadian shipowners and being thoroughly familiar with their needs from the standpoint of ship fleet repairs and maintenance. Furthermore, it has valuable expertise concerning the specific demands that the northern climate makes on ships.

The shipbuilding yards, which employ on average between 1 200 and 2 000 workers per year depending on demand, build, repair or refit certain types of ships, including fishing boats, tour vessels, oil production platforms, tugboats and ferries. There is good reason to emphasize that the Davie Canada shipyard is the biggest ship builder in Canada in terms of capacity. What is more, two firms in Québec, Mount Royal Walsh and Scardana, specialize in afloat repairs.

In addition to the shipbuilding sector, an array of small and medium-sized enterprises (SMEs) revolve around the major shipyards, especially in the realm of ship design.

Box 3: QUÉBEC'S SHIPYARDS AND THEIR MAIN SERVICES¹⁰

CHANTIER DAVIE CANADA (Lévis)

- Construction and repair of different categories of heavy-load ships
- Manufacture of deep-sea infrastructure such as platforms, floating and subsea structures
- Specialized products and services

INDUSTRIES OCEAN (Isle-aux-Coudres)

- Specializes in small- and medium-tonnage steel- or aluminum-hulled vessels
- Structure, renovation, conversion, re-engining and inspection work
- Tugboat and marine salvage services

GROUPE MARITIME VERREAULT (Les Méchins)

- Repair and maintenance of cargo ships, tankers, oil tankers and cruise ships
- Ship conversion

CHANTIER NAVAL FORILLON (Gaspé)

- Construction of fishing boats, tugboats and ferries
- Maintenance and repair of boats of all sizes

MÉRIDIEN MARITIME (Matane)

- Construction, repair and inspection of tugboats, ferries, near-shore vessels and lighters

NAVAMAR (Montréal)

- Specializes in the repair of the entire array of ocean-going and continental ships of all sizes, from oil tankers to port tugboats

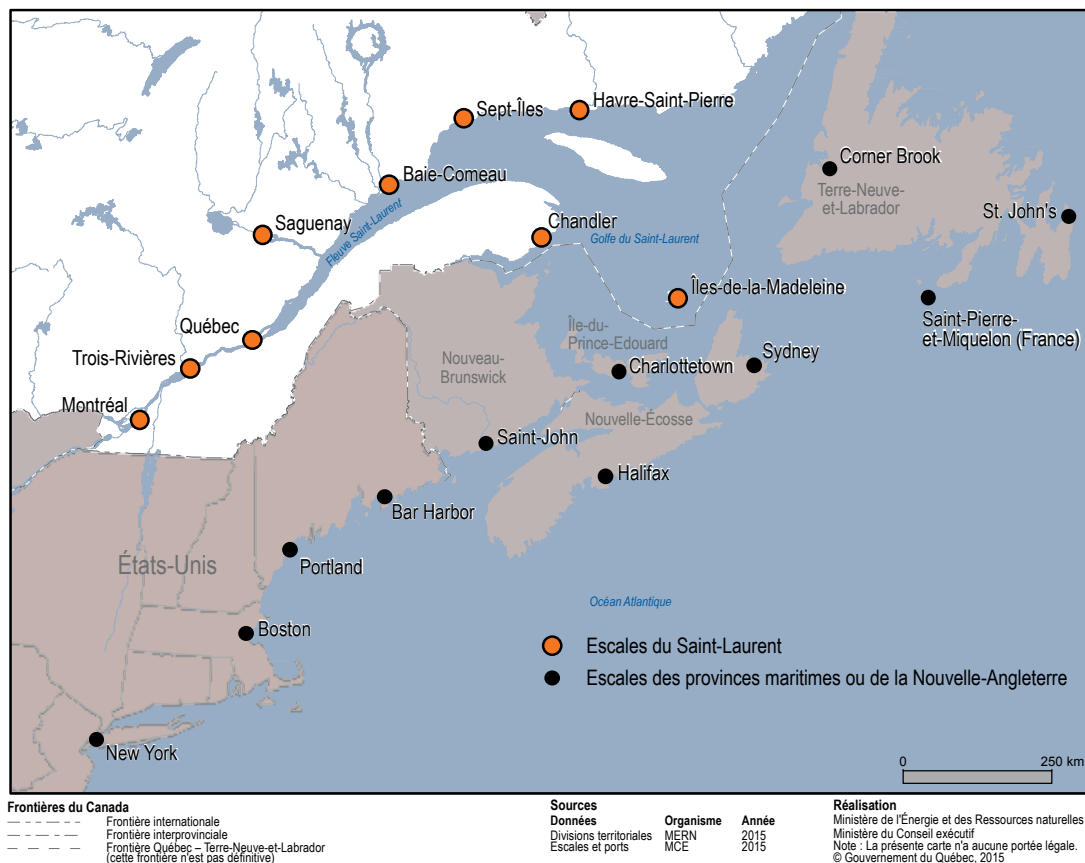
RECHERCHES ET TRAVAUX MARITIMES CONSTRUCTIONS (Québec)

- Construction of aluminum water jet propulsion excursion boats that are used around the world

1.2.5. Unique tourist attractions and a rapidly expanding industry

The St. Lawrence River is one of the world's most beautiful watercourses. Its enchanting setting changes

¹⁰ Information drawn from company websites (consulted on March 11, 2015).

Figure 5 Canada-New England international cruise route

District of Old Québec and the Parc national de Miguasha in the Baie des Chaleurs are UNESCO World Heritage Sites. This is also true of Lac Saint-Pierre, upstream from Trois-Rivières, which UNESCO has named a World Biosphere Reserve.

The natural and heritage sites along the St. Lawrence River represent products and attractions that have the advantage of being developed in the itineraries and programs of tour operators, which are competitive assets and satisfy demand from tourism markets outside Québec.

The major zones along the St. Lawrence River consequently offer an original, must-see destination to different tourist clienteles. This is true, for example, of **international cruises**, an emerging sector. To this end, the Association des croisières du Saint-Laurent is an essential ally for the government in structuring international cruises on the St. Lawrence River. The organization groups together nine stopovers¹¹, on the Canada-New England route recognized along the St. Lawrence River and serves as an important lever to

structure offerings and engage in marketing on behalf of its members and partners (**figure 5**).

Between 2006 and 2014, the number of cruise passengers who came ashore in Québec more than doubled from 112 000 to more than 260 000¹². In 2012, operations related to international cruises to Québec generated \$105 million in economic spinoff in addition to creating 1 600 jobs..

Marine mammal watching is also a highly popular tourist activity in Québec. Between 2005 and 2009, some 275 000 visitors, on average, visited each year the Saguenay–St. Lawrence Marine Park, the first marine protected area established in Québec, in 1998, to observe the mammals in their natural environment. In 2011, most of the visitors to the park came from France, Ontario and the United States.

Québec's maritime territory offers other promising tourism products. Combined with land excursions, **cruise-excursions** (without overnight stay) are growing appreciably.

¹¹ The nine international cruise stopovers on the St. Lawrence River are Montréal, Trois-Rivières, Québec City, Saguenay, Baie-Comeau, Sept-Îles, Havre-Saint-Pierre, Gaspé and the Îles-de-la-Madeleine.

¹² Special compilation of the Association des croisières du Saint-Laurent and Ministère du Tourisme.

This context is attributable, in particular, to the improved quality of the cruise-excursion experience on the St. Lawrence River and the increase in the number of clients interested in the product. Each year, Québec welcomes roughly 900 000 passengers on this type of cruise, over 30% of them to the Saguenay–St. Lawrence Marine Park..

River shuttles also significantly affect the accessibility and development of natural spaces (see **box 4**).

1.2.6. The fishing and aquaculture industry is forward-looking

The St. Lawrence River provides a habitat for a wide array of marine resources, which the fishing industry most extensively exploits. By developing the resources, the fishing industry is contributing to the economic vitality of several of Québec's regions, such as the Bas-Saint-Laurent, Côte-Nord, Gaspésie and Îles-de-la-Madeleine regions.

With the collapse of bottomfish stocks in the early 1990s, the industry has, however, had to significantly modify the fishery products¹³ that it offers and the nature of its investments in boats, fishing gear and the mechanization of processing plants. Today, the industry centres above all on fishing for crustaceans,

i.e. snow crab, lobster and shrimp, which, alone, account for roughly 85% of the value of landing¹⁴.

Moreover, deep-sea commercial fishing, the mariculture sector (sea farming), the fish-farming sector (freshwater aquaculture) and sportfishing support employment and create wealth in a number of Québec's regions (see **box 5**).

¹³ Fishing-related products.

¹⁴ MAPAQ. [www.mapaq.gouv.qc.ca/fr/Pêche/Pêche/Pages/Pêche.aspx].

Box 4: RIVER SHUTTLES: A STRUCTURING TOURIST COMPONENT

- River shuttles in Metropolitan Montréal are a structuring tourist component since they can link bicycle and pedestrian networks on the Route verte and the future Réseau vélo métropolitain.
- The metropolitan area has eight shuttle services on the St. Lawrence River and Lac Saint-Louis that provide access to recreational and tourist attractions such as the Old Port of Montréal, Parc Jean-Drapeau, the Parc national des Îles-de-Boucherville, and Île Saint-Bernard where the wharves and loading infrastructure are accessible through the bicycle networks on the Route verte.
- Moreover, several projects to round out the cruise-excursion service offer are in the planning and elaboration stage, e.g. links between the Plage de l'Est and Île Sainte-Thérèse, the Récré-O-Parc in Sainte-Catherine and Verdun, and Otterburn Park and McMasterville (Rivière Richelieu). Projects to link downtown Montréal and Pointe-aux-Trembles and Montréal Island and Montréal's South Shore are also under study.

Box 5: THE ECONOMIC IMPORTANCE OF QUÉBEC'S FISHING AND AQUACULTURE INDUSTRY

- In 2013, **deep-sea pêche commercial fishing** landings stood at 60 432 tonnes, an increase of nearly 7% in relation to 2012. During the same year, one thousand fishing businesses were active in Québec and provided employment for nearly 3 000 people. A dozen First Nations also engaged in commercial fishing. Overall landings of seafood products generated more than million¹⁵.
- In the same year, the volume of products sold in the **mariculture** sector reached 323 tonnes, representing overall sales of \$600 000. The figures in the **fish-farming sector** were 1 257 tonnes and \$10.9 million. Furthermore, the industry is proposing a worthwhile avenue for development bearing in mind the scope of the water bodies accessible in Québec for this purpose.
- The **marine products processing** sector encompasses 70 establishments located in the maritime regions, i.e. the Bas-Saint-Laurent, Côte-Nord, Gaspésie Îles-de-la-Madeleine regions, which generated some 4 631 jobs. The value of shipments of their products reached nearly \$380 million.
- What is more, several fish species are abundant and highly prized by sport fishermen. Québec has one million **sport fishermen**, and economic spinoff from freshwater fishing—including internal waters and the St. Lawrence River—represents \$1.06 billion a year. The spinoff generates \$117 million in tax revenues for Québec¹⁶.

1.2.7. Recognized knowledge and avant-garde institutions

The fishing and seafood product processing industry has been effectively supported in recent years by the emergence of new knowledge, especially concerning the seabed, marine biology, geology and the presence of metal ores. The support of emerging technologies opens up the prospect of new uses of the St. Lawrence River's marine resources.

What is more, Québec is a leader in the realm of research and innovation, in particular because of a vast network of institutions that have, over the years, acquired an international reputation. The institutions possess state-of-the-art infrastructure and rely on an imposing community of scientists in maritime sectors linked to domestic and international networks of researchers. In this respect, there are at least 17 research chairs dedicated specifically to maritime questions¹⁷ (see **box 6**).

© Éric Labonté, MAPAQ

¹⁵ MAPAQ, *L'industrie des pêches et de l'aquaculture commerciales: portrait, défis, enjeux et perspectives de développement*, August 2014.

¹⁶ *Ibid.*

¹⁷ Fonds de recherche du Québec, Université du Québec à Rimouski.

Box 6: EXAMPLES OF RESEARCH CHAIRS DEVOTED TO MARITIME QUESTIONS

The most active research chairs in the maritime sector include:

- the Institut des sciences de la mer de Rimouski (**ISMER**), a leader in the vast marine sciences field;
- the **Centre de recherche sur les biotechnologies marines (CRBM)**, which focuses on research and development (R&D), especially industrial research in biotechnology;
- **Merinov**, an innovation centre in the realm of aquaculture and fishing in Québec;
- the **Chaire de recherche sur les espèces aquatiques exploitées**, based at the Université du Québec à Chicoutimi, devoted to the elaboration of fishing management tools geared to the long-term survival of fishery resources;
- the **Institut Maurice-Lamontagne** which provides, among other things, a scientific basis for the conservation of marine fishery resources for the protection of the marine environment and safe maritime navigation¹⁸;
- the **Chaire de recherche en géoscience côtière** at the Université du Québec à Rimouski satisfies a significant need for knowledge on the dynamics of coastal evolution in the Estuary and the Gulf of St. Lawrence expressed by interveners and the government in order to ensure the sustainable development of the inshore environment¹⁹.

Several years of research have led to the establishment of a genuine maritime sector innovation chain²⁰, stemming from ideation and basic research toward the conception of specific technologies, experimentation, and the transfer and dissemination of technologies in businesses.

For each of the major functions, Québec educational and research institutions, government research centres and research and technology transfer centres are seeking to acquire new knowledge and elaborate specialized and industrial applications.

The system of innovation established over the years in the maritime sector has promoted the emergence of innovative enterprises focusing, in particular, on marine biotechnology. Some of the firms are developing the properties of algae while others are developing the residues of marine products containing ingredients to enhance the treatment of diseases such as hypertension and cardiovascular or coronary diseases.

1.3. Une contribution à la richesse environnementale du Québec

1.3.1. Unique, diversified ecosystems

Québec has a wide array of diversified maritime ecosystems. The St. Lawrence River encompasses unique fauna and flora whose characteristics vary according to the tides and the degree of salinity. More than 1 900 plant species, nearly **77% of Québec vascular flora**²¹ now grow along the shores of the St. Lawrence River or less than 10 km from the shorelines²². Part of the flora is associated with the wetlands that cover large areas along the edge of the shores and islands of the St. Lawrence River.

The St. Lawrence River, its shores and islands also provide a habitat for diversified wildlife comprising nearly 400 bird species, more than 200 freshwater and saltwater fish²³, 16 amphibian species, 14 reptile species²⁴ and

¹⁸ Fisheries and Oceans Canada [www.qc.dfo-mpo.gc.ca/iml-mli/institut-institute/index-fra.asp].

¹⁹ Chaire de recherche en géoscience côtière – Le laboratoire de dynamique et de gestion intégrée des zones côtières – SICEC. [dgizc.uqar.ca/Chaire_de_recherche.aspx].

²⁰ Appendix 2: Glossary

²¹ "Vascular" plants include all ferns and seed plants and flowering plants.

²² J. Deshayes, J. Desgranges et B. Jobin. *La protection des plantes vasculaires à statut précaire du Saint-Laurent*. [En ligne]. [http://www.provancher.qc.ca/upload/file/130_2%20p%2016-27.pdf].

²³ DesGranges, J.-L. et J.-P. Ducruc (sous la direction de). *Portrait de la biodiversité du Saint-Laurent*. Service canadien de la faune; Environnement Canada, région du Québec; Direction du patrimoine écologique du ministère de l'Environnement du Québec, 2000.

²⁴ Centre Saint-Laurent. *Rapport-synthèse sur l'état du Saint-Laurent – volume 1: l'écosystème du Saint-Laurent*, Environnement Canada, région du Québec – Conservation de l'environnement, éditions MultiMondes, Montréal, collection *Bilan Saint-Laurent*, 1996.

roughly 70 terrestrial or amphibian mammal species²⁵, including the planet's biggest mammal, the blue whale, and the beluga (or white whale).

Whether wildlife species live year-round or seasonally during certain crucial stages in their development, the St. Lawrence River and its shores provide often unique conditions for such species. Nearly 850 protected areas that serve different purposes (**figure 6**) and display varied characteristics have been designated on the shores, islands and waters of the St. Lawrence River, totalling an area of more than 8 500 km²: National Wildlife Areas, migratory bird sanctuaries, national parks and all manner of protected sites, including the famous Saguenay-St. Lawrence Marine Park, reflect the St. Lawrence River's remarkable natural heritage.

1.3.2. A contributing factor in the attainment of greenhouse gas (GHG) reduction targets

Maritime transport, in particular short sea shipping to replace other modes of freight transportation, is contributing to the reduction of airborne emissions. This mode of transportation emits less air pollution than alternative modes of transport such as road and air transport. Chapter 2 examines in greater detail the role of short sea shipping in attaining Québec's environmental targets and from the standpoint of economic development.

1.4. A contribution to Québec's social wealth

1.4.1. A source of betterment for numerous Québec communities

Given that waterways sustain Québec's development, there is a close link between the maritime territory and human activities. More than 70% of Québec's population lives in the St. Lawrence Valley. A significant proportion of Quebecers obtain some or all of their drinking water from St. Lawrence Valley freshwater. There are 57 water inlets²⁶ on the St. Lawrence River, which supplies drinking water for nearly **40% of Québec's population**.

Among other things, the St. Lawrence River allows Quebecers to engage in sportfishing, boating, nature study, deep-sea diving or swimming. In the same way, several of Québec's Aboriginal communities engage in activities closely linked to the maritime territory.

1.4.2. Better connected communities

Québec's vast maritime territory and its transportation infrastructure make it possible to reach certain remote communities that depend on maritime access to obtain supplies and for economic development. This is true, in particular, of mainly Cree and Inuit communities in coastal villages that **northern maritime infrastructure** serves. The northern maritime territory can be divided into two parts, i.e. Nunavik, north of the 55th parallel, and James Bay (**figure 7**).

Nunavik's port infrastructure serves the 14 Inuit communities in the territory and the Cree community of Whapmagoostui.

The marine infrastructure plays a crucial role in the region's economic development since supplies are obtained solely by sea and by air. Such infrastructure contributes, for example, by means of breakwaters, to the safety of local fishermen, hunters in transit and navigators, who supply goods such as food, construction materials, vehicles, petroleum products, and so on, mainly from Greater Montréal. Nunavik also has a private deep-water port in Deception Bay.

The *Partnership Agreement on Economic and Community Development in it possible to finance the construction of Nunavik*²⁷ signed in 2002 between the Inuit and the Québec government, made it possible to finance the construction of Nunavik marine infrastructure at a cost of \$91.5 million to promote economic and community development in the communities served. On the other hand, the long-term survival of the infrastructure, which is of strategic importance to Nunavik, is still not assured, especially as regards maintenance. Consequently, the Québec government intends to work in cooperation with the federal government and the local communities concerned to resolve problems related to the maintenance and rebuilding, if need be, of northern marine infrastructure.

Furthermore, the four Cree communities located on the western coast of James Bay—Chisasibi, Eastmain, Waskaganish and Wemindji—also have marine infrastructure, which is less developed and mainly comprises boat launching ramps. While some shipping can be effected by barge, most supplies to the communities that have been opened up arrive by road.

