THE POTENTIAL IMPACT OF THE ASEAN INTEGRATION ON PHILIPPINE MARITIME MANPOWER

An Executive Summary

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1. INTRODUCTION

- The ASEAN, composed of 10 member states (Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand, and Viet Nam), will be transformed into a region with free movement of goods, services, investment, skilled labour, and freer flow of capital (ASEAN, 2008) at the end of 2015.

- Maritime transport is one of the infrastructures that have a crucial role in the process towards a more economically and socio-culturally integrated ASEAN region (ASEAN, 2010, p.11). More so that most ASEAN nations are maritime economies which heavily rely on sea transport for the carriage of goods and people.

- It is at this crucial point that the role of seafarers come in. Ships will not sail without the seafarers safely and securely operating them. Given the dominance in numbers of Filipino seafarers where there is not a ship without a Filipino seafarer on board, they surely will be among those affected by the integration. Presently, it cannot be surmised what particular implications the integration will have on the employment of seafarers because of the lack of literatures to back it.

- This research, therefore, was undertaken by the NMP for the purpose of assessing the possible impact of the ASEAN integration (AI) to shipping and the employment of Filipino seafarers and recommend priority actions for consideration of the stakeholders in maritime manpower employment and development.

- Conducted and completed in 2015, the study is basically a desktop research which involved document review of researches, papers and other literatures, and the transcripts of the proceedings of the Stakeholder's Forum conducted specifically for the study last August 19, 2015 at The Bay Leaf Intramuros, Manila. The forum was attended by five (5) paper presenters and 41 participants representing concerned government agencies, domestic shipping associations, employers', seafarers' and maritime education and training providers' associations and the media.

2. HIGHLIGHTS OF THE