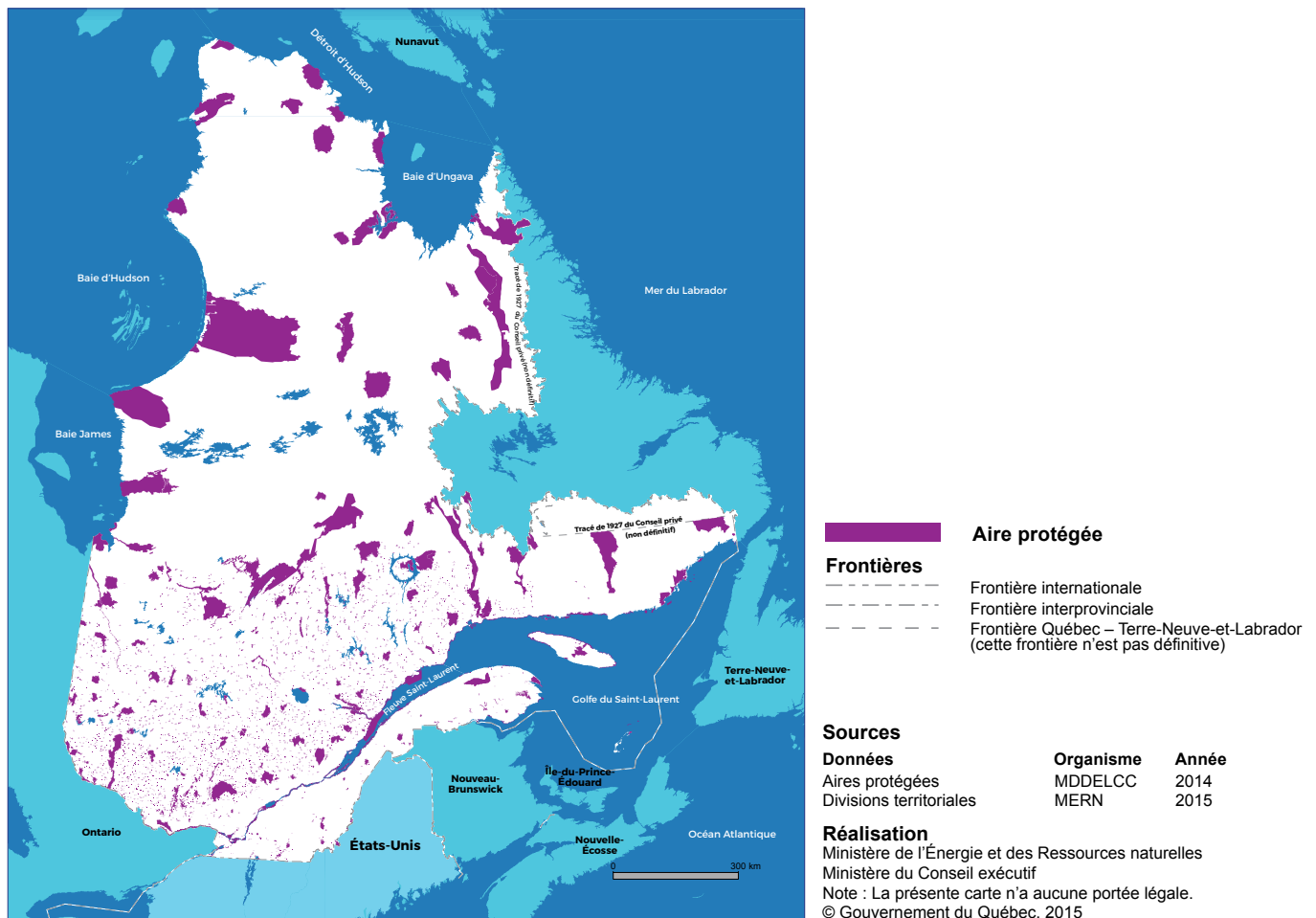
Ferries serve other isolated territories such as the Îles-de-la-Madeleine and the MRC du Golfe-du-Saint-Laurent, located east of the Rivière Natashquan and the border with Newfoundland and Labrador. Québec has public and private ferry services that ensure the

²⁵ Ministère des Ressources naturelles et de la Faune, Faune Québec. *Liste de la faune vertébrée du Québec*, mise à jour de septembre 2009, [En ligne]. [<http://www3.mffp.gouv.qc.ca/faune/verteebree/>].

²⁶ MDDELCC. [www.mdclcc.gouv.qc.ca/eau/potable/distribution/index.asp] (data updated as of August 21, 2012).

²⁷ The agreement is accessible at : [http://www.autochtones.gouv.qc.ca/rerelations_autochtones/ententes/inuits/20020409.pdf].

Figure 6 Protected areas



mobility of passengers and goods in its territory. In particular, the services ensure smooth travel between the north and south shores of the St. Lawrence River. Elsewhere, and in particular downstream from Québec City and Lévis, passenger trips and goods shipments rely essentially on the ferries and services under the responsibility of the Société des traversiers du Québec (STQ). Such services are especially important for populations that are not connected to the basic road network (see **box 7**).

1.4.3. A source of heritage and cultural wealth

Culture, heritage and sea lanes are indissociable. Consider, for example, the Old Québec heritage site, which has been designated a UNESCO World Heritage Site and is closely linked to the St. Lawrence River, or the wreck of the *Empress of Ireland*²⁸ which, in addition to

delighting divers, is a reminder of the historic, enduring importance of the St. Lawrence River, which is our gateway to the world.

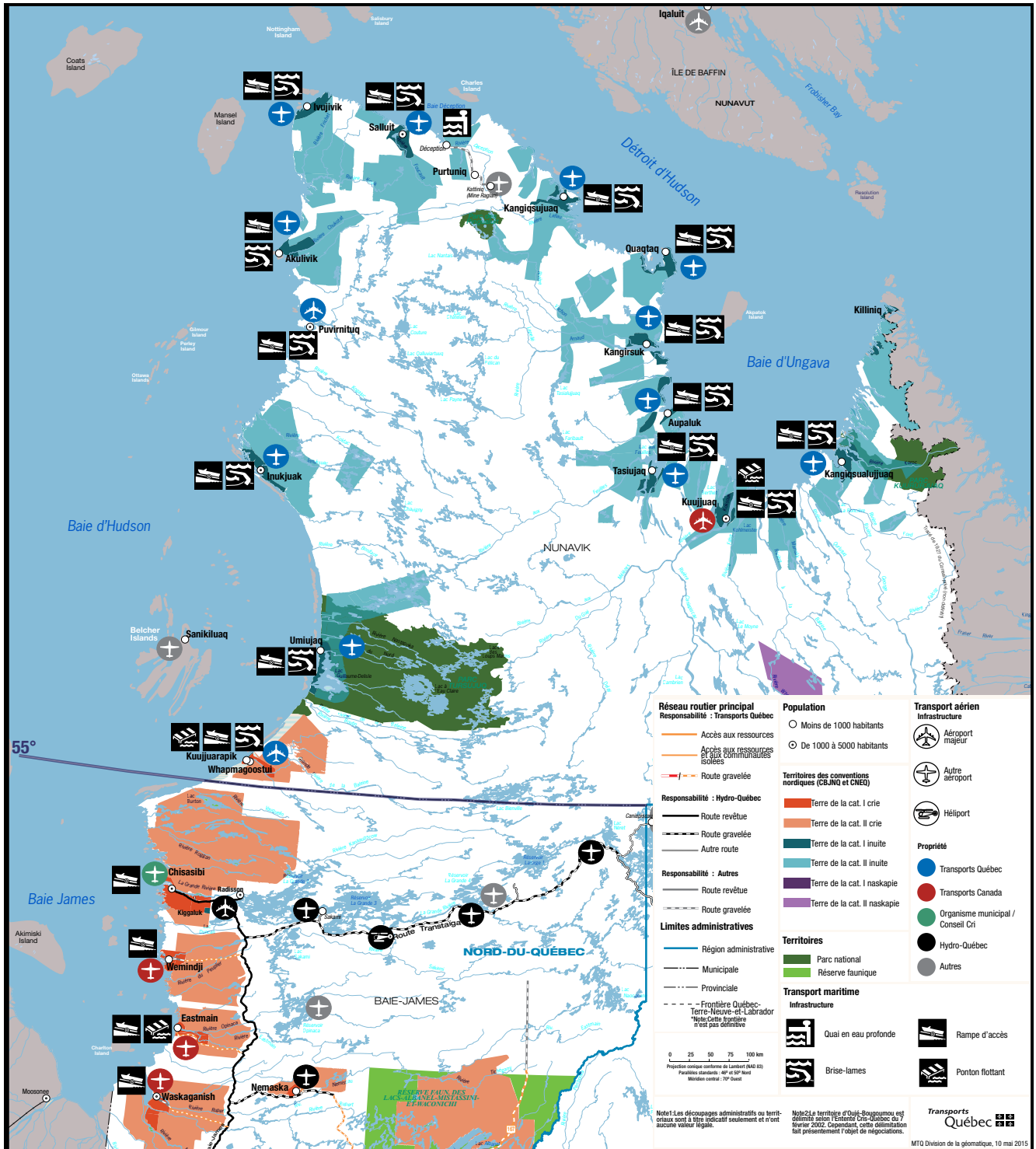
In the context of the *Maritime Strategy*, culture represents for the government a key player in the development of the advantages that Québec intends to develop and consolidate its maritime economy. It is also an undeniable lever to enhance the quality of life throughout the territory.

Since 2011, the **Cultural Heritage Act** (chapter P-9.002) has empowered the Québec government to grant legal status to facets of the *cultural heritage* in all fields, including the maritime sector, to ensure their preservation and development³⁰.

²⁸ The *Empress of Ireland*, a transatlantic steamship built in 1906, is a historical monument that was classified in 1999 as a heritage site. The wreck has sat off Sainte-Luce since the ship sunk in 1914.

²⁹ Société des traversiers du Québec. *Rapport annuel de gestion 2013-2014*, Québec, 2014, 82 p.

³⁰ It should be noted that 8 of the 12 heritage sites that the Québec government has designated are located along the St. Lawrence River or in the Gulf of St. Lawrence: the Archipel-de-Mingan in Havre-Saint-Pierre and Longue-Pointe-de-Mingan in the Côte-Nord region; Percé in the Gaspésie-Îles-de-la-Madeleine region; the Île-d'Orléans, Old Québec and Sillery in the Capitale-Nationale region; Trois-Rivières in the Mauricie region; La Prairie in the Montérégie region; and Montréal.

Figure 7 Northern marine infrastructure

Box 7: THE STQ'S ROLE IN LINING COMMUNITIES

- The government-subsidized ferry network under the responsibility of the Société des traversiers du Québec (STQ) comprises 13 crossings and maritime services, eight of which it fully operates and five in partnership with the private sector.
- Some of the crossing and maritime services extend the road network, e.g. Tadoussac–Baie-Sainte-Catherine. Others make accessible isolated territories such as the Îles-de-la-Madeleine and the MRC du Golfe-du-Saint-Laurent. Lastly, other crossings such as Québec City–Lévis, Matane–Baie-Comeau–Godbout and Sorel-Tracy–Saint-Ignace-de-Loyola, serve both shores of the St. Lawrence River. What is more, Québec benefits from federal ferry crossings that link Québec to Prince Edward Island and Newfoundland and Labrador. The Québec and federal governments are collaborating to optimize the ferry service to the Îles-de-la-Madeleine.
- During its 2013-2014 fiscal year, the STQ transported 5.1 million passengers and 2.1 million vehicles on a total of 112 000 crossings²⁹. Ferry services thus act as a driving force for economic, social and tourist development and contribute actively to the prosperity of the populations that benefit from them.

The *Cultural Heritage Act* also confers powers on municipalities and Aboriginal communities wishing to grant legal status to facets of their cultural heritage that they value. Above all, the Act reflects the broadening of the notion of heritage likely to be beneficial to the maritime economy in that it includes not only the movable and immovable tangible heritage but also heritage cultural landscapes and intangible heritage. This means that a cultural landscape in the maritime territory may be subject at a community's request to a designation that confers on it a status that contributes to its development and preservation in addition to emphasizing its outstanding traits both in the host community and among tourists.

The designation of a heritage cultural landscape in a maritime territory has several positive impacts. By attributing the status³¹, the government is according a quality seal that:

- formally recognizes that a maritime territory has out-standing landscapes that deserve to be preserved;
- promotes its development;
- enables the municipalities to reuse it in local development initiatives, especially as regards tourism.

Accordingly, the government may, in cooperation with the communities, grant legal status to facets of the intangible heritage that can be transmitted from one person to another such as know-how, knowledge, expressions, and traditional practices related to fishing and shipbuilding. This is true of ice canoeing on the St. Lawrence River, which was officially designated in 2014 as a facet of the intangible heritage³².

What is more, Québec's museums possess valuable artworks and ethnographic items whose themes, use or provenance confirm Québec's maritime identity and its historic foundations. The Ministère de la Culture et des Communications (MCC) also maintains valuable partnerships with the Aboriginal communities and nations living in the maritime territory and in which there is a varied archaeological heritage.

³¹ *Répertoire du patrimoine culturel du Québec* [www.patrimoine-culturel.gouv.qc.ca].

³² Ice canoeing on the St. Lawrence River is a winter team sport that is part of social practices and festive events. Current practice is mainly competitive during races where athletes travel over water, ice or on frazil ice.



CHALLENGES AND OPPORTUNITIES

Québec can rely on outstanding maritime assets found in few regions of the world, which can further contribute to the collective wealth of Québec society in economic, environmental and social terms. Numerous development opportunities must be grasped in a sustainable development perspective. Our maritime ecosystems are fragile and it is essential to protect them to ensure long-term, acceptable development.

2.1. Economic challenges and opportunities

2.1.1. Market globalization

Market globalization and robust growth in international trade are offering Québec an opportunity to position itself as the **international gateway to eastern North America** for transit cargo. Indeed, Québec is centrally located in several major North American trade corridors.

Several factors underpin Québec's favourable prospects in the realm of maritime transport by the year 2030:

- the *Canada and European Union (EU) Comprehensive Economic and Trade Agreement (CETA)*. The agreement covers a market of 510 million people. It will offer new business opportunities that will enable Québec to import and export a host of goods such as agro-outputs, forest and marine products and raw materials;

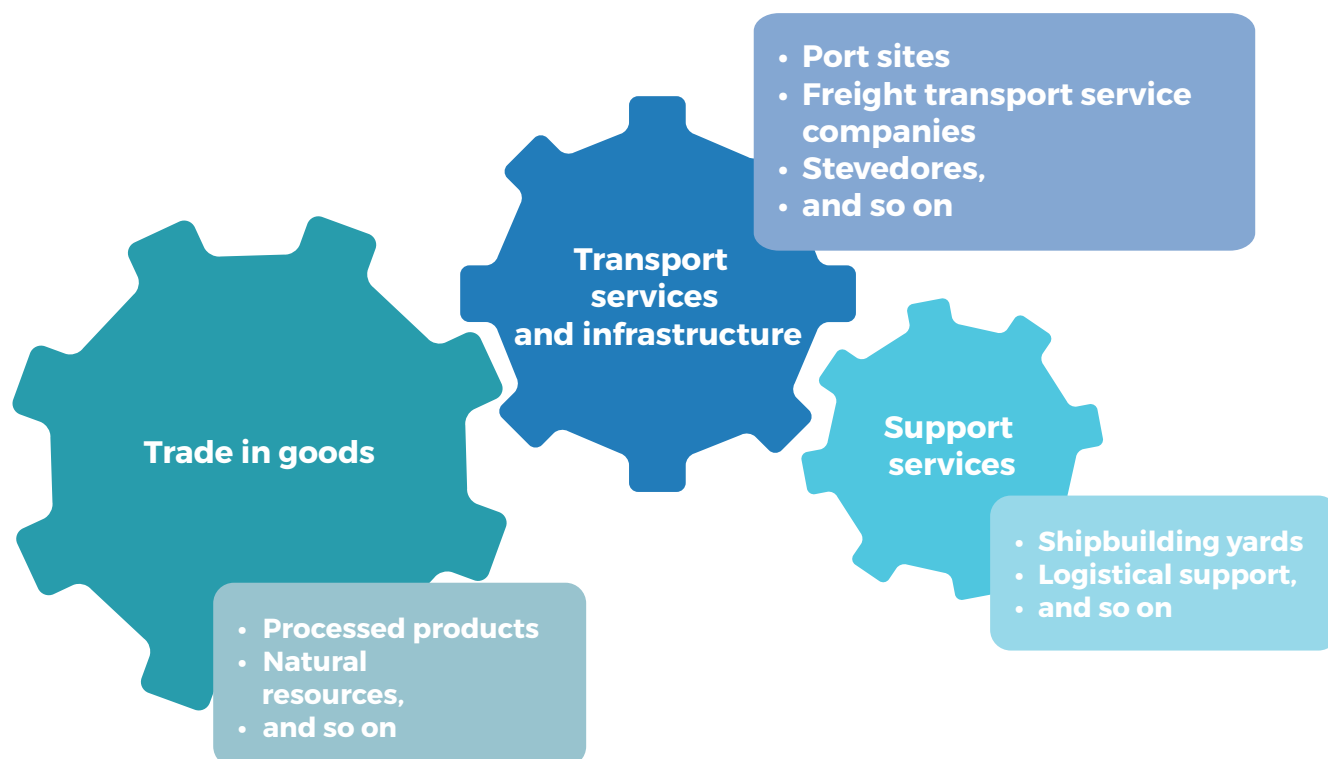
- economic growth in the emerging countries, especially the BRIICS, i.e. Brazil, Russia, India, Indonesia, China and South Africa. These vast, expanding markets have considerable needs, in particular for a number of products and natural resources that Québec can offer them;

- access to a northwest passage in the Arctic Ocean and the expansion of the Panama Canal locks. These factors are likely to increase global goods traffic, a situation from which Québec can benefit;

- more congested goods transport in ports on the American west coast. The Port of Montréal has benefited from such congestion in recent years. To avoid it, certain Asian countries are using the Suez Canal to transport freight destined to North America;

- in the shorter term, encouraging signs of a rebound in the American and Canadian economies, which are highly integrated because of the North American Free Trade Agreement (a potential market for Québec of 475 million consumers)³³.

Figure 8 ▶ The economic gearing of seaborne freight transport



Source: Secrétariat aux affaires maritimes

³³ World Bank. Compilation de données [donnees.banquemondiale.org].

As **figure 8** shows, the growth in merchandise trade is stimulating demand for transport services and port infrastructure, which, in turn, is affecting support services related to shipbuilding yards, transport logistics, and so on. The economic gearing of seaborne freight transport also generates numerous business opportunities in a number of economic sectors.

To take advantage of increased commodity flows, it is essential that they do not merely transit through Québec but that they benefit from added value generated by Québec workers and know-how. In this respect, the establishment of logistical hubs might be a means of achieving such added value. Accordingly, by banking on Québec's strategic geographical location (see Section 1.2.2.), it would be possible to attract investments, increase the level of processing of raw materials and therefore to create jobs.

2.1.2. The proximity of top-notch transportation infrastructure

The proximity of a commercial port offers a genuine comparative advantage on which many firms rely, especially in the manufacturing sector. In Québec, manufacturing firms located near ports employ more than 29 000 workers and are contributing significantly to the vitality of Québec's regions. The current economic setting, characterized by the drop in the exchange rate and economic growth in the United States, is especially favourable to the revival of the manufacturing sector.

The competitiveness of Québec businesses should be bolstered, in particular by putting to good use the competitive advantage that the proximity of port services offers. Such businesses, especially those in the manufacturing sector, could thus improve their competitive position, increase output and create more jobs.

2.1.3. The intensification of competition in the port sector

Moreover, such economic development potential has not been achieved. Competition is keen in the marine shipping industry, both from the northeastern United States, where port administrations plan to invest massively in infrastructure, and from the western US and Canada, with the rapid development of trade with Asia (see **box 8** and **figure 9**). Despite their complementarity with maritime transport, rail and road transport compete with ocean carriers both in Québec and on certain continental routes, above all for the shipment of products such as aluminum and paper.

To derive the maximum potential benefits from the development of the St. Lawrence River, we must reaffirm Québec's international and continental positioning in the realm of maritime transport. The challenge is all the more important because the Québec economy is open and relies extensively on external trade. Its competitiveness is closely linked to the efficiency of transportation services, especially maritime transport.

Oceans carriers are facing the challenge of improving their efficiency to offer more competitive costs by relying on incremental benefits such as offering more ecological transport than road and rail transportation.

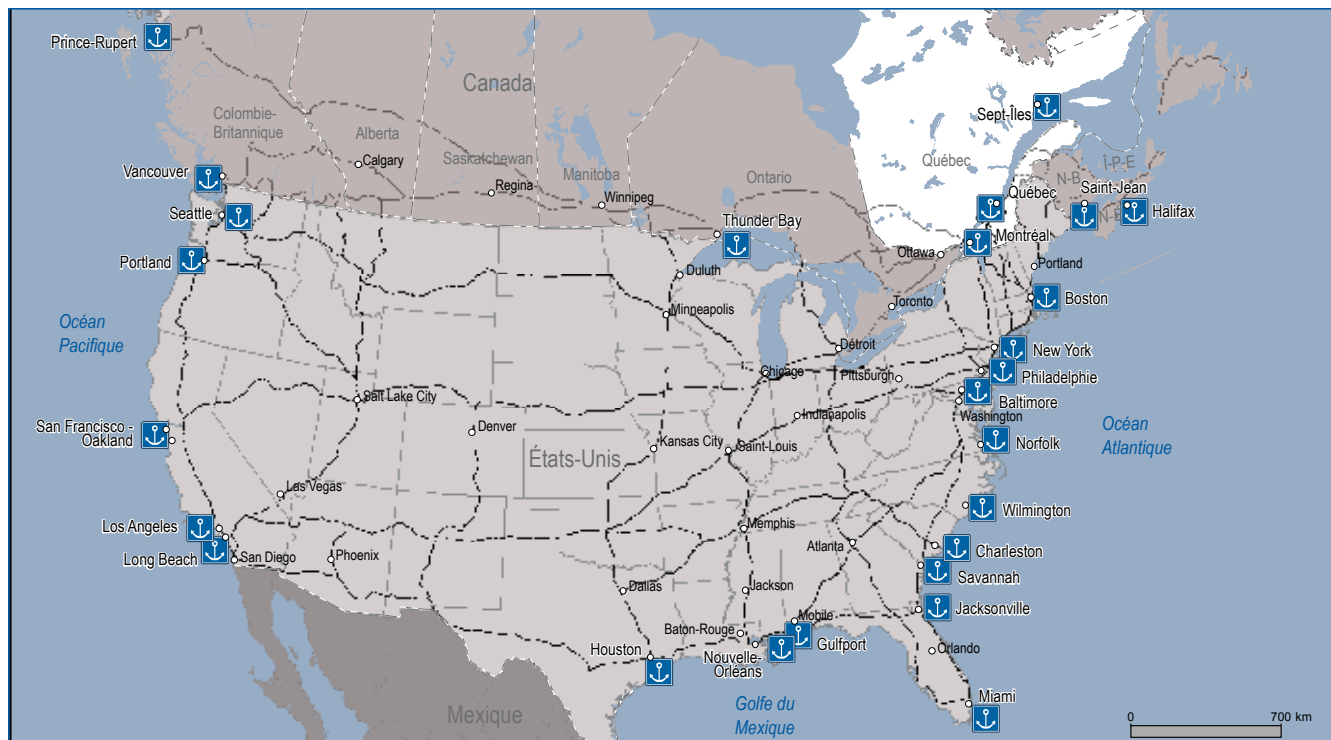
Box 8: **STIFFER COMPETITION IN MARITIME TRADE**

Several examples illustrate the intensification of competition in maritime trade:

- In the United States, the American Association of Port Authorities (AAPA) anticipates that American port administrations and their private partners will invest more than US\$8 billion between 2012 and 2016 in port infrastructure on the Atlantic seaboard and the Great Lakes³⁴. Some of the ports are competing directly with the Port of Montréal as the main gateway for shipping traffic arriving from the Atlantic Ocean. Furthermore, certain ports on the American east coast have the capacity to compete with the Port of Montréal for container traffic.
- The trend for markets to migrate westward linked to economic cooperation agreements with Asian and Pacific countries is promoting the development of ports on the Pacific coast, both in the United States and in Canada.
- In particular, the Port of Vancouver handles extensive, constantly growing bulk goods and container transport.

³⁴ AAPA [www.aapa-ports.org/Press/PRdetail.cfm?itemnumber=18583].

Figure 9 Main North American ports



Frontières
 - - - - - Frontière internationale
 - - - - - Frontière interprovinciale
 - - - - - Frontière Québec – Terre-Neuve-et-Labrador
 (cette frontière n'est pas définitive)

Sources
Données
 Divisions territoriales
 Infrastructures de transport

Organisme
 MERN
 MTQ

Année
 2015
 2001

Réalisation
 Ministère de l'Énergie et des Ressources naturelles
 Ministère du Conseil exécutif
 Note : La présente carte n'a aucune portée légale.
 © Gouvernement du Québec, 2015

2.1.4. The development of short maritime sea shipping

Short sea shipping now accounts for roughly 20% of shipping traffic in St. Lawrence River ports. It relies on at least a dozen shipowners engaging in short sea shipping, with unloading points in Québec ports. The development potential of short sea shipping is considerable bearing in mind its role in combating climate change and potential demand in certain specialized niches (see **box 9**)

Indeed, recourse to short sea shipping is associated with the development of a green economy since it reduces air pollution emissions in relation to other modes of transportation. Several governments have made it a key issue in the fight against air pollution, in particular through the elimination of greenhouse gases and the attainment of the targets under the de *Kyoto Protocol*³⁵. Short sea shipping is helping to reduce growth in heavy vehicle traffic on the road network and to ensure better modal distribution. It is usually part of policies to support sustainable development.

2.1.5. Advances in marine biotechnologies and aquaculture

The development and growth potential of the fishing and aquaculture industry in Québec is inestimable. It hinges, in particular, on recent advances in marine biotechnologies and aquaculture.

Marine biotechnologies, a rapidly changing scientific sector, offer significant avenues for diversification that focus on seafood products and waste from processing. Fishing and aquaculture products traditionally used as food can benefit from new outlets through the judicious pairing of technological innovation and scientific skills. This is true, for example, of projects to extract molecules and ingredients from such products in the pharmaceutical, cosmetics and medicine sectors. The use of enzymes from the shells of crustaceans such as crab, lobster and shrimp or the extraction of oils from fish skins also offer new, lucrative business opportunities.

³⁵ UN. [unfccc.int/portal_francophone/essential_background/kyoto_protocol/items/3274.php].

What is more, Québec's numerous water bodies can support growth in aquaculture. In this way, through the recent advent of water recirculation technologies, fish-farming (trout, brook trout, Arctic char) can now hope to significantly increase output to satisfy growing consumer demand. By eliminating waste from fish production, the new techniques will enable the sector to advance further toward environmentally sound development.

2.1.6. The global context in the shipbuilding sector

Expanding international trade is spurring robust growth in the global shipbuilding market. On the other hand, demand for new ships is creating oversupply from emerging countries such as China, Vietnam, Singapore, Malaysia, India, Qatar and Brazil. The financial support that the governments of these countries provide to the industries is creating imbalance and downward pressure on prices, which is not making things easier for Québec shipyards.

What is more, in June 2010, the Government of Canada unveiled its *National Shipbuilding Procurement Strategy*³⁶, under which it plans to replace several ships. Québec's shipbuilding industry is in a good position to satisfy such needs.

It has the capacity to replace the obsolete ships with much more efficient, environmentally-friendly vessels.

2.1.7. Skilled labour needs

By 2030, the development of the maritime industry will broaden skilled labour needs both in terms of the number of workers and their skills, in a context where the average age of workers in certain maritime occupations is high. Consultations with the industry have revealed manpower shortages, especially in the fishing industry and maritime transport sector.

The sectorial manpower committees have already noted certain needs:

- the Human Resources Sectorial Committee of the Maritime Industry (CSMOIM) estimates that the number of jobs to be filled between 2013 and 2016 in the cruise-excursions, ferry, shipowner and port and maritime services sectors stands at 2 000³⁷.
- the Comité sectoriel de main-d'œuvre des pêches maritimes (CSMOPM) estimates at 1 759 jobs the manpower needs of the marine products processing, aquaculture and capture sectors between 2014 and 2016³⁸.

Box 9: THE FUTURE OF SHORT SEA SHIPPING HINGES ON THE DEVELOPMENT OF SPECIALIZED NICHES

Below are some examples of niches that could foster the development of short sea shipping:

- Liquefied natural gas (LNG): anticipated growth in demand for LNG will displace that for other types of energy products. What is more, LNG imports by means of maritime transport have been rising for several years. Natural gas is a worthwhile tool for regional development and is becoming an alternative source of supply for the mining industry and certain communities in the Nord-du-Québec region.
- The transportation of raw materials and equipment stemming from the revival of the **Plan Nord**: the **Plan Nord** offers extensive development opportunities, especially for the shipment to southern Québec of considerable quantities of raw materials and, northward, of machinery, equipment or materials destined for worksites or remote areas, or alternative energy sources, including LNG.
- Other development niches, more specifically:
 - niches related to the transportation of wood and the transportation by barge of metals and certain specialized construction materials offer worthwhile potential;
 - the transportation of commodities and petroleum products to communities in the MRC du Golfe-du-Saint-Laurent that are inaccessible by road.

³⁶ Public Works and Government Services Canada. [www.tpsgc-pwgsc.gc.ca/app-acq/sam-mps/snacn-nsps-fra.html].

³⁷ CSMOIM. *Étude sectorielle sur les effectifs maritimes au Québec*, November 7, 2013, p. 111.

³⁸ CSMOPM. *Diagnostic de la main-d'œuvre dans l'industrie des pêches et de l'aquaculture commerciales au Québec*, March 2014, p. 35.

Moreover, manpower needs in industries related to the maritime industries are expected to grow, e.g. in primary processing plants, transportation or ground transportation logistics. Pressure is also anticipated on professions in the marine sciences and technologies, fields that demand very specific qualifications. It should also be noted that the training offered in all maritime sectors will face the challenge of adapting to respond to new market demands concerning technology, health, safety and environmental protection.

Having said that, the maritime sector can take advantage of numerous institutions that offer training and skills development support services adapted to workforce needs and employers. This obviously includes educational institutions, government departments and several specialized organizations, including sectoral manpower committees, which have a mandate to define the specific labour development needs in their economic activity sector

Aside from the CSMOIM and the CSMOPM mentioned earlier, the Maritime Strategy concerns two other sectoral manpower committee:

- the Comité sectoriel de main-d'œuvre en tourisme (the Conseil québécois des ressources humaines en tourisme);
- the Comité sectoriel de main-d'œuvre dans la fabrication métallique industrielle (Perform), which covers shipbuilding.

2.2. Environmental challenges and opportunities

2.2.1. Ecosystems to be protected

The St. Lawrence River is located in the heart of one of the biggest industrial, urban and agricultural poles in North America. It is subject to extensive pressure, in particular the construction of numerous dams on its tributaries, the filling of wetlands, shoreline hardening and erosion, dredging and shipping traffic. Such pressure has specific or cumulative effects on which are superimposed the impacts of climate change. This, in turn, has repercussions on the quality of ecosystems, some of which are deemed to be outstanding (see **box 10**).

Box 10: OUTSTANDING ECOSYSTEMS THAT IT IS IMPORTANT TO PROTECT

- The exceptionally varied marine wildlife in the Lower St. Lawrence Estuary is especially sensitive to disturbances of its environment, including the population of belugas, a protected species in decline.
- The state of health of the ecosystems in Lac Saint-Pierre, which is recognized as an internationally significant wetland area under the *Ramsar Convention*³⁹ and as a UNESCO World Biosphere Reserve, is especially worrisome. Furthermore, a moratorium has been declared on yellow perch fishing to limit harvesting of a population in great difficulty.
- The state of fish populations such as yellow perch in Lac Saint-Pierre clearly reflects the pressures stemming from human activities and efforts to limit their impact. The populations are, in a manner of speaking, a barometer of the state of the St. Lawrence River. Such indicators are also highly visible and concrete for the public.

Several initiatives are under way to better protect marine ecosystems. For example, in June 2013, the government launched an initiative aimed at elaborating a shared perspective of the situation in Lac Saint-Pierre by the governmental and regional interveners concerned and by supporting the drafting of concerted action plans.

If Lac Saint-Pierre is subject to particular attention, the government also recognizes that the protection and restoration of quality wildlife habitats is a key to adequately protecting biodiversity and ecosystems in the rest of the St. Lawrence River.

It should be noted, moreover, that the construction of the shipping channel on the St. Lawrence River required the dredging of millions of cubic metres of sediment, thereby permanently altering the river's bathymetry, hydraulic dynamics and physical chemistry. The shipping channel, which concentrates half of the St. Lawrence River flow, is a habitat that is now an integral part of the river's physical structure. It hosts 27 fish species, a community that is separate from other riverine habitats. Certain species, such as lake sturgeon, channel catfish, sauger and yellow walleye, are important for fisheries, which underscores the importance of pursuing and enhancing mitigation measures aimed at protecting the quality of ecosystems.

³⁹ UNESCO. [www.unesco.org/new/en/natural-sciences/environment/ecological-sciences/biosphere-reserves/europe-north-america/canada/lac-saint-pierre/].

2.2.2. The fight against aquatic invasive species

The St. Lawrence River is also highly exposed to aquatic invasive species through maritime transport, sport-fishing or direct introduction. It is connected to the Great Lakes and the Atlantic as well as river networks farther south such as the Mississippi River through Lake Michigan and the Hudson River through Lake Champlain. The links can also become sources of aquatic invasive species. The connection with the Mississippi in particular is especially worrisome since it is an access route for Asian carp. Aquatic invasive species have deep-seated repercussions on ecosystems and indigenous fauna. They also affect the economy, salubrity and public security.

The Québec government is assuming its share of responsibility in light of the complex question of aquatic invasive species but it is a major challenge since several types of stakeholders must work together. For example, the government recently adhered to the new *Mutual Assistance Agreement* that commits the American states bordering the Great Lakes, Ontario and Québec to assist each other in combating aquatic invasive species. Substantial means are being devoted to combat the species. By way of an example, it should be noted that different levels of government in the United States are investing more than \$100 million annually to combat the threat posed by Asian carp alone.

2.2.3. The establishment of marine protected areas

Québec has also recently prioritized increasing the number of marine protected areas. It now has two such areas⁴⁰ the Saguenay–St. Lawrence Marine Park, established in 1998, and the proposed Manicouagan aquatic reserve, designated in 2013. The two protected areas cover roughly 1.3% of Québec's sea area, i.e. 1 958 km². What is more, in April 2011, the Québec government adopted new strategic directions pertaining to protected areas. In particular, it committed itself to protecting 10% of the estuary and the Québec portion of the Gulf of St. Lawrence, which represents an area of roughly 14 500 km², with a view to attaining the international commitments under the Convention on Biological Diversity.

2.2.4. Risk management related to maritime transport

The transportation of hazardous materials by road, rail or maritime transport or by pipeline, poses specific challenges from the standpoint of safety. While navigation on the St. Lawrence River is safe and meets the most stringent international requirements, risk management related to this type of transportation requires the coordination of the response plans of the municipal, provincial and federal authorities concerned.

Considering the anticipated increase in shipping traffic of hydrocarbons and commodities in the coming decades on the St. Lawrence River and in Arctic waters, it will indeed be necessary to constantly update government prevention, preparation and response programs. This constant updating will be essential to take into account new risk management approaches, new knowledge and special regional climatic or ecological conditions.

Furthermore, various initiatives now under way include specific sections devoted to questions related to maritime transport of hazardous materials. In particular, the *Government Action Plan on Hydrocarbons* includes the production of two strategic environmental assessments (SEAs), i.e. a comprehensive assessment of the entire hydrocarbon option and a specific assessment of the Île d'Anticosti.

The SEAs are intended, in particular, to examine prevention, preparation and response measures in the event of a major accident.

They measure, among other things, the response capability of the organizations concerned according to their roles and responsibilities. Special attention will be paid to the communities and municipalities concerned by the maritime transport of hydrocarbons and compliance with the approach and the principles of emergency preparedness in Québec for the management of disasters.

What is more, an emergency measures committee that assembles the government departments concerned and municipal representatives, was established in February 2015 to determine possible improvements to cope with existing and emerging emergency management risks in Québec. One of the committee's key mandates is to assess and enhance, where warranted, the tools intended for the municipalities to support them in preparing to manage such risks.

⁴⁰ A protected area is a geographically delimited territory in a terrestrial or aquatic environment in respect of which the legal oversight and administration seek specifically to ensure the protection and maintenance of the biological diversity of the natural and cultural resources associated with it. MDDELCC.
[www.mddelcc.gouv.qc.ca/biodiversite/aires_protegees/registre/].

2.2.5. Combating climate change

Climate change has a significant impact on natural aquatic environments, on banks and on infrastructure and coastal communities in Québec's maritime territory. It should be noted that climate change is contributing to the erosion and submersion of coasts. This important phenomenon is appearing with growing acuteness in the Côte-Nord, Gaspésie-Îles-de-la-Madeleine and Nord-du-Québec regions.

To contribute to combating climate change, Québec has adopted a greenhouse gas reduction target in 2020 of 20% below the 1990 level. It has also established a carbon market from which all revenues are reinvested in the implementation of GHG reduction measures, in particular in transportation and industrial activities and adaptation to the impact of climate change.

In 2011, the transportation sector, which relies extensively on petroleum products, accounted for nearly one-third of total energy consumption in Québec. This sector encompasses the consumption of all modes of transportation, including road, air, rail and maritime transport and pipelines. Freight transportation alone accounts for 39% of such energy consumption. Seaborne freight transport accounts for barely 5%⁴¹.

There are several programs to combat climate change within the framework of the *2013-2020 Climate Change Action Plan*⁴² related to the *2015-2020 Action Plan of the Maritime Strategy*.

Two of the programs support projects in the maritime sector and enhance the industry's competitiveness:

- the Programme visant la réduction ou l'évitement des émissions de GES par le développement du transport intermodal (PREGTI), which seeks to reduce or avoid GHG emissions generated by freight and passenger transportation through the implementation of intermodal projects and the promotion of maritime and rail services. For the period 2013 to 2020, \$82 million has been allocated under the *2013-2020 Climate Change Action Plan*.
- the Programme d'aide à l'amélioration de l'efficacité du transport maritime, aérien et ferroviaire en matière de réduction des émissions de GES (PETMAF). For the period 2013 to 2020, \$50.2 million has been allocated under the *2013-2020 Climate Change Action Plan*.

The programs, which are under the responsibility of the Ministère des Transports du Québec, are entirely in keeping with the pursuit of the objectives of the Maritime Strategy. Indeed, in addition to contributing to enhancing the environment by resorting to modes of transportation that emit less GHG, the projects supported under the programs are developing short sea shipping, proposing new intermodal solutions to shippers and bolstering the competitiveness of Québec's maritime sector. The incentives are also improving the energy balance of the businesses that rely on this mode of transportation.

The future modernization of ships and handling equipment will also allow for the use of less energy-consuming technologies or cleaner fuels such as liquefied natural gas (LNG) or electricity. Accordingly, three new ships⁴³ that the Société des traversiers du Québec has ordered will reduce by 20% GHG emissions in relation to the diesel-powered vessels that they will replace. Moreover, the vessels of private shipowners could also adopt this new fuel option.

GHG emissions attributable to maritime transport will soon be reduced following the adoption by the federal government of new maximum sulphur contents for the production, importing and sale of marine fuel used by ships on Québec's navigable waterways. The regulation imposes the replacement of heavy fuel oil by marine diesel fuel, LNG or other cleaner energy sources.

2.3. Social challenges and possibilities

2.3.1. The quality of life of riverside populations and the protection of coastal environments

The quality of life of riverside populations from the standpoint of health, safety and pleasure boating or cultural attachments is a basic factor to be considered in the elaboration of Québec's *Maritime Strategy*.

There is good reason, for example, to continue focusing on the erosion of the banks of the St. Lawrence River, a significant phenomenon that is becoming increasingly acute on the shoreline of the maritime territory downstream from Québec City. While water levels and shipping traffic are likely to contribute to exacerbating the problem of erosion on the St. Lawrence River shoreline, upstream from Québec City the intensification of erosion observed in recent years in the maritime territory is not linked to shipping traffic. Instead, it is attributable

⁴¹ HEC Montréal. *État de l'énergie au Québec*, 2015, p. 17, [energie.hec.ca/wp-content/uploads/2014/12/EEQ2015_FINAL_2015.pdf].

⁴² MDDELCC, [www.mdclcc.gouv.qc.ca/changements/plan_action/pacc2020.pdf].

⁴³ Two ships will be assigned to the Tadoussac-Baie-Sainte-Catherine crossing and the third one will link Matane-Baie-Comeau-Godbout.

to climate change that is resulting in more frequent, more intense maritime storms, reduced winter ice over, an increase in freezing/thawing cycles, and a rise in sea level. Moreover, direct intervention on the banks of the St. Lawrence River overall is aggravating erosion by altering the coastal dynamics⁴⁴.

Forecasting, monitoring and regularization of the levels of the St. Lawrence River are important since they can affect certain flood-prone areas⁴⁵ or the erosion of the banks. In the same way, climate change impacts on sea level and the dynamics of submersion and coastal erosion⁴⁶ must be assessed. All of these parameters must also be considered in the construction of marine infrastructure

young people to build on their expertise acquired during increasingly lengthy studies is also a motivating factor.

Other factors also encourage young people to settle in the regions. Certain towns and villages can thus bank on their assets, especially in maritime zones, to attract young people wishing to live close to nature or engage in outdoor activities. The availability of local services intended for young families such as childcare centres, educational institutions and businesses, can also be a decisive factor when young people choose a living environment. It is with this in mind that the quality of life, which the next section examines, can promote the attraction and retention of young people.

2.3.2. Harmonious cohabitation between economic activities and communities

The search for harmonious cohabitation between port operations and urban life is a challenge that the *Maritime Strategy* must consider. It should be noted in this respect that for historic and economic reasons, the main port facilities are located near Québec's biggest cities.

Furthermore, an array of legal and regulatory provisions seeks to protect the integrity of Quebecers' living environment with respect to development projects in the maritime territory.

This is true, among other things, of the *Environment Quality Act* (chapter Q-2), the hearings and recommendations of the Bureau d'audiences publiques sur l'environnement (BAPE), the *Sustainable Development Act* (chapter D-8.1.1), the *Act respecting land use planning and development* (chapter A-19.1), and government policy directions concerning the consultation of the Aboriginal communities.

2.3.3. Job creation and the retention in the regions of young people

To encourage young people to settle in its territory, a region must bank on the quality of life that it can offer them. The key criterion considered is the prospect of their finding employment in the region. The tourism, agri-food, fishing and aquaculture industries offer worthwhile employment prospects. That they enable

⁴⁴ MDDELCC.

⁴⁵ Centre d'expertise hydrique du Québec. *Zones inondables*. [<http://www.cehq.gouv.qc.ca/zones-inond/>].

⁴⁶ Stratégies Saint-Laurent. *Érosion côtière*. [<http://www.strategie-sl.qc.ca/dossiers-et-projets/erosion-cotiere/>].





Photo : Courtesy of the Comité sectoriel de la main-d'œuvre de l'industrie maritime

KEY POLICY DIRECTIONS

A vision for the future

By the year 2030, the Maritime Strategy will enable Québec to fully, sustainably build on its know-how and maritime assets.

Through this vision, the government is revealing what Québec's maritime sector will be over the next 15 years. It is indicating the path to follow so that everyone works **together** to make Québec a **prosperous** maritime nation focused on the **future**.

Two underlying principles

The government wishes to ensure that the *Maritime Strategy* contributes to progress and development in all of Québec's regions. It is important that such development be socially acceptable and that the communities concerned be involved in it. The government also wishes to pursue an exemplary sustainable development approach that contributes to the betterment of the population and preserves for future generations the assets and potential uses of the maritime territory.

For this reason, the government is establishing two core principles to guide its action:

- a **planned, integrated** approach that involves different levels of government and civil society as a whole, including, in particular, investors, entrepreneurs, researchers, communities, including the Aboriginal communities, and so on;
- a **sustainable development** perspective, i.e. the harmonious cohabitation of the economic, environmental and social dimensions.

Three strategic directions

The government has adopted three strategic directions to define its priority initiatives. The strategic directions will guide the government and its partners in the implementation of the *Maritime Strategy* and the *2015-2020 Action Plan*. Accordingly, in light of the long-term vision that it has adopted and the core principles that it has defined, the government is prioritizing the following strategic directions:



sustainably develop the maritime economy



protect the maritime territory and its ecosystems



enhance Quebecers' quality of life

The key policy directions will structure the choices of strategic priorities that the government intends to implement to attain the economic, environmental and social objectives of the *Maritime Strategy*.



SUSTAINABLY DEVELOP THE MARITIME ECONOMY

To support the development of Québec's maritime economy, it is important to consolidate existing jobs in viable industries and promote the growth of maritime economic sectors that offer growth potential and ensure that coastal regions and the rest of Québec fully benefit from them.

The *Maritime Strategy* seeks to promote by 2030 the creation of more than **30 000 new direct jobs** and to encourage public and private investments of roughly \$9 billion. To this end, the Québec government will foster the creation of business opportunities linked to the maritime economy. Through its initiatives, the government intends to play a decisive role to promote investment opportunities for businesses that will generate jobs and economic growth, in a sustainable development perspective. With that in mind, it must create favourable conditions both in respect of transportation and other sectors linked to the maritime economy.

It has, therefore, adopted 10 strategic priorities:

- **PRIORITY 1** Invest in infrastructure
- **PRIORITY 2** Establish logistical hubs
- **PRIORITY 3** Develop industrial port zones
- **PRIORITY 4** Support Québec shipyards
- **PRIORITY 5** Develop short sea shipping
- **PRIORITY 6** Develop and modernize maritime tourism
- **PRIORITY 7** Modernize and ensure the long-term survival of the fishing and aquaculture industry
- **PRIORITY 8** Train and develop skilled labour
- **PRIORITY 9** Foster the development of knowledge in the maritime sector
- **PRIORITY 10** Engage in the international promotion of Québec's maritime industries

While these strategic priorities are presented in the chapter devoted to economic matters, it should be noted that the *Maritime Strategy* is an integrated strategy and that the measures explained in detail below also reflect environmental protection in Québec's maritime territory and its ecosystems and the fulfilment and betterment of communities. Several of the measures are horizontal in nature.

PRIORITY 1

Invest in infrastructure

The government will support the investments in port and commercial infrastructure planned by Québec's port administrations.

The port administrations estimate at more than **\$2 billion**⁴⁷, their investment needs over the next 10 years in order to take advantage of the tremendous growth potential in international trade, remain competitive at the international level, and avoid the loss of market share.

It is, ultimately, the competitiveness of a large part of Québec's economy that is at stake along with its competitive positioning on the international scene. While the maritime industry is, by its nature, a significant employer, it also has an important structuring effect, in particular on the development of industries related to the maritime industries, especially on logistics chains. Some examples are the mining industry and aluminum, in respect of which supplies and equipment or raw materials shipments rely almost entirely on maritime transport, or the manufacturing sector, which makes extensive use of maritime transport for its exports. What is more, world-class port infrastructure is necessary to develop maritime tourism, including international cruises.

To support the growth of port operations, the Québec government intends to offer assistance to accelerate investments in Québec's commercial port infrastructure.

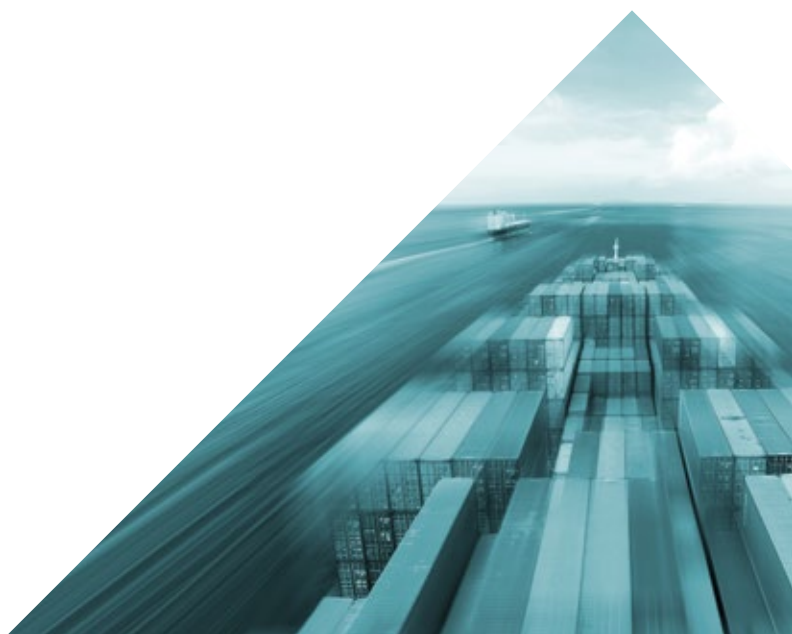
First, it will establish a new program to support port and intermodal infrastructure projects in the freight transportation sector. The government alone will invest **\$200 million** over five years in the new program, which the Ministère des Transports will administer. Second, provision will also be made for support initiatives for the **construction of road access to port and multimodal** sites in respect of public infrastructure related to the logistical hubs and to build tourism infrastructure, such as cruise terminals. The latter initiatives represent **\$300 million** over five years.

Accordingly, during the first five years of the strategy, the Québec government's financial participation to enhance infrastructure in the maritime sector will stand at some **\$500 million**. It will also support some **1 500 jobs**, during the infrastructure construction phase. What is more, the measures will also have significant leverage effect on participation by municipal bodies, the federal government and private companies. The Québec government's assistance will be reassessed until 2030 during the *Maritime Strategy*'s rollout. It should be emphasized that the measures will also satisfy needs related to maritime tourism development.

The infrastructure's design must integrate measures to adapt to climate change, including, in particular, the review of the St. Lawrence River's flood-prone areas. The government will review the zones. Furthermore, to consolidate the Montréal area's strategic position as a freight transportation hub, it is essential to promote the smooth flow of traffic on road and freeway networks, especially to access Autoroute 30.

Lastly, Québec will focus in particular on the new **federal government port transfer program** that Ottawa is elaborating.

⁴⁷ MTQ.



2015-2020 ACTION PLAN

Enhance marine infrastructure

- › Establish a new program administered by the Ministère des Transports du Québec to support port and intermodal infrastructure projects related to freight transportation. *Budget 2015-2016* has earmarked \$200 million for this purpose.
- › Offer more than \$300 million in financial support to build road access routes to port and multimodal sites, public infrastructure related to logistical hubs, and tourism infrastructure.
- › Work with the federal government to optimize its participation in Québec's port site, in particular within the framework of the *New Building Canada Plan*.
- › Increase top-up funding from the private sector in port sites by modernizing them and expanding their capacity.
- › Review flood-prone areas along the St. Lawrence River.

PRIORITY 2

Establish logistical hubs

The government intends to rely on Greater Montréal's **strategic geographical location** to contribute to the development of logistical hubs (see **box 11**).

Box 11: LOGISTICAL HUBS

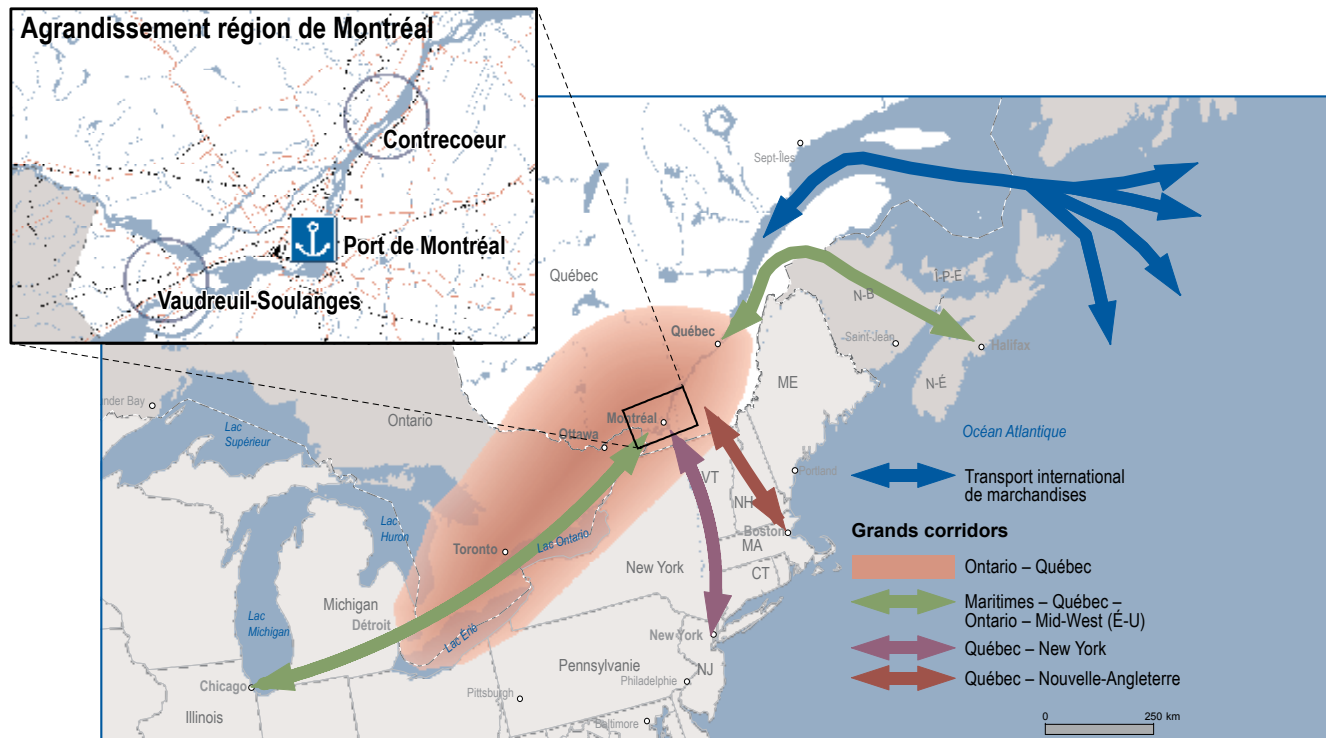
- A logistical hub is a multimodal industrial park that mainly assembles businesses and distribution centres that engage in logistical operations to ensure the efficient distribution of goods on domestic and international markets.
- The concentration of companies in a logistical hub makes it possible to offer high added-value services related to customs and financial transactions, the integration of the information and communications technologies (ICTs), hiring and manpower training, research and development, and so on.

Indeed, the *Maritime Strategy* seeks to position Québec as a gateway to northeastern North America. As **figure 10** shows, the Montréal area is located at the heart of **major trade corridors in the Northeastern United States**. Within Canada, Greater Montréal can deem the **Ontario-Québec trade corridor** as a port hinterland.

One objective of establishing logistical hubs is to further integrate the logistics chain of transit cargo destined, in particular, for these major markets in order to provide added value generated by Québec manpower and know-how. Moreover, certain sites in the Montérégie region are well-positioned to establish in a **complementary manner** such hubs, including Vaudreuil-Soulanges and Contrecoeur.

By 2030, an estimated **11 000 people could be working** in the two logistical hubs.

Figure 10 Major North American trade corridors



Frontières

---	Frontière internationale
---	Frontière interprovinciale
---	Frontière Québec - Terre-Neuve-et-Labrador (cette frontière n'est pas définitive)

Sources

Données
Divisions territoriales
Grands corridors

Organisme	Année
MERN	2015
MCE	2015

Réalisation

Ministère de l'Énergie et des Ressources naturelles
Ministère du Conseil exécutif
Note : La présente carte n'a aucune portée légale.
© Gouvernement du Québec, 2015

The government is seeking, in particular, the establishment of the added-value distribution centres of international firms operating in the manufacturing and retail trade sectors and is proposing a vision of the development of logistical hubs that satisfies specific markets or needs.

This vision focusing on job and wealth creation for Québec seeks to:

- accelerate investments in value-added distribution centres to facilitate the processing in Québec of a greater volume of freight transiting through rail or port terminals;
- open new export markets for products manufactured in Québec through access to new distribution routes;
- plan and better coordinate the development of logistical operations and thereby create synergy between industry stakeholders;
- enhance the logistics chain of Québec manufacturing enterprises through the mastery of specialized technologies and services.

The potential investments and job creation are significant. For example, for the period 2015-2020, it is anticipated that the Vaudreuil-Soulanges and Contrecoeur hubs will create nearly 1 800 direct jobs. By 2030, an estimated 11 000 people could be working in the two logistical hubs.

Budget 2015-2016 makes provision for a \$400-million allocation over the next five years to support the best projects to implement logistical hubs in Québec. The Québec government and the Fonds de solidarité FTQ will provide \$200 million and \$100 million, respectively, for equity participations in businesses wishing to invest in the logistical hubs. What is more, provision has been made for a committee comprising representatives of the government and the Fonds de solidarité FTQ to analyze the projects.

The government also intends to earmark \$100 million for funding public infrastructure projects linked to the logistical hubs.

Aside from its desire to create logistical hubs in the Greater Montréal area, the Québec government intends to support the development of the logistics and transportation cluster, one of the seven major industrial clusters that economic players in the Montréal area have recognized for their vitality. A number of businesses that are part of the hubs rely on their proximity and operations in the Port of Montréal. The interrelationship between the Port of Montréal and the businesses

is in itself a productive, competitive regional innovation system that it is important to consolidate and expand.

The government will, to this end, seek the support and collaboration of CargoM, a steering committee that seeks to assemble all interveners in the logistics and freight transportation sector in Greater Montréal. The support of the cluster also falls within the scope of the Greater Montréal development strategy.

2015-2020 ACTION PLAN

Create logistical hubs

- › Promote the establishment of logistical hubs with the support of partners. To this end, *Budget 2015-2016* earmarks a \$400-million allocation over five years:
 - \$300 million for equity participations in logistical hub projects:
 - > \$200 million from the government;
 - > \$100 million from the Fonds de solidarité FTQ;
 - \$100 million is reserved by the government to satisfy public infrastructure needs related to logistical projects.
- › Promote Québec's logistical hubs in Canada and abroad.
- › Support the logistical and transportation cluster in collaboration with CargoM

PRIORITY 3

Develop industrial port zones

The government intends to adopt a **new approach** to revitalize the Québec economy, especially the manufacturing sector, by **developing industrial port zones** in order to create roughly **3 000 direct jobs**. Industrial port zones will foster greater synergy between the businesses that are part of

them and offer a competitive advantage to firms that require port services. On the whole, the industrial port zones will increase Québec exports through better integration of manufacturing firms into global supply chains (see **box 12**).

Box 12: INDUSTRIAL PORT ZONES

- An industrial port zone is an industrial zone near port services but also includes road and rail infrastructure. Such proximity offers businesses a significant comparative advantage, especially manufacturing concerns. From the standpoint of logistics, an industrial port zone enables the companies established there ready access to inputs and accelerated transiting of the goods produced to North American and international markets.
- What is more, the zone is designed to maximize potential synergy between port services and maritime and allied industries such as manufacturing, processing, and so on.
- In short, an industrial port zone is organized in such a way that the industries can take advantage of operational facilities, enhance the efficiency of their logistical operations or share port infrastructure and services.

By relying on Québec's strategic commercial port system, the government will support private investments intended to develop industrial port zones. It will thus foster the emergence of manufacturing projects that are the most likely to benefit from the proximity of port services.

In practical terms, the *Maritime Strategy* is targeting private industrial investments of more than **\$2.4 billion de dollars** between 2015 and 2030.

The government will draw on a **\$300-million allocation**⁴⁸ over five years from the Economic Development Fund⁴⁹ to promote industrial investment projects in the industrial port zones.

The major industrial investments in the port sectors will maximize the use of Québec's infrastructure. Moreover, production sites are being drawn closer to goods shipping and raw materials reception sites in order to reduce environmental nuisances and maintenance costs stemming from reliance on the road network for the commercial and industrial transportation of goods.

⁴⁸ *Budget 2015-2016, The Québec Economic Plan, B. 167.*

⁴⁹ The Economic Development Fund (EDF) is a preferred vehicle by the government to carry out structural interventions for the benefit of Québec's economic development. The sums allocated to this fund are administrated by Investissement Québec, a public society under the responsibility of the Ministry of Economy, Innovation and Exports, whose mandate is to contribute to Québec's economic development, stimulate investment and support employment in all regions of Quebec.

The government's approach will be carried on in stages. The first stage will seek to identify the potential zones that allow for the development of industrial port zones. Subsequently, the key stakeholders will be called upon to elaborate development plans that make it possible to pinpoint potential markets.

Below are the impending initiatives to develop industrial port zones:

- identify industrial port zones;
- elaborate development plans;
- pinpoint potential markets;
- financially support private investment projects;
- decontaminate industrial lots under the responsibility of the Québec government;
- promote the industrial port zones and investment prospecting both in Québec and abroad.

An interdepartmental coordinating committee (see Section 7.1) will, among other things, match private and public investments financed under the new assistance program for port and intermodal infrastructure projects.

2015-2020 ACTION PLAN

Develop industrial port zones

- Financially support private investment projects in Québec's industrial port zones through a \$300-million allocation in the Economic Development Fund (EDF).
 - Pinpoint industrial port zones in light of the following criteria: the proximity of a port that offers the requisite technical and economic characteristics, the scope of the logistical link between the zone's industrial activities and the port, and the industrial synergy potential within the zone.
 - Assemble the key stakeholders and elaborate industrial development plans, in particular by defining each of the industrial port zones.
 - Pinpoint potential markets.
- Decontaminate land for which the government is responsible to make it available for investments in the industrial port zones.
- Promote the industrial port zones and investment prospecting abroad.



PRIORITY 4

Support Québec shipyards

Given the importance of the shipbuilding industry to the Québec economy, the support services that it offers maritime transport and the international business context characterized by falling ship prices, the Québec government will continue to **support Québec shipyards**.

To this end, the government will maintain the refundable tax credit for shipbuilders in Québec.

The Québec government will work with the federal government to ensure that Québec shipyards participate in the renewal of the Canadian ship fleet.

2015-2020 ACTION PLAN

Support Québec shipyards

- › Offer an additional capital cost allowance of 50% to Québec shipowners for shipbuilding or renovation carried out by Québec shipyards.
- › Offer a tax-free reserve to Québec shipowners to finance ship maintenance, renovation or construction carried out by Québec shipyards.
- › Maintain the refundable tax credit for the construction or refitting of ships.
- › Pinpoint other financial means to help the shipbuilding industry, in particular alternatives to the surety and guarantees respecting shipbuilding.
- › Work with the federal government to ensure that Québec shipyards participate in the renewal of the Canadian ship fleet.
- › Earmark \$50 million from the Economic Development Fund to develop Québec shipyards.

PRIORITY 5

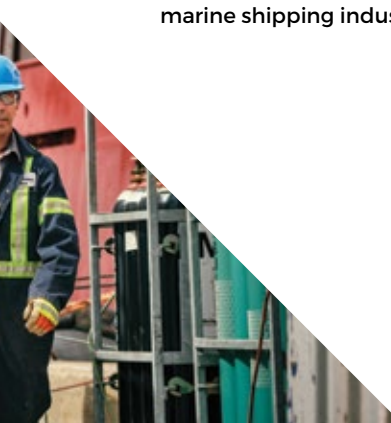
Develop short sea shipping

The government wants **short sea shipping to achieve its full potential**. The development of short sea shipping is not only economically beneficial but also environmentally beneficial since it allows for a reduction in air pollution emissions in relation to other modes of transportation, and socially beneficial since it promotes regional economic development and facilitates the delivery of supplies to communities poorly served by land.

The government will support the identification of potential development niches, including liquefied natural gas (LNG). It will also foster the development of short sea shipping by means of fiscal measures aimed at helping the Québec marine shipping industry to modernize and renew its fleet.

The fiscal measures, announced in *Budget 2014-2015*, make provision for an additional capital cost allowance of 50% and the creation of a tax-free reserve intended for Québec shipowners (see strategic priority 4).

The short sea shipping industry is also eligible for other government programs that the MTQ administers, such as the Programme visant la réduction ou l'évitement des émissions de GES par le développement du transport intermodal (PREGTI) and the Programme d'aide à l'amélioration de l'efficacité énergétique dans le transport maritime, aérien et ferroviaire (PETMAF). The assistance offered to the maritime sector overall under the programs stands at some \$35 million over the next five years (see Section 2.2.5).



2015-2020 ACTION PLAN

Contribute to the development of short sea shipping

- › Assign to the Table du Québec sur le transport maritime courte distance a mandate to conduct a study to pinpoint potential development niches and conditions for success.
- › Encourage reliance on maritime transport to ship alternative energy sources, including liquefied natural gas (LNG).
- › Maintain assistance programs and tax incentives that support the short sea shipping industry, in particular.

PRIORITY 6

Develop and modernize maritime tourism

The government will promote the development and modernization of maritime tourism in Québec. It has already adopted means of action with the *Stratégie de mise en valeur du Saint-Laurent touristique 2014-2020*, including a 2014-2017 action plan⁵⁰. The strategy seeks to make tourism an efficient, innovative, sustainable industry that exercises a leverage effect on Québec's economic development by offering an original, must-see destination to international, Canadian and Québec clientele.

By 2030, the government will continue to **develop its tourism offerings in order to attract greater numbers of international cruises**. While there is keen international competition between destinations, Québec has adopted an enviable position, for example through its tourist attractions, but also its know-how.

To pursue the improvement of reception facilities for international cruises, *Budget 2015-2016* makes provision for an additional investment allocation of up to **\$55 million over** the next five years to help fund two major projects in Montréal and in Québec City. Accordingly, the government will contribute to the rebuilding for tourism purposes of the maritime terminal and the Alexandra Pier in Montréal (\$20 million) and the proposed reconfiguration and expansion of the Ross Gaudreault cruise terminal in Québec City (\$35 million).

Moreover, the government announced in *Budget 2014-2015* a **\$31-million** contribution to redevelop the Dalhousie site in Québec City. The project will enable Québec City to offer

tourists on stopovers a distinctive image and restore access by residents of the Capitale-Nationale to the river.

The government has also set aside in *Budget 2014-2015* **\$30 million** to cover investments totalling \$80 million over three years to fund tourist projects that will be developed along the shore of the St. Lawrence River. Eligible projects focus on port infrastructure and tourism infrastructure. The rebuilding of a wharf, the expansion of passenger boarding areas, the construction of buildings to accommodate cruise passengers or projects to expand or modernize a tourist attraction are examples of initiatives that the program could support.

Furthermore, the government intends to support initiatives that develop, in particular, cruise-excursions, marine wildlife excursions and natural and heritage sites in order to enhance the itineraries and programs of tour operators. This will benefit all coastal regions of Québec, especially the Saguenay-St. Lawrence Marine Park.

Several establishments of the Société des établissements de plein air du Québec (Sépaq) are well-positioned to facilitate the use of the St. Lawrence River for the purposes of tourism development and job creation in several of Québec's regions. The government will, therefore, support investments of **\$21.6 million** over five years to develop establishments that have the potential to offer original, world-class tourism products and to establish partnerships, in particular with Montréal and the Société des traversiers du Québec.

⁵⁰ Gouvernement du Québec. *Stratégie de mise en valeur du Saint-Laurent touristique 2014-2020 et plan d'action 2014-2017 – le Saint-Laurent, du fleuve à la mer, 4 000 km de découvertes*, Tourisme Québec, Québec, february 2014, 76 pages. [www.tourisme.gouv.qc.ca/publications/media/document/publications-administratives/strategie-saint-laurent.pdf].

The government also intends to take advantage of the **revival of the Plan Nord** to pursue the development of maritime tourism, in particular during recognized cruise stopovers along the 49th parallel.

Development initiatives in the sector will be encouraged in partnership with local bodies.

Lastly, through the Ministère de la Culture et des Communications (MCC), the government will guide bodies wishing to **develop their built heritage or facets of the**

maritime landscape likely to be of greater interest to tourists, especially cruise passengers.

With that aim in mind, the government intends, in particular, to support initiatives to develop the maritime heritage under the MCC's cultural development agreements with local and regional municipalities. It has earmarked \$750 000 by 2020 for this purpose. The investment will have a leverage effect that may generate equivalent contributions from partners for a total investment of \$1.5 million.

2015-2020 ACTION PLAN

Develop and modernize maritime tourism

- › Support the implementation of *the Stratégie de mise en valeur du Saint-Laurent touristique 2014-2020* and its 2014-2017 action plan.
- › Invest \$30 million over three years for tourism projects to be developed along the shores of the St. Lawrence River.
- › Offer \$86 million in funding to promote the expansion of maritime tourism by supporting cruise ship tourism in Montréal and in Québec City, including:
 - \$20 million to rebuild for tourism purposes the maritime terminal and the Alexandra Pier in Montréal;
 - \$35 million for the proposed reconfiguration and expansion of the Ross Gaudreault cruise terminal in Québec City;
 - \$31 million to redevelop the Dalhousie site in Québec City.
- › Allocate \$21.6 million to the development of certain natural attractions on the St. Lawrence River.
- › Establish a Bureau de l'offre touristique maritime using the Ministère du Tourisme's existing resources, whose expertise will be used to ensure the implementation of the tourism section of the *Maritime Strategy*.
- › Develop maritime tourism potential including recognized cruise stopovers along the 49th parallel by supporting the development projects of businesses and tourist reception projects.
- › Put to good use certain facets of the built heritage or the maritime landscape, in particular as regards the attribution of legal status to facets of the built heritage in towns with port infrastructure, in accordance with legal processes, to make them eligible for the Fonds du patrimoine culturel du Québec.
- › Attribute, starting in fiscal year 2017-2018 an allocation of \$250 000 per fiscal year over three years, for a total investment of \$750 000, to support initiatives to develop the maritime heritage of sites covered by cultural development agreements.

PRIORITY 7

Modernize and ensure the long-term survival of the fishing and aquaculture industry

To modernize and ensure the long-term survival of the fishing and aquaculture industry, the *Maritime Strategy* is proposing three development axes: marine biotechnology, aquaculture and sustainable fishing. Such support for the fishing and aquaculture industry reflects a perspective of the sustainable development of Québec's maritime economy, especially as regards the sustainability of fishery resources.

The *Maritime Strategy* will rely on the **latest advances in the realm of marine biotechnology**. To ensure the maintenance and continuity of Québec's skills in the field, the government will support marine research institutions such as the Marine Biotechnology Research Centre (MBRC), Merinov and the Institut des sciences de la mer de Rimouski (ISMER) (see Section 1.2.6).

Québec mariculturists legitimately use the aquatic environment in a spirit of respect for their environment. The *Maritime Strategy* will support **orderly, responsible aquaculture development** that fosters the optimization of existing production sites and seeks their social acceptability.

It is proposing a project that positions the St. Lawrence River at the heart of Québec's economic revival, especially for the Îles-de-la-Madeleine, in respect of which the government recognizes the importance of searching for and developing markets for conventional products such as seal. In this specific instance, doing so will make it possible to simultaneously manage the populations to allow fish stocks to thrive and to take advantage of this natural resource with high potential. Seal hunting is a sustainable activity in respect of which local populations have acquired longstanding know-how that respects Québec values and the resource's long-term survival.

By taking advantage of the archipelago's entrepreneurial skills, new outlets will be targeted to market the numerous products stemming from the industry, such as oil, meat or fur.

The long-term survival and development of the fishing sector hinges, in particular, on **the sustainable management of fishery resources**, which implies the preservation of their habitats and ecosystems. It is with this in mind that the government has established and fish habitat inventory

networks⁵¹ in the St. Lawrence River and estuary. It will pursue its efforts to update its knowledge on the state of the populations in order to make enlightened management decisions, which are essential to sustainable fisheries.

What is more, fishery products must meet increasingly stringent quality and sustainability standards to penetrate markets. The requirements are becoming increasingly difficult to attain, especially for businesses that are targeting international markets. To this end, the *Maritime Strategy* will support the efforts of fishing fleets that wish to obtain the requisite environmental certification to access such markets. It will be linked for this purpose to the *Plan d'action 2013-2018 : Développer notre industrie des pêches et de l'aquaculture commerciales*, a plan that proposes a coherent series of solutions to ensure the industry's development, competitiveness and long-term survival⁵².

In practical terms, the *Maritime Strategy* will support the initiatives of the Ministère de l'Agriculture, des Pêcheries et de l'Alimentation du Québec (MAPAQ), which **will promote the development of the commercial fishing and aquaculture sectors**. During the first three years of the *Maritime Strategy*, the initiatives will represent some \$15 million in financial support.

What is more, **the continuation and enhancement of the refundable tax credit for the Gaspésie region and certain maritime regions of Québec**, announced in *Budget 2015-2016*, will, in particular, support the processing of seafood products and continue to support the development of sea farming and products stemming from marine biotechnology in the Bas-Saint-Laurent, Côte-Nord, Gaspé Peninsula and Îles-de-la-Madeleine regions.

Lastly, the government **will maintain measures to encourage the new generation of workers**, such as the capital gains exemptions or the program for young fishermen, which offers them financial support to purchase their first business.

⁵¹ Portail de l'information géographique gouvernementale. [www.quebecgeographique.gouv.qc.ca/approfondir/bibliotheque/geoinfo/geoinfo-mars-2013.asp].

⁵² MAPAQ. [www.mapaq.gouv.qc.ca/fr/Publications/Planactionpechesaquaculture.pdf].

2015-2020 ACTION PLAN

Modernize and ensure the long-term survival of the fishing and aquaculture industry

- › Support the implementation of the *Plan d'action 2013-2018 : Développer notre industrie des pêches et de l'aquaculture commerciales*.
- › Support and rely on marine biotechnologies through organizations such as the Centre de recherche sur les biotechnologies marines (CRBM), Merinov or the Institut des sciences de la mer de Rimouski (ISMER).
- › Support fishing fleets that wish to obtain environmental certification.
- › Support efforts to ensure the sustainable management of fish stocks and other fishery resources.
- › Maintain measures to encourage the new generation of workers, such as capital gains exemptions and the program for young fishermen.
- › Maintain \$15 million in funding over the next three years to support the commercial fishing and aquaculture industry.
- › Extend the refundable tax credit for the Gaspé Peninsula and certain maritime regions of Québec.
- › Promote tourism on fishing boats.
- › Support initiatives aimed at reviving the seal industry.

PRIORITY 8

Train and develop skilled labour

The *Maritime Strategy* comprises two sections to meet manpower-related challenges, i.e. better respond to workforce training and skills development needs and more widely promote maritime trades.

The government, in cooperation with educational institutions and other education and training partners will **implement new types of training** to satisfy manpower requirements in promising sectors such as marine biotechnology, logistics and applied research. In the same way, it will ensure that needs stemming from new health, safety and environmental protection requirements are adapted to initial, ongoing and in-house training, and the secondary school, CEGEP and university sectors. It also intends to adopt measures **to better match the quality and scope of training and the industry's short and long-term labour needs**. The education sector will have a key role to play in this respect.

In addition, other initiatives will facilitate the implementation of training activities that will also satisfy the industry's one-off and structural needs. Accordingly, certain occupational and ongoing training programs will be re-evaluated or developed. This is true, for example, of the study program leading to the **secondary school vocational diploma in seamanship**.

Moreover, **\$15 million will be invested over the next five years to support employee skill development projects** and human resources management in the maritime sector. For example, projects that integrate cooperative education, work-based learning and internships will be elaborated. The problems and challenges that the sectoral manpower committees raise will guide the elaboration of the projects. The government

wishes to indicate its awareness of the challenges stemming from work-based learning. Accordingly, it is proposing in *Budget 2015-2016* the enhancement of the tax credit for an on-the-job training period offered to employers who accept students registered full time in occupational, technical or university training programs or programs to promote social and occupational integration or leading to semi-skilled trades.

To this end, the government will ensure broader consultation, especially between government departments, educational institutions, sectoral committees (see section 2.1.7) and representatives of employers in the maritime sector. **It will, therefore, establish in the short term a steering committee** in order to better match employers' needs and available training and support measures for employee skill development. The steering committee will also be responsible for encouraging and coordinating concrete projects aimed at better matching training, skills and employment in the maritime sector.

Furthermore, to help the tourism industry, the government will pursue its collaboration with its partners such as the Conseil québécois des ressources humaines en tourisme, which have already elaborated measures aimed at helping entrepreneurs to upgrade their skills and those of their workers. The measures will contribute to raising the level of professionalism in the tourism industry and, consequently, to spurring economic growth in the sector in Québec.

Lastly, the government will work with labour market partners and the education sector to **promote maritime trades**. In this way, it hopes to arouse interest in the jobs offered in different sectors of the maritime economy, especially among young people, by means of scholarships, the promotion of growing maritime sectors and the establishment of programs to assist the new generation of workers. *In Budget*

2015-2016, the Québec government announced \$6 million over three years to guide the new generation of workers, especially in the maritime sector. In this way, it intends to promote individual and collective entrepreneurship through more robust specialized services, in particular as regards the transfer of businesses and mentoring.

2015-2020 ACTION PLAN

Train skilled maritime workers and develop their skills

- › Create a steering committee to better match needs for skilled labour and the availability of training and support for skills development
- › Diversify and adapt training offerings in partnership with community interveners in the education sector, especially the school boards and specialized training centres such as the Institut maritime du Québec (IMQ) and the École des pêches et de l'aquaculture du Québec (ÉPAQ).
- › Elaborate a program of study leading to a secondary school vocational diploma in the realm of seamanship to satisfy the maritime industry's needs.
- › Promote occupations related to the maritime sector that offer sound prospects for integration into the labour market.
- › Invest \$15 million over the next five years in manpower skills development.



PRIORITY 9

Foster the development of knowledge in the maritime sector

The complexity of the challenges that the maritime sector poses requires an intersectoral, integrated approach. The responses to the challenges must be elaborated with the cooperation of all of the stakeholders in different sectors of scientific research. Québec is offering in this respect an extensive network of institutions focusing on maritime research and innovation (see Section 1.2.7).

Following the example of European “blue growth”⁵³, the *Maritime Strategy* intends to **broaden research and innovation carried out in Québec**.

To this end, it will enable researchers and research and development (R&D) to join forces to broaden the potential of Québec innovation chains⁵⁴, in partnership with local businesses and populations. The acquisition of a solid scientific foundation makes it possible to enlighten decision-makers and facilitate the reconciliation of different uses of maritime resources. The objective is to intelligently, sustainably develop maritime assets, a condition for success in the development of the maritime economy.

In this context, the government will establish the **Réseau Québec Maritime (RQM)**, which will assemble stakeholders in Québec’s maritime economy, including the universities, research centres, the government and industry. The network will make it possible to federate existing research and innovation structures and the variety of expertise required in order to cope with maritime challenges now and in the future. The RQM will be responsible for initiative and leadership and consensus building among researchers and partners and monitoring of the implementation of intersectoral programming of basic and applied research to support the objectives of the *Maritime Strategy*. The RQM’s deliberations could sustain those of the Institut nordique du Québec, an entity stemming from the revival of the Plan Nord.

Lastly, the *Maritime Strategy* proposes to attribute to the RQM **international collaboration projects with maritime nations and international organizations** whose expertise is relevant to the challenges that Québec is facing.

The **establishment of the Institut France-Québec** sur les questions maritimes marks the first international collaborative venture. France is the second biggest maritime nation in the world. Its governmental, non-governmental and university expertise ranks among the best in the world. The institute’s objective will be to establish a joint France-Québec forum dedicated to pooling expertise, knowledge, data, information and infrastructure in order to explore avenues for development and innovation by the two maritime nations.

Furthermore, the Americans can offer valuable opportunities to collaborate between businesses, researchers and government experts. This is true, for example, of the Water Council in Milwaukee and world-class research centres in Illinois, Wisconsin, Minnesota and Michigan, which are focusing on challenges similar to those in Québec.

The government will, therefore, encourage Québec centres of excellence to establish partnerships with American research centres, especially those in the states bordering the Great Lakes.

Québec’s participation in major international initiatives is important. The Québec government has participated since 2013 in the forward studies of the Organisation for Economic Co-operation and Development (OECD) concerning the ocean economy by the year 2030⁵⁵. The deliberations involve numerous OECD member states, including Norway, France and the United Kingdom. What is more, the Québec government intends to participate in other deliberations such as those within the framework of Horizon 2020, the eighth EU Framework Programme for Research and Innovation⁵⁶, the *Galway Declaration*⁵⁷ or the Future Earth program⁵⁸.

Québec’s contribution to such international deliberations will maximize the economic impact of interdisciplinary collaborative projects, the pooling of expertise at the international level, infrastructure cost-sharing, and the training of highly qualified workers.

Financial tools such as the Ministère de l’Économie, de l’Innovation et des Exportations’ research and innovation support measure will be profitably employed to support participation by international research teams in the initiatives by funding a portion of the Québec research linked to the projects. This measure, and the measure focusing on collaborative research projects with the industry, may also be called upon with respect to maritime-related research and innovation.

⁵³ European Commission, DG MARE. *Blue Growth – Scenarios and Drivers for Sustainable Growth from the Oceans, Seas and Coasts*. (2015-02-15) [<https://webgate.ec.europa.eu/maritimeforum/sites/maritimeforum/files/Blue%20Growth%20Final%20Report%2013082012.pdf>].

⁵⁴ The innovation chain is a process that encompasses a series of steps or links that facilitate the transition from an idea or an invention to research and its application or marketing.

⁵⁵ OECD. *The Future of the Ocean Economy. Exploring the Prospects for Emerging Ocean Industries to 2030*. [www.oecd.org/futures/oceaneconomy.htm].

⁵⁶ *Horizon 2020*, [ec.europa.eu/programmes/horizon2020].

⁵⁷ *Galway Declaration* [europa.eu/rapid/press-release_IP-13-459_en.htm].

⁵⁸ Future Earth, [www.futureearth.org].

What is more, since **applied research and innovation are ideal development tools for businesses**, the government intends to support such activities in partnership with private companies.

To better measure and target the first *Maritime Strategy's* **economic objectives, economic surveys will be conducted, especially to more effectively quantify and qualify activities related to Québec's maritime economy.**

2015-2020 ACTION PLAN

Promote the development of scientific knowledge

- › Establish the Réseau Québec Maritime (RQM), an organization that will assemble existing research and innovation structures and the array of expertise required to face maritime challenges. *Budget 2015-2016* has earmarked \$200 million for this purpose.
- › Establish and implement the Institut France Québec sur les questions maritimes, an association that will assemble leaders in France and in Québec in a common, jointly managed body dedicated to sharing expertise and knowledge. *Budget 2015-2016* has earmarked \$1.1 million for this purpose.
- › Provide \$4.1 million in direct financial assistance to support in-house innovation projects, especially in the marine biotechnology sector.
- › Support applied research and innovation, especially within the framework of partnerships with private companies, through a \$5-million allocation.
- › Pinpoint avenues to promote technology transfers.
- › Promote innovation, research and the establishment of new markets in the biological marine resources sector.
- › Conduct economic surveys to better quantify and qualify the entire array of activities related to Québec's maritime economy.
- › Encourage Québec centres of excellence to establish partnerships with international research centres.



PRIORITY 10

Engage in the international promotion of Québec's maritime industries

Within the framework of a comprehensive promotion and intervention plan abroad (see Section 7.4), the Québec government will **promote Québec's maritime industries in order to highlight their comparative advantages**. The *Maritime Strategy* will, in particular, make it possible to develop alliances and conclude international partnerships.

Québec's international initiatives within the framework of the *Maritime Strategy* will take different forms depending on the objectives sought and the stakeholders concerned. A cursory list would include:

- the search for foreign partners wishing to participate in Québec's economic development;
- the identification of export markets for goods and services produced by Québec firms for which there is demand outside Québec, bearing in mind, in particular, the territories targeted, specialty shows or strategic trade fairs in the targeted fields;
- the search for technological partners to enable Québec businesses to reduce their production costs and become more competitive at the international level;

- the conclusion of international alliances to enable Québec associations and institutions to develop and import the best business practices for the benefit of their members and stakeholders in the sector

The international initiatives of the *Maritime Strategy* should focus on:

- Europe: as a matter of priority France, Belgium, the United Kingdom and the Netherlands. Topics of interest: market development, natural resources, logistics and marine technologies;
- Asia: above all, China and India. Topics of interest: market development and natural resources;
- North America: first and foremost the Southeastern and Midwestern United States, Ontario and the Maritime Provinces. Topics of interest: market development.

What is more, since the *Maritime Strategy* relies extensively on the ability to attract foreign investors to Québec and on its distinctive advantages, the government will work, in particular, with port authorities to develop their main attractions.

2015-2020 ACTION PLAN

Engage in the international promotion of Québec's maritime industries

- Set aside \$1 million per year for five years from Export Québec's Programme Exportation to support the development of markets for Québec firms and niches of excellence associated with the areas of activity stipulated in the *Maritime Strategy*.
- Produce a strategy to attract direct foreign investments in Québec in collaboration with government departments and bodies, including the Ministère de l'Économie, de l'Innovation et des Exportations, the Ministère des Relations internationales et de la Francophonie and Investissement Québec.
- Promote Québec's commercial ports at the international level.

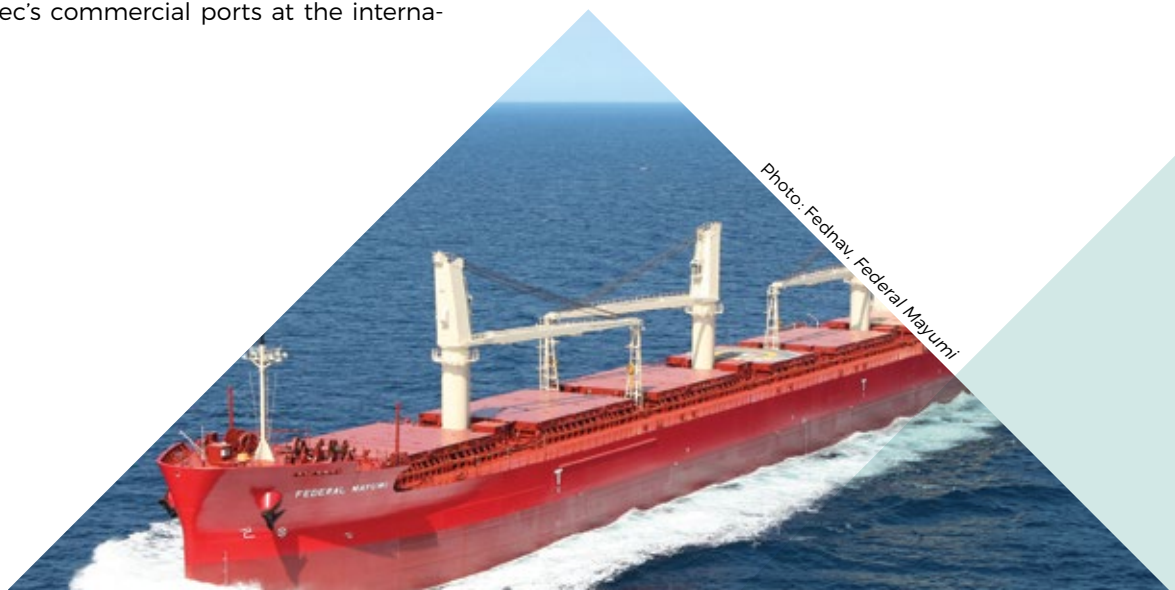


Photo: Fednav, Federal Mariner

THE MARITIME STRATEGY WILL CREATE JOBS AND WEALTH FOR QUÉBEC

By promoting public and private investments totalling some \$9 billion, the *Maritime Strategy* will support over its 15-year duration 30 000 direct jobs and 21 000 indirect jobs, for a total of 51 000 jobs. Under the first financial framework of the *Maritime Strategy*, \$2.9 billion will be invested in the economy, which will support 9 000 direct jobs and 6 500 indirect jobs, for a total of 15 500 jobs over five years. Worldwide growth in international trade in goods and the new Canada-Europe free trade agreement will justify such investments.

In particular, by 2030, the establishment of logistical hubs will total some \$3 billion in private investments, which will support 11 000 direct jobs. In the case of the industrial port zones, the investments will stand at some \$2.4 billion, which will support 3 000 direct jobs..

Moreover, several major private investment projects have been announced and should be carried out between 2018 and 2030. The two biggest projects, launched by federal port administrations, are the Contrecoeur (\$750 million) and Québec City (\$550 million) projects.

Public investment will have a leverage effect on the private sector. This is true, in particular, of the investments planned in the cruise terminals in Québec City and Montréal, and the proposed development of tourist sites by the Société des établissements de plein air du Québec (Sépaq).

In addition to the jobs linked mainly to construction work, the *Maritime Strategy* will support jobs stemming from the operation of the infrastructure and additional jobs engendered by the ripple effect or externalities in the manufacturing or retail distribution sectors.



Photo: gracieuseté de Groupe CSJ



PROTECT THE MARITIME TERRITORY AND ITS ECOSYSTEMS

The St. Lawrence River encompasses outstanding flora and fauna and the protection of the ecosystems in the maritime territory is, consequently, a key component of the *Maritime Strategy*. The measures adopted to this end will directly affect the quality and sustainability of marine resources and the safety and health of the population.

To this end, the government has adopted three strategic priorities:

- › **PRIORITY 1** Protect the biodiversity of freshwater and seawater ecosystems
- › **PRIORITY 2** Improve risk management related to maritime transport
- › **PRIORITY 3** Contribute to the fight against climate change

PRIORITY 1

Protect⁵⁹ the biodiversity of freshwater and seawater ecosystems

The government intends to pursue its efforts and **broaden its collaboration with the federal government and its partners**, in particular by encouraging initiatives such as the Green Marine program⁶⁰ in conjunction with the implementation of the *Maritime Strategy* to protect and preserve the ecosystems in Québec's maritime territory.

The government also intends to support the initiatives of the *St. Lawrence Action Plan*. What is more, it will support initiatives and all efforts **to protect Lac Saint-Pierre**, a jewel of the fluvial portion of the St. Lawrence River and a UNESCO World Biosphere Reserve. To this end, it will pursue the response strategy that it implemented to restore the quality of the Lac Saint-Pierre ecosystem and to ensure the sustainability of the fisheries associated with it⁶¹ (see Section 2.2.1).

The Québec government recognizes the importance of early detection, knowledge acquisition and consultation with a broad range of interveners to implement concrete action concerning the prevention, control and eradication of aquatic invasive species. It will structure **an approach aimed at affording Québec adequate response capability to counteract threats posed by aquatic invasive species, in particular Asian carp** from the Great Lakes.

Numerous plant and animal species at risk pursuant to provincial or federal legislation are associated with the St. Lawrence River. To ensure the long-term survival of such species and their habitats is contributing to the protection of the St. Lawrence River's biodiversity.

The government is also reiterating its determination to **fulfil the international commitments under the *Convention on Biological Diversity*** by establishing a representative network of marine protected areas such that the current marine protected area of 1.3% will reach at least 10% by 2020. The measure, initially planned for 2015, will be reached by 2020. It intends to step up in this respect its efforts to consult and negotiate with the federal government under the bilateral Canada-Québec deliberations now under way in the Bilateral Group on Marine Protected Areas..

⁵⁹ Used in the broadest sense, i.e. protect, preserve, restore and use in a sustainable manner.

⁶⁰ Green Marine is a voluntary environmental certification program for the North American marine industry.

⁶¹ MDDELCC. [www.mddelcc.gouv.qc.ca/eau/lac-st-pierre].





2015-2020 ACTION PLAN

Protect biodiversity and ecosystems

- › Attain the international commitments under the *Convention on Biological Diversity* by establishing, in collaboration with the federal government, a representative network of marine protected areas covering at least 10% of the sea area, for example, by adding in Québec marine protected areas that satisfy challenges related to biodiversity and species at risk in the St. Lawrence River, including the beluga.
- › Bring to fruition negotiations with the federal government leading to the creation of a marine protected area on the American Bank in the Gaspé Peninsula.
- › Pursue analyses and initiate a consultative process involving stakeholders in the Îles-de-la-Madeleine in order to designate a possible marine protected area.
- › Pursue the intervention strategy in Lac Saint-Pierre aimed at restoring the quality of the ecosystem and ensuring the sustainability of fishing there.
- › Structure an approach aimed at affording Québec adequate response capability to counteract threats posed by aquatic invasive species, in particular Asian carp from the Great Lakes. The approach includes prevention, early detection and control and eradication measures.

PRIORITY 2

Improve risk management related to maritime transport

Québec will collaborate closely with the Government of Canada to update the prevention, preparation and intervention program respecting maritime transport in Québec. Furthermore, the prevention and response measures that Québec will adopt pertaining to the deliberations of the task force of the Great Lakes–St. Lawrence Commission will be harmonized with the program.

In addition, the measures will be in harmony with the *Politique québécoise de sécurité civile*, which seeks to mitigate the consequences of a catastrophe.

Other initiatives under way, in particular the strategic environmental assessments within the framework of the *Government Action Plan on Hydrocarbons* and the emergency measures committee will contribute to enhancing risk management in respect of maritime transport of hydrocarbons and other hazardous materials, pursuant to the implementation of the *Maritime Strategy*.

The Québec government will **provide leadership among municipal and industrial interveners and researchers** in order to broaden capabilities and expertise in Québec in the realms of prevention, preparation, intervention and restoration in respect of spill-related incidents and accidents.

The government will financially support research and knowledge acquisition initiatives to support expertise and various bodies in preparation and emergency response processes

when hydrocarbon spills occur in Québec's maritime territory, at the local, regional and provincial levels.

Bearing in mind the protection of ecosystems and the management of potential risk of maritime spills of hazardous materials on the St. Lawrence River, the government intends to establish a centre of expertise in the Îles-de-la-Madeleine specializing in prevention, preparation and environmental emergency response. The centre of expertise will make it possible to establish in Québec the best practices based on advanced research and the knowledge of river and marine ecosystems, in collaboration with the interveners concerned.

It will also pursue its efforts to enhance the process of alerting and mobilizing the interveners concerned by maritime accidents. Moreover, it will promote the Québec civil defence system in order to improve the state of preparedness of the municipalities, members of the *Organisation de sécurité civile du Québec* and the federal partners concerned by the management of major disasters. Special attention will also be paid to the restoration of communities in a sustainable development approach and to financial assistance programs that apply to spills or reliance on exceptional emergency measures.

Lastly, since the *Maritime Strategy* seeks to encourage greater numbers of cruise ships to navigate the St. Lawrence River and its tributaries, the Québec government will promote in an exemplary manner good practices to contend with a maritime incident involving a cruise ship.

2015-2020 ACTION PLAN

Enhance risk management related to shipping traffic

- › Organize a workshop of specialists on maritime transport safety that assembles the key provincial and federal government departments concerned with efforts to prepare and plan initiatives in Québec's maritime territory.
- › Support research and knowledge acquisition and the elaboration of tools to support expertise and municipal and governmental decision-making for the purpose of preparation and emergency response at the local, regional and provincial levels in respect of hydrocarbon spills in Québec's maritime territory. The government will provide \$3.4 million in financial support over the next five years.
- › Pursue efforts to implement integrated risk management related to potential maritime incidents in a spirit of respect for the approach and principles of Québec's civil protection system.
- › Establish in the Îles-de-la-Madeleine a centre of expertise specializing in prevention, preparation and environmental emergency response respecting spills of hazardous materials in marine environments on the St. Lawrence River.
- › Guide the municipalities in upgrading their emergency plans to reduce the impact of an incident involving a cruise ship by promoting the sharing of responsibilities among the interveners concerned.





PRIORITY 3

Contribute to the fight against climate change

Through the *Maritime Strategy*, the government will continue to support two programs adopted in the **2013-2020 Action Plan on Climate Change**, which is supporting the development of the maritime industry by replacing modes of transport that emit more GHG and by enhancing the efficiency of maritime transport.

Furthermore, the government will continue to **encourage reliance on and the transportation by navigable waterway of more sustainable energy sources**. The modernization of ships and handling equipment and amendments to federal

regulations governing the maximum sulphur content for the production, importing and sale of the marine fuel that ships on Québec's navigable waterways use represents a favourable context in this respect.

Within the framework of the **Plan Nord**, the government is seeking to have the territory served by LNG. Hence, the liquefied natural gas carrier will be the means of transportation favoured by promoters and future customers. The sea lane thus makes it possible to ship LNG and enable current users of diesel and fuel oil to reduce GHG emissions.

2015-2020 ACTION PLAN

Contribute to the fight against climate change

- › Support initiatives under the Programme visant la réduction ou l'évitement des émissions de gaz à effet de serre par le développement du transport intermodal (PREGTI) and the Programme d'aide gouvernementale à l'amélioration de l'efficacité du transport maritime aérien et ferroviaire (PETMAF).
- › Encourage the use of alternative energy sources in maritime transport, including LNG
- › Support the initiatives in the *2013-2020 Climate Change Action Plan* related to the protection of the coastal maritime territory and its ecosystems
- › Encourage projects calling for electrical energy, including proposed dockside connections in the ports of Montréal and Québec City

Photo: Gracieuseté de Mérimov



ENHANCE QUEBECERS' QUALITY OF LIFE

The economic development and environmental protection intervention priorities put forward in the *Maritime Strategy* converge to ensure individual and community betterment, one of Québec society's core values.

To attain this objective, the Québec government will ensure that economic spinoff from the Maritime Strategy helps to support and create jobs in all regions of Québec. In this way, the government will promote the occupancy and vitality of the regions in accordance with the objectives and principles of government strategy put forward for this purpose in 2011⁶². It will also adopt measures to ensure that the Maritime Strategy contributes to enhancing the quality of life of communities by creating a business climate conducive to investment to promote the economic leverage effect, synergy and the emergence of new businesses that create jobs.

With that aim in mind, the government has adopted five strategic priorities:

- **PRIORITY 1** Foster local economic spinoff
- **PRIORITY 2** Enhance the service offer of ferries and open up the communities concerned
- **PRIORITY 3** Target social acceptability and the involvement of communities
- **PRIORITY 4** Foster the attraction and the retention of young people
- **PRIORITY 5** Combat coastal erosion and support the communities concerned

⁶² Gouvernement du Québec. *Nos territoires y habiter et en vivre. Stratégie pour assurer l'occupation et la vitalité des territoires* – 2011-2016. Ministère des Affaires municipales, des Régions et de l'Occupation du territoire, Québec, 2011, p. 96, [www.mamrot.gouv.qc.ca/pub/occupation_territoire/strategie_occupation.pdf].

PRIORITY 1

Foster local economic spinoff

As explained in detail in Chapter 4, economic spinoff from the *Maritime Strategy* is significant. Indeed, it is anticipated that more than 30 000 new direct jobs will be created over 15 years, including 9 000 within five years. The government intends to promote local economic spinoff by relying on the leadership of entrepreneurs in the maritime sector and SMEs.

The *Maritime Strategy* is part of The Québec Economic Plan, which seeks, in particular, to **stimulate the economic growth of SMEs and the regions**. The comprehensive plan includes measures and structuring projects on which the *Maritime Strategy* can rely.

In particular, the plan proposes for SMEs throughout Québec:

- the establishment of a single outlet, Entreprises Québec, which will facilitate access to government programs and services;
- the pursuit of regulatory and administrative streamlining measures;
- the reduction of their tax burden;
- financing to support their investment projects and enhance their productivity.

In **Budget 2015-2016**, the government announced measures that will ultimately represent **an overall \$216-million annual reduction in the tax burden** of Québec firms. The support, aimed, as an example, at SMEs, will complement the *Maritime Strategy* and the economic spinoff that it generates in all of Québec's maritime regions.

What is more, in *Budget 2015-2016*, the government announced for the Gaspésie region and certain maritime regions Québec⁶³ the extension for five years of the refundable tax credit, until December 31, 2020. The tax credit supports jobs in businesses in the Gaspésie-Îles-de-la-Madeleine, Côte-Nord and Nord-du-Québec regions, especially in the seafood processing, mariculture and marine biotechnology products sectors. Moreover, the tax credit was enhanced to make eligible businesses in the tourist sector in the Îles-de-la-Madeleine.

⁶³ *Budget 2015-2016 du Québec – The Québec Economic Plan*, B. 171.

2015-2020 ACTION PLAN

Foster local economic spinoff

- › Extend the refundable tax credit for the Gaspé Peninsula and certain maritime regions of Québec.
- › Support small and medium-sized enterprises (SMEs) in the maritime sector, especially through a reduction of their tax burden.

Photo: Marc Tremblay



PRIORITY 2

Enhance the service offer of ferries and open up the communities concerned

The government will support measures that enable the Société des traversiers du Québec (STQ) to broaden its service offer both to open up isolated communities, maintain the continuity of the road network and offer adequate inter-regional and urban public transport ferry services.

Furthermore, the multifunctional services will contribute considerably to the development of the tourism potential of the regions served.

The government will also continue to play a role in **the economic and community development of Nunavik and James Bay**, in particular to build and maintain marine infrastructure. It intends to work in cooperation with the federal government and the local communities concerned to resolve problems related to the maintenance and rebuilding, if need be, of northern marine infrastructure.

2015-2020 ACTION PLAN

Broaden Québec's ferry service offer and open up communities

- › Elaborate, through the Société des traversiers du Québec (STQ), an action plan aimed at increasing its ridership by promoting economic and tourism development in all of the regions that it serves.
- › Define, through the STQ, criteria that will enable the government to evaluate existing services and the possibility of integrating new crossings into its network.
- › Work in cooperation with the federal government and the local communities concerned to resolve problems related to marine infrastructure in Nunavik, i.e. their maintenance and rehabilitation, where warranted.

Photo: Société des traversiers du Québec et carovukofoto (Caroline Vukovic)



PRIORITY 3

Target social acceptability and the involvement of communities

The quality of life hinges on stimulating, sustainable jobs, economic prosperity and a healthy environment. Chapters 4 and 5 of the *Maritime Strategy* examine these factors.

Furthermore, the active involvement of communities in the implementation of the *Maritime Strategy* and social acceptability are key factors in the success of this ambitious, innovative approach. To ensure its success, the government plans to **promote dialogue between representatives of the maritime industry**, the municipal sector and the public by relying, for example, on existing issue tables or forums such as the Tables de concertation régionales (TCR) or the Forum Saint-Laurent. The issue tables will enable each party to find satisfactory solutions, especially where projects are likely to affect residents' quality of life.

What is more, the *Maritime Strategy* will afford opportunities to revive certain territories by facilitating the development of the maritime heritage.

Local communities can take advantage of the presence of marine facilities such as wharves or marinas to engage in related outfitting that offers animated, attractive living environments. Such living environments are fertile ground for the establishment of businesses. Nothing precludes that certain businesses will ultimately adopt the perspective of pre-determined tourism products with high potential and that they will thus enhance the attractiveness of the destination among clienteles from outside Québec.

The government intends to pursue its role as a partner for economic and community development in the Nord-du-Québec region. Among other things, it intends to work in cooperation with the federal government and the local communities concerned to resolve problems related to marine infrastructure in Nunavik and their maintenance and rehabilitation, where warranted.

As for the substantial government investments devoted to construction projects and public and tourism infrastructure

improvement projects, the government will apply its *Politique d'intégration des arts à l'architecture* to as many projects as possible. In addition to contributing to the enhancement of the tourist attractions, the application of the policy will promote the production of works by Québec artists, which will enrich the quality of life of the communities concerned.

The government will also promote and more broadly disseminate its maritime and river heritage, in cooperation with the municipalities and the Aboriginal communities. Some 268 heritage elements are already included in the **Répertoire du patrimoine culturel du Québec**, under the "maritime and river heritage" theme. The consolidation of partnerships with the Aboriginal communities and nations will also highlight the development of the varied archeological heritage in the maritime territory, especially on the banks of the St. Lawrence River in the Côte-Nord region.

Accordingly, the *Maritime Strategy* can rely on province-wide institutions devoted to preserving collective memory and on the cultural milieu to promote Québec's maritime culture. In this perspective, the *Plan culturel numérique* du Québec, launched in 2014, calls for a **\$110-million** investment over seven years and will, among other things, enable all Quebecers to gain online access to works or other items related to their maritime culture and heritage.

Lastly, through the geographic configuration of the Îles-de-la-Madeleine, located some 215 km from the Gaspé Peninsula coast, and their location in the Gulf of St. Lawrence, the way of life of Magdalen Islanders, their economy and the manner in which they occupy and develop the territory are conditioned by insularity.

Under the *Maritime Strategy*, the government will examine how the region's unique nature can be properly considered in government action, the public services offered, and its official designation.



2015-2020 ACTION PLAN

Enhance the quality of life and promote the involvement of communities

- › Introduce measures focusing on information, consultation or collaboration in order to promote social acceptability and community involvement.
- › Promote dialogue between maritime industry representatives in order to help the maritime economy prosper, in particular to ensure that government initiatives match the industry's needs.
- › Examine how the Îles-de-la-Madeleine's unique character can be properly recognized in government action, public service offerings and its official designation.
- › Afford opportunities to revive certain territories by facilitating the development of the maritime heritage.
- › Apply the *Politique d'intégration des arts à l'architecture* to the greatest possible number of infrastructure projects carried out under the *Maritime Strategy*.
- › Promote the maritime culture and heritage, among other things through the *Plan culturel numérique* and the *Répertoire du patrimoine culturel du Québec*.
- › Prioritize, in the context of the administration of the capital investments assistance program of the Ministère de la Culture et des Communications, projects to maintain cultural facilities related to the maritime heritage or located in maritime towns.

PRIORITY 4

Foster the attraction and the retention of young people

By contributing to job creation in different sectors of the maritime economy, the *Maritime Strategy* will help to slow the exodus of young people to major urban centres and even encourage the opposite trend. To encourage young people's interest in the regions, the strategy will rely on concrete measures, including new ones that the

Secrétariat à la jeunesse will implement starting in 2016-2017. The initiatives will make it possible to guide and support young people wishing to settle in Québec's regions, in particular in the maritime territory. The initiatives include the significant tax credit devoted to the attraction and retention of young people in the regions.

2015-2020 ACTION PLAN

Promote the attraction and retention of young people in the regions

- › Support young people wishing to settle in Québec's regions.



PRIORITY 5

Combat coastal erosion and support the communities concerned

To enhance the security of infrastructure and buildings in more than 100 local communities and prevent significant social and economic repercussions on the health and safety of populations, the government will support local decision-makers and establish a coastal erosion emergency fund.

Such support seeks to guide the municipalities in the evaluation of vulnerabilities and risks related to coastal erosion against a backdrop of **climate change** and in the analysis of the implementation of adaptation and prevention measures, especially the recognition of land-use planning risks

Funds will be allocated to guide the municipalities for the purpose of:

- assessing risks and vulnerabilities for the territory and existing infrastructure and buildings;
- determining priority preventive measures according to risks linked to climate change, in particular in order to:
 - analyze and prioritize the necessary measures;
 - analyze the adaptation options available;
 - elaborate and implement coastal erosion prevention measures, especially as regards land-use planning.

The financial support rounds out existing measures, including those of the Ministère de la Sécurité publique. The measures will be funded under the *2013-2020 Action Plan on Climate change*⁶⁴, by the Green Fund (**\$8 million**) for 2015-2016⁶⁵.

What is more, in addition to helping to combat climate change, which is contributing to coastal erosion, the government will support research on coastal erosion, especially through measures in the *2013-2020 Climate Change Action Plan* or through research institutions such as Ouranos, the Chaire de recherche en ingénierie côtière et fluviale (INRS-ETE) or the Chaire de recherche en géoscience côtière (UQAR).

Lastly, the Québec government will pursue its efforts to counter the erosion of river banks, especially through its participation in the Comité de concertation Navigation⁶⁶ (2011-2026 St. Lawrence Action Plan). It will also ensure that the revision of the St. Lawrence River water-level regulation plans reflects its interests, in particular in order to monitor their impact on river bank erosion (see section 7.2).

⁶⁴ MDDELCC. [www.mddelcc.gouv.qc.ca/changementsclimatiques/pacc2020.htm].

⁶⁵ Budget 2015-2016 du Québec – The Québec Economic Plan, B. 241.

⁶⁶ St. Lawrence Action Plan [planstlaurent.qc.ca/fr/historique/a_notre_sujet/comites_de_concertation/navigation.html].

2015-2020 ACTION PLAN

Support the communities concerned by coastal erosion

- › Support the municipalities facing the erosion of the banks of the St. Lawrence River through an \$8-million assistance program for 2015-2016..
- › Ensure that the revision of the St. Lawrence River water-level regulation plans conforms to Québec's interests.



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IMPLEMENTATION FRAMEWORK

To govern Québec's maritime territory is to manage its complexity. Such management calls upon numerous interveners: federal, provincial and municipal authorities, economic players, environmental groups, the Aboriginal nations, and so on, not to mention the complexity of international agreements and the numerous legal and technical mechanisms related to the integrated management of the territory. The *Maritime Strategy* will thus be rolled out against a backdrop of interrelated private and public economic, regulatory, social and environmental challenges.

The government has, consequently, adopted an implementation framework respecting the *Maritime Strategy* that relies on:

- › 1 Flexible, adapted governance
- › 2 Sharing of responsibilities based on a spirit of respect for areas of jurisdiction and partnership
- › 3 A consultation process that calls upon all community interveners
- › 4 Appropriate promotion of the *Maritime Strategy*
- › 5 A suitable financial framework

7.1. Flexible, adapted governance

The government will first establish the **Secrétariat aux affaires maritimes**, which will serve as the governmental gateway for maritime affairs. The permanent secretariat will play a key role in the implementation of forums adapted to maritime challenges. It will mobilize interveners in the maritime sector and coordinate government action, in particular through the *Maritime Strategy*. It will work in close collaboration with the government departments and bodies concerned, several of which already have consultation mechanisms.

The Secrétariat aux affaires maritimes will have a mandate to coordinate the implementation of the *Maritime Strategy* and the **2015-2020 Action Plan**. It should be noted that measures other than those presented in this document can be added to the action plan.

The Secrétariat will also be responsible for preparing two other successive five-year plans, i.e. 2020-2025 and 2025-2030, and for overseeing their realization. The five-year plans set the objectives but also the commitments related to the financial frameworks. The Secrétariat must report on the plans, in particular by means of periodic follow-up and accountability. The body reflects the government's determination to enhance maritime resource management.

The Secrétariat aux affaires maritimes will have a mandate to coordinate interdepartmental steering committees focusing on challenges under the *Maritime Strategy*. Such coordination will seek to facilitate

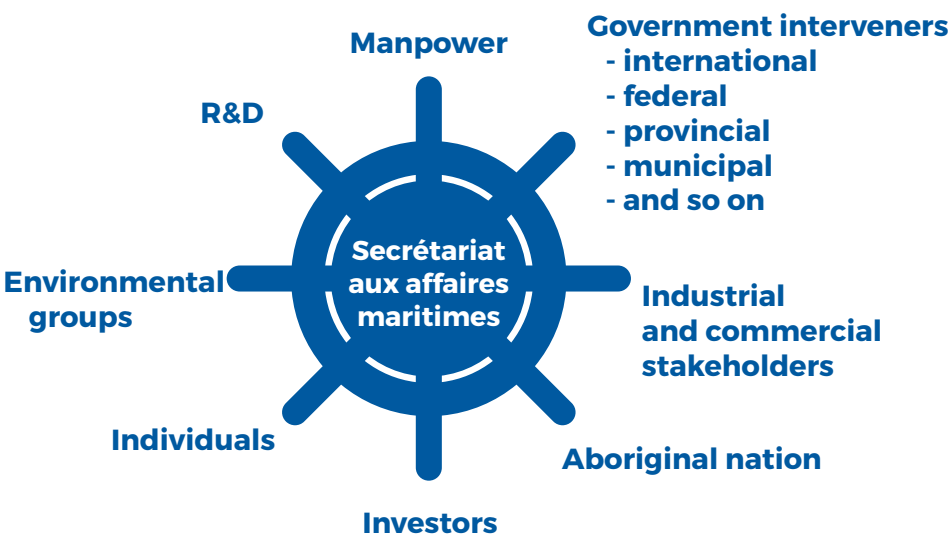
linkage between the government departments and bodies that are participating in the realization of the action plans under the *Maritime Strategy*.

The Secrétariat will also be responsible for recommending, based on departmental analyses, the priority projects to be implemented, for example with respect to regional development of the maritime sector, and for determining the projects to be set forth to the federal government, especially under the new *New Building Canada Plan*. The Secrétariat can rely on the interdepartmental committee to support it in fulfilling this mandate.

Indeed, an **interdepartmental committee** committee will be established comprising, among others, the Ministère des Affaires municipales et de l'Occupation du territoire (MAMOT), the Ministère de l'Économie, de l'Innovation et des Exportations (MEIE), the Ministère des Finances (MFQ) and the Ministère des Transports (MTQ). In particular, it will seek to ensure better government coordination related to certain initiatives to be carried out within the framework of the *Maritime Strategy*. It will have a \$1.5-million allocation in 2015-2016⁶⁷ to cover priority needs for short-term strategic information, which will enable the government to roll out the strategy.

⁶⁷ Budget 2015-2016 du Québec – The Québec Economic Plan, B. 180.

Figure 11 The Secrétariat aux affaires maritimes



7.2. Sharing of responsibilities based on a spirit of respect for areas of jurisdiction and partnership

The Québec government is playing a key role in all activities likely to take place in Québec's maritime territory and affect it. Indeed, it believes that it is in the best position to examine in a comprehensive manner questions pertaining to the maritime economy, maritime resource development, and the preservation and protection of its maritime territory.

What is more, considering the areas of jurisdiction that the federal government assumes, in particular as regards navigation and the fisheries, it is an ideal partner to implement the strategy.

Québec has, for several years, been participating in bilateral or multilateral consultations on maritime questions. Among other things, it is contributing to the implementation of the *Canada-Quebec Agreement on the St. Lawrence, 2011-2026*, from which the *St. Lawrence Action Plan* stems. The plan is contributing to reducing pollution, protecting human health, preserving, rehabilitating and developing habitats for flora and fauna, encouraging sustainable navigation practices, heightening awareness and mobilizing local and Aboriginal communities. What is more, these factors are directly related to the *Maritime Strategy*.

At the international level, Québec is an associate member of the **Council of Great Lakes Governors** and the **Great Lakes Commission**⁶⁸, two organizations that assemble the eight states bordering the Great Lakes and Ontario devoted to environmental and economic questions. This enables Québec to promote, in particular, scientific and technical collaboration to manage and preserve resources in the Great Lakes and St. Lawrence River ecosystem.

This collaboration has also led in concrete terms to international agreements aimed at preserving and protecting water in the Great Lakes—St. Lawrence River Basin. Indeed, Québec is a party to the *Great Lakes—St. Lawrence River Basin Sustainable Water Resources Agreement* signed in 2005, which applies in particular to American domestic law and prohibits major diversions outside the drainage basin.

Moreover, in collaboration with community interveners and through the federal government, the Québec government will continue to defend its interests and promote the *Maritime Strategy* before the **International Joint Commission** (IJC), a joint Canada-US advisory body. The IJC is responsible, among other things, for the implementation of plans to regulate flows and water levels between Lake Ontario and the St. Lawrence River. The water levels available for the St. Lawrence

River ecosystems and Québec's maritime and port operations are decisive questions under the *Maritime Strategy*, especially in a context of climate change. Water levels are also a major regional issue in the Great Lakes and St. Lawrence River Basin.

7.3. A consultation process that calls upon all community interveners

The management of Québec's maritime resources also involves numerous community interveners, including municipal and regional bodies, businesses, environmental groups, the Aboriginal communities and individuals and the associations that represent them. The government will continue to ensure that all of the interveners are properly informed and suitably consulted. What is more, the government will rely on cooperation to achieve the requisite social acceptability in respect of development in the maritime sector.

Indeed, consensus building is an ideal tool to better grasp the challenges that affect all of the stakeholders concerned. It also encourages the adherence and accountability of all community interveners from the standpoint of their practices and behaviour. It allows for the expression of consensual preferences and ensures the **social acceptability** of the management of Québec's maritime resources.

It should be noted that many bodies already rely on consultation processes, especially to manage fields that interact with coastal zones, in the form of expert panels, sectoral working groups, watershed bodies, or by means of public consultations and ad hoc committees.

What is more, metropolitan communities, regional county municipalities and Québec municipalities will play a key role in the rollout of the *Maritime Strategy* through their initiatives, regulatory powers and as "local governments"⁶⁹. In the same way, in the Nord-du-Québec region, the Kativik Regional Government, the Cree Nation Government and the Eeyou Istchee James Bay Regional Government will be called upon to play a role in the *Maritime Strategy's* implementation. The government intends to work in cooperation with municipal and regional bodies to ensure the implementation of the strategy and with the representatives of social and environmental groups.

It also intends to strengthen its ties with the **Aboriginal nations** concerned by relying on a relationship of trust and positive dialogue to promote their adherence to Québec's *Maritime Strategy*. It will propose solutions to enable all concerned parties to take advantage of the significant, genuine economic potential of the maritime sector. In particular, the strategy will be implemented in accordance with government policy respecting the consultation of the

⁶⁸ MRIF, [https://www.mrif.gouv.qc.ca/fr/Relations-du-Quebec/Ameriques/ Etats-Unis/Relations-bilaterales/Commission-Grands-Lacs].

⁶⁹ "Une nouvelle gouvernance régionale et un pacte fiscal transitoire" (November 5, 2014 press release), [https://www.premier-ministre.gouv.qc.ca/actualites/communiqués/details.asp?idCommunique=2573].

Aboriginal communities and in keeping with existing agreements, including those in the North.

In addition, it will foster in all maritime regions participation by the Aboriginal peoples with respect to training, employment and business opportunities. The Québec government, with its Canadian partner and industries, will collaborate, for example, with the Aboriginal nations concerned on questions of maritime transport and emergency measure planning in the event of spills of hazardous materials in marine and coastal environments.

In short, the *Maritime Strategy* implementation framework calls for **the involvement of Quebecers and community interveners** in decision-making processes, with an ongoing desire to maintain transparency. It is in this perspective that the government intends to act, in particular by amending legislation and regulations to enhance maritime resource management. It will foster better information sharing and understanding of each intervenor's responsibilities. Concrete action will also be introduced to establish or maintain issue tables such as the Forum de concertation sur le transport maritime that assemble intervenors in the maritime sector⁷⁰.

7.4. Appropriate promotion of the Maritime Strategy

The successful implementation of the *Maritime Strategy* hinges on collaborative, coordinated intergovernmental relations to promote and defend Québec's interests.

The Québec government, through the Ministère des Relations internationales et de la Francophonie (MRIF), will ensure the elaboration and the implementation of a concerted intervention plan under the international section of the *Maritime Strategy*. The intervention strategy, defined in collaboration with the government departments and bodies concerned, will guide the Québec government's initiatives abroad and international activities that take place in Québec.

Such **collaboration** will also stem from an extensive, sustained, original international promotional campaign devoted to the *Maritime Strategy*, centred on the unique comparative advantages of a project of this scope. The government intends to rely on the economic, legislative and diplomatic levers likely to highlight its presence and contribution in different spheres of the vast maritime sector.

Moreover, the government departments and bodies concerned will make every effort, in collaboration with the Secrétariat aux affaires intergouvernementales canadiennes, to enhance collaboration between the Québec government, the governments of the other provinces and territories and the federal government concerning maritime questions.

Such an approach will help to maximize development opportunities related to the strategy.

7.5. A suitable financial framework

The *Maritime Strategy* will extend over a 15-year period, from 2015 to 2030. It makes provision for three five-year plans. The first plan, which covers the period 2015-2020, will benefit from an array of concrete initiatives stipulated in *Budget 2015-2016*⁷¹. The plan represents \$1.5 billion in investments and will be subject to evaluation as it is rolled out in keeping with the government's fiscal framework and the objectives that the strategy pursues in the realm of job creation in all regions of Québec. **Table 2** indicates the cost of the initiatives.

⁷⁰ SODES, [www.st-laurent.org/dossiers-et-realizations/plan-strategique/forum-de-concertation-sur-le-transport-maritime].

⁷¹ *Budget 2015-2016 du Québec – The Québec Economic Plan*, B. 158.

TABLE 2: Québec government initiatives for the period 2015-2020 stipulated in Budget 2015-2016 according to the key objectives of the *Maritime Strategy* (millions of dollars)

SUSTAINABLY DEVELOP THE MARITIME ECONOMY	AMOUNTS OF THE INITIATIVES
Invest in commercial port infrastructure	
Port and intermodal infrastructure projects	200,0
Enhance road access to the Port of Montréal	75,0
Establish logistical hubs with the support of partners	
Projects to establish logistical hubs	300,0
Develop public infrastructure	100,0
Develop industrial port zones	
Support private investment projects in industrial port zones	300,0
Decontaminate certain industrial sites near port areas	100,0
Support Québec shipyards	
Develop Québec shipyards	50,0
Maintain existing tax incentives to encourage the modernization and renewal of the ship fleet through a Québec shipyard	82,9
Develop and modernize maritime tourism	
Invest in tourism projects along the St. Lawrence River	30,0
Develop certain natural attractions along the St. Lawrence River	21,6
Build tourism infrastructure	
Rebuild the maritime terminal and Alexandra Pier in Montréal	20,0
Reconfigure and expand the Ross Gaudreault cruise terminal in Québec City	35,0
Redevelop the Dalhousie site in Québec City	31,0
Modernize and ensure the long-term survival of the fishing and aquaculture industry	
Financially support commercial fishing and aquaculture industry	15,0
Train skilled labour and develop workers' areas of competence	
Support manpower skills development and training projects	15,0

SUSTAINABLY DEVELOP THE MARITIME ECONOMY		AMOUNTS OF THE INITIATIVES
Foster the development of knowledge in the maritime sector		
Develop the maritime research network		3,3
Support in-house innovation projects		9,1
Promote Québec's maritime industries at the international level		
Develop markets for Québec firms		5,0
PROTECT THE MARITIME TERRITORY AND ITS ECOSYSTEMS		
Improve risk management related to maritime transport		
Research and knowledge acquisition		3,4
Contribute to combating climate change		
Support initiatives aimed at enhancing the efficiency of maritime transport		35,0
ENHANCE QUEBECERS' QUALITY OF LIFE		
Foster local economic spinoff		
Extend the refundable tax credit for the Gaspé Peninsula and certain maritime regions of Québec		82,0
IMPLEMENTATION		
Government coordination of the Maritime Strategy		1,5
TOTAL		1 514,8

The *2015-2020 Action Plan* under the *Maritime Strategy* calls for the establishment of a new program administered by the Ministère des Transports du Québec to support port and intermodal infrastructure projects related to freight transportation. *Budget 2015-2016* has earmarked \$200 million for this purpose.

It also makes provision to invest in the establishment of logistical hubs with the support of partners, in particular real estate developers, institutional partners and regional bodies.

Indeed, *Budget 2015-2016* makes provision for a budget allowance of \$350 million over five years to promote the establishment of logistical hubs, with the support of partners. Accordingly, a total allocation of \$300 million over five years, including \$200million from the government and \$100 million from the Fonds de solidarité FTQ, is planned to participate in logistical hub projects. What is more, \$100 million has been reserved to satisfy public infrastructure needs related to logistical hub projects.

To financially support private investment projects in Québec's industrial port zones, the Budget makes provision for a \$300-million allocation over five years under the Economic Development Fund. Of this amount, \$50 million over five years will support the development of shipyards. Lastly, initiatives that may lead to up to \$100 million in investments over the next five years are planned in an approach aimed at decontaminating certain industrial sites near the zones.

A \$21.6-million investment is planned to support the development of certain maritime and natural tourist attractions as well as \$55-million investment specifically earmarked for two major cruise ship tourism reception infrastructure projects in Montréal and in Québec City.

Provision has also been made for tax assistance totaling \$82 million for development and industrial diversification in the Gaspésie-Îles-de-la-Madeleine region and other maritime regions in Québec. The assistance

will round out \$82.9 million in tax incentives announced earlier to support the maritime industries.

Substantial funds will be invested in knowledge acquisition. All told, \$15.8 million in direct subsidies will be granted for research and development, including \$9.1 million for applied research and innovation in the maritime sector.

To ensure the robust, sustainable development of the maritime industry overall, the government will support initiatives that seek to meet specific challenges. Accordingly, \$70 million in measures are planned over five years, including \$35 million to enhance the efficiency of maritime transport, \$15 million over three years to develop the commercial fishing and aquaculture industry, \$5 million over five years to develop exports, and \$15 million over five years to develop workers' skills.

A \$1.5-million allocation will also be reserved in 2015-2016 for the interdepartmental committee to cover priority needs for short-term strategic information, which will enable the government to roll out the *Maritime Strategy*.

As for the \$75 million earmarked for the improvement of road access to the Port of Montréal and \$61 million for the new program to develop maritime tourism and redevelop the Dalhousie site in Québec City, these initiatives are already under way and were announced in *Budget 2014-2015*.

Photo: TQ/Marc Loisel





Photo: iStock, gracieuseré du MEIE

CONCLUSION

Québec's first *Maritime Strategy* recognizes the indis-sociable nature of the economic, social and environmental dimensions of sustainable development. The *Maritime Strategy* includes an ambitious, visionary plan that will harness Québec's enormous maritime potential and promote its growth and long-term survival in the coming years.

From an economic standpoint, this growth-oriented project relies on Québec's competitive advantages and, in particular, its strategic geographic position. The proposed plan includes, in particular, concrete action to create logistical hubs, establish industrial port zones, support Québec shipyards, develop the maritime tourism industry, ensure the long-term survival of the fishing and aquaculture industry, not to mention support for innovation, research and skills development.

From an environmental perspective, the *Maritime Strategy* makes the protection of the St. Lawrence River's ecosystems and biodiversity a strategic priority. In particular, it includes measures aimed at establishing marine protected areas, reducing greenhouse gases and managing risks related to maritime transport. Québec will once again affirm its leadership in the realm of sustainable development.

From a social standpoint, the *Maritime Strategy* seeks to ensure that the maritime territory is a source of well-being for riverside and coastal communities. Bank protection, social acceptability, opening up communities, insularity and the creation of stimulating jobs in the regions are the focal point of the action plan adopted. Quebecers are demanding nothing less than responsible maritime development.

The *Maritime Strategy* is a practical, pragmatic tool whose initial action plan is supported by a financial framework of more than \$1.5 billion, which will generate over the next 15 years more than 30 000 direct jobs throughout Québec and total investments of more than \$9 billion.

The *Maritime Strategy* by the year 2030 is a linchpin of *The Québec Economic Plan*. It will contribute tremendously to Québec's prosperity in a spirit of respect for populations and the environment. Partners in the maritime sector are invited to take advantage of the numerous opportunities that will be offered to them. All Quebecers are also invited to take advantage of the full potential of the assets of Québec's maritime territory to ensure their betterment and that of future generations.



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APPENDICES

The unabridged version of the *Maritime Strategy* comprises six appendices that are an integral part of the document.

› APPENDIX 1	Acronyms and initialisms
› APPENDIX 2	Glossary
› APPENDIX 3	Tables and charts
› APPENDIX 4	Partners that submitted a brief
› APPENDIX 5	Government departments that participated in the elaboration of the <i>Maritime Strategy</i>
› APPENDIX 6	Québec's maritime territory

APPENDIX 1

Acronyms and initialisms

AAPA	American Association of Port Authorities
BAPE	Bureau d'audiences publiques sur l'environnement
BRIICS	Brazil, Russia, India, Indonesia, China and South Africa
CCAP	2013-2020 Action Plan on Climate Change
CETA	Comprehensive Economic and Trade Agreement
CHA	Cultural Heritage Act
CN	Canadian National Railway Company
CP	Canadian Pacific
CRBM	Centre de recherche sur les biotechnologies marines
CSMOIM	Comité sectoriel de main-d'œuvre de l'industrie maritime
CSMOPM	Comité sectoriel de main-d'œuvre des pêches maritimes
DEP	Secondary school vocational diploma
EDF	Economic Development Fund
ÉPAQ	École des pêches et de l'aquaculture du Québec
EU	European Union
GHG	Greenhouse gases
ICT	Information and communications technologies
IJC	International Joint Commission
IMQ	Institut maritime du Québec
INRS-ETE	Institut national de la recherche scientifique – Eau Terre Environnement
ISMER	Institut des sciences de la mer de Rimouski
LNG	Liquefied natural gas
MAMOT	Ministère des Affaires municipales et de l'Occupation du territoire
MAPAQ	Ministère de l'Agriculture, des Pêcheries et de l'Alimentation du Québec
MCC	Ministère de la Culture et des Communications
MEIE	Ministère de l'Économie, de l'Innovation et des Exportations
MERN	Ministère de l'Énergie et des Ressources naturelles
MFQ	Ministère des Finances du Québec
MRIF	Ministère des Relations internationales et de la Francophonie
MS	Maritime Strategy
MTQ	Ministère des Transports du Québec
NAFTA	North American Free Trade Agreement
OECD	Organisation for Economic Co-operation and Development
PETMAF	Programme d'aide à l'amélioration de l'efficacité du transport maritime, aérien et ferroviaire en matière de réduction des émissions de GES
PGCQ	Plan géomatique du gouvernement du Québec
PREGTI	Programme visant la réduction ou l'évitement des émissions de GES par le développement du transport intermodal
R&D	Research and development
RCM	Regional country municipality
RQM	Réseau Québec Maritime
SAM	Secrétariat aux affaires maritimes
SEA	Strategic environmental impact assessment
SÉPAQ	Société des établissements de plein air du Québec
SME	Small and medium-size enterprise
SODES	St. Lawrence economic development council
SSS	Short sea shipping
STQ	Société des traversiers du Québec
UN	United Nations
UQAR	Université du Québec à Rimouski

APPENDIX 2

Glossary

Bank

see “Coast”.

Coast

The following definition is given by way of indication: coast is a very specific term that applies solely to the portion of an island or a continent that runs along an ocean or marine waters. A distinction can be made between coasts that directly face the ocean and more sheltered ones near a gulf or bay. Moreover, a shore can refer to a portion of the land that links it to a vast water body, including oceans and lakes. In the same way, the related term “bank” refers to a site where gently or steeply sloping earth meets a river or a watering point smaller than a lake⁷².

Halieutic

Of or pertaining to fishing.

Innovation chain

The innovation chain is a process that encompasses a series of steps or links that facilitate the transition from an idea or an invention to research and its application or marketing.

Logistical hub

A logistical hub is a multimodal or intermodal industrial zone planned to ensure the efficient, safe handling of a large flow of goods in order to rapidly serve major North American and international markets. The idea is to group together businesses on a given site to create synergistic impacts and or agglomeration effects. Some examples are distribution centres, warehouses, and value-added services such as labelling, refrigeration, transshipment, container maintenance, manufacturing and customs clearance.

Logistics

Logistics is the management of the flow of goods between the point of origin and the point of consumption in order to meet requirements of customers or corporations. It seeks to coordinate supply, production and distribution activities. Transportation is an essential component but it also includes planning and the processing of requests, supply, production planning, relations with suppliers and customers, warehousing, handling, assembly, product packaging, and support functions related to these operations⁷³.

Logistics chain

The logistics chain is a system of organizations, individuals, activities, information and resources that contribute to the successive supply functions of raw materials, the processing of such materials into components, then into finished products and the distribution to customers of such products. This also applies to services.

Marine

Marine refers to the sea (saltwater) or to the array of activities that take place on the sea.

Maritime

Maritime broadly covers everything related to marine, river and shoreline resources.

Maritime economy

Québec’s maritime economy encompasses all of the economic sectors that rely on the use or exploitation of the resources of its maritime territory, including conventional ones such as maritime transport, port operations, shipbuilding, tourism and fishing. Other emerging sectors include the development of marine biotechnology, aquaculture, the protection of ecosystems, the control and monitoring of maritime activities, support services, education and research in the maritime sector.

Shore

see “Coast”.

Shoreline

The term is defined as the strip of earth that makes up the zone included between a marine or river area and dry land. By extension, it includes or can indicate shores or coasts.

St. Lawrence

The term “St. Lawrence” refers to the river and the Estuary and Gulf of St. Lawrence.

Vascular flora

“Vascular” plants include all ferns and seed plants and flowering plants.

⁷² Wikipédia, l’encyclopédie libre. [Coast (geography)]. (March 29, 2015), [fr.wikipedia.org/w/index.php?title=C%C3%B4te_(g%C3%A9ographie)&oldid=113362290] (consulted on April 12, 2015).

⁷³ Conseil de la science et de la technologie. *L’innovation dans la chaîne logistique des marchandises*, 2010, p. vi. [www.cldvs.com/wp-content/uploads/2010_avis_logistique_juin.pdf].

APPENDIX 3

Tables and charts

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APPENDIX 4

Partners that submitted a brief

Below are the partners that participated in the consultation that the Minister for Transport and the Implementation of the Maritime Strategy launched in the context of the elaboration of the *Maritime Strategy*.

The consultation took place from June 20 to September 15, 2014

- Abenaki Band Council of Wôlinak
- Aluminium Association of Canada
- Association des aquaculteurs du Québec
- Board of Trade of Metropolitan Montreal
- Canadian Marine Pilots' Association
- CargoM
- Cégep de Baie-Comeau
- Cégep de la Gaspésie et des Îles
- Cégep de Matane
- Cégep de Rimouski
- Cégep de Sept-Îles
- CN
- Coalition Avenir Québec
- Comité sectoriel de la main-d'œuvre des pêches maritimes
- Commission régionale du port de Gros-Cacouna
- Communauté métropolitaine de Montréal
- Communauté métropolitaine de Québec
- Concept Naval
- Conseil des Montagnais du Lac-Saint-Jean
- Corporation de gestion du port de Baie-Comeau
- Corporation des pilotes du Bas-Saint-Laurent
- CPCS
- Cruise the Saint Lawrence Association
- CSL Group
- CTMA
- Davie
- École des pêches et de l'aquaculture du Québec
- Essipit Montagnais Band Council
- Fédération des chambres de commerce du Québec
- Fédération des pêcheurs semi-hauturiers du Québec
- Fednav
- Fonds de solidarité FTQ
- GazMétro – Transport Solutions
- Great Lakes and St. Lawrence Cities Initiative
- Groupe Desgagnés
- Groupe Le Massif
- Human Resources Sectorial Committee of the Maritime Industry
- Huron-Wendat Nation Council
- Innovation et développement Manicouagan
- Innovation maritime
- Institut maritime du Québec
- Institut national de la recherche scientifique
- Kahnawake Mohawk Council
- Kativik Regional Government
- Magdalen's Islands Seal Hunters Association
- Marine Biotechnology Research Centre
- Mi'gmawei Mawiomi Secretariat
- Montreal GatewayTerminals Partnership
- Montreal Port Authority
- Municipalité des Îles-de-la-Madeleine
- Navamar
- Ocean
- Parti québécois
- Port de Port-Cartier (côté municipal)

- Polytechnique Montréal
- Quebec Business Conseil of the Environment
- Québec Fisheries and Aquaculture Innovation Centre (Merinov)
- Quebec Fish Processors Association
- Québec Mining Association
- Québec-Océan
- Québec Port Authority
- Quebec Tourism Industry Association
- QSL
- Railway Association of Canada
- Reformar
- Saguenay Port Authority
- Sept-Îles Port Authority
- Shipping Federation of Canada
- Société de promotion économique de Rimouski
- Société des attractions touristiques du Québec
- Société du parc industriel et portuaire de Bécancour (port du Québec)
- Société du port de Valleyfield (port municipal)
- St. Lawrence Economic Development Council (SODES)
- St. Lawrence Seaway Management Corporation
- St. Lawrence Shipoperators
- Stratégies Saint-Laurent
- Table maricole du Québec
- TCR des Îles-de-la-Madeleine
- TCR du Haut Saint-Laurent et du Grand Montréal
- Technopole maritime du Québec
- Union des municipalités du Québec
- Université de Sherbrooke
- Université du Québec à Chicoutimi
- Université du Québec à Montréal
- Université du Québec à Rimouski
- Université du Québec à Trois-Rivières
- Université Laval
- McGill University
- Ville de Gaspé
- Ville de Sept-Îles
- Ville de Sorel-Tracy
- Villes et Régions Innovantes (VRIC)

Other partners also sustained reflection within the framework of the elaboration of the *Maritime Strategy*. Discussions with the partners enhanced the ongoing deliberations at public meetings or events.

APPENDIX 5

Government departments that participated in the elaboration of the *Maritime Strategy*

Ministère de l'Agriculture, des Pêcheries et de l'Alimentation du Québec

Ministère de la Culture et des Communications

Ministère de la Sécurité publique

Ministère de l'Économie, de l'Innovation et des Exportations

Ministère de l'Éducation, de l'Enseignement supérieur et de la Recherche

Ministère de l'Énergie et des Ressources naturelles

Ministère des Affaires municipales et de l'Occupation du territoire

Ministère des Finances du Québec

Ministère des Forêts, de la Faune et des Parcs

Ministère des Relations internationales et de la Francophonie

Ministère des Transports du Québec

Ministère du Développement durable, de l'Environnement et de la Lutte contre les changements climatiques

Ministère du Tourisme

Ministère du Travail, de l'Emploi et de la Solidarité sociale

Secrétariat à la communication gouvernementale

Secrétariat au Plan Nord

Secrétariat aux affaires autochtones

Secrétariat aux affaires intergouvernementales canadiennes

Secrétariat aux priorités et aux projets stratégiques

Secrétariat du Conseil du trésor

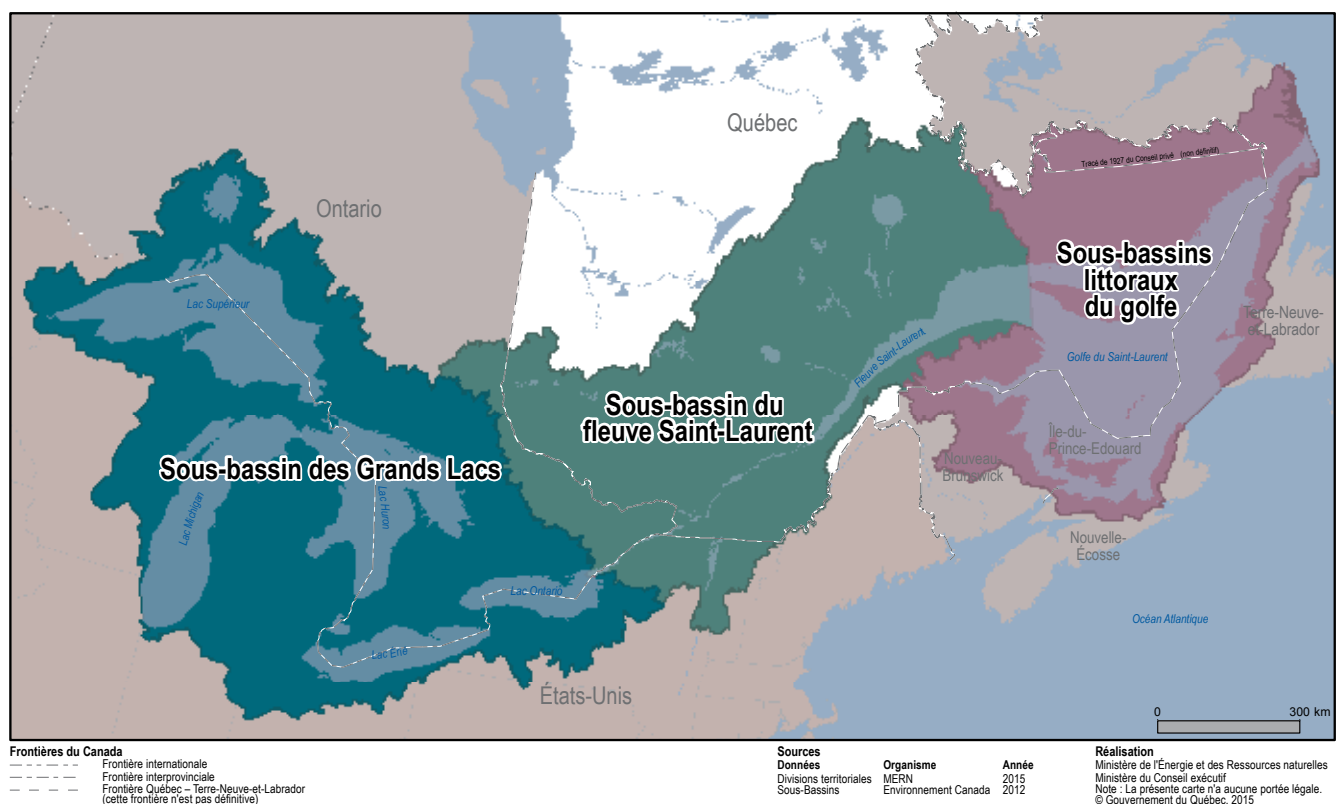
APPENDIX 6

QUÉBEC'S MARITIME TERRITORY

The St. Lawrence lies within the St. Lawrence River drainage basin, part of a bigger entity called the Great Lakes and St. Lawrence River Basin⁷⁴ (figure 12). After from 7 of the 13 regions encompassing all of Québec's 430 major drainage basins, i.e. more than one-third of Québec's territory overall, flow into the St. Lawrence River alone⁷⁵.

From its western end, located in Québec, the St. Lawrence River can be divided into five segments, i.e. the freshwater reach⁷⁶, the riverine, upper and lower estuaries, and the gulf (figure 13). The freshwater reach comprises three lakes, Lac Saint-François, Lac Saint-Louis and Lac Saint-Pierre (figure 14).

Figure 12 Great Lakes and St. Lawrence River drainage basin



⁷⁴ MDDELCC. [www.mddelcc.gouv.qc.ca/Eau/grandslacs/2005/index.htm].

⁷⁵ MDDELCC. [www.mddelcc.gouv.qc.ca/eau/flrivlac/fleuve.htm].

⁷⁶ The freshwater reach begins near Cornwall, Ontario.

Figure 13 Key hydrographic sections of the St. Lawrence River

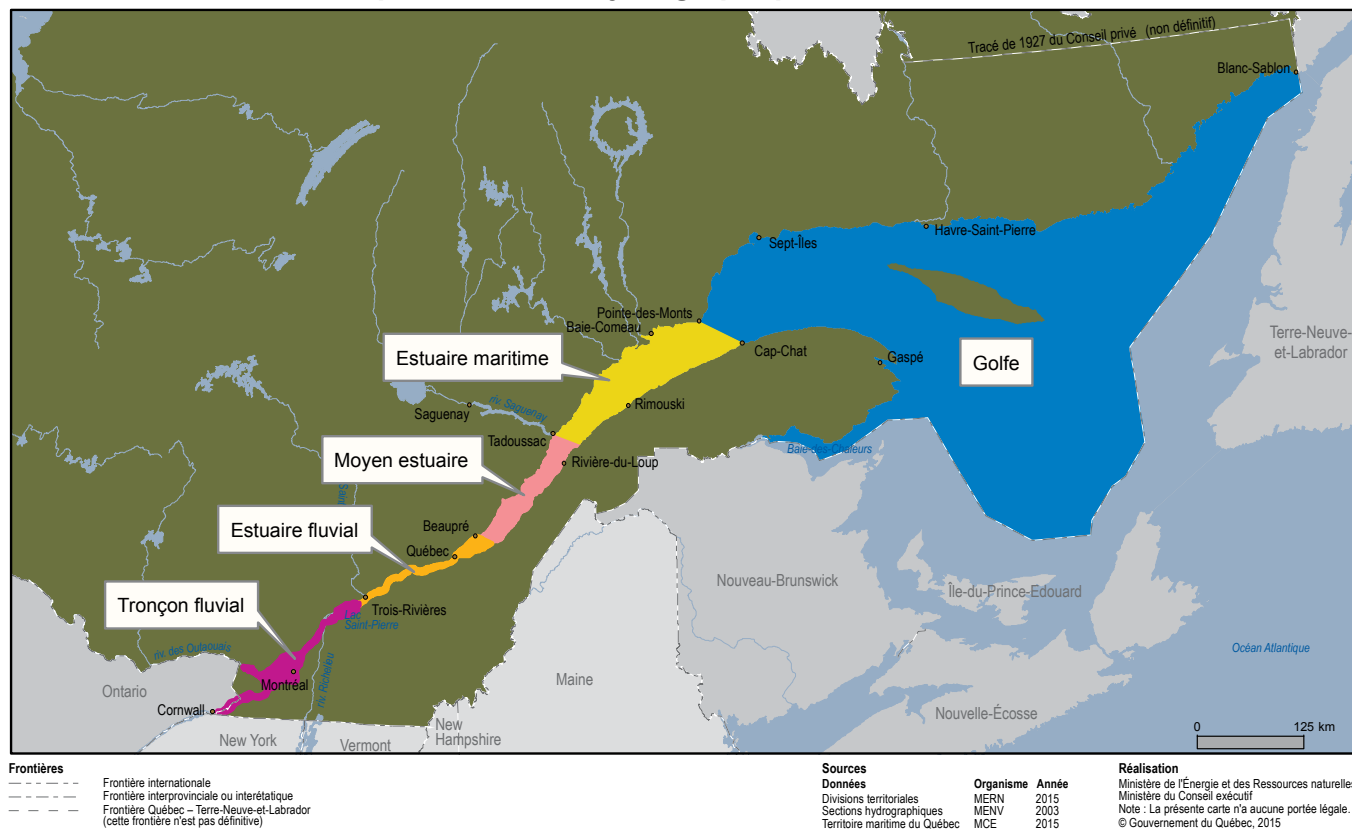


Figure 14 RIVERINE LAKES OF THE ST. LAWRENCE RIVER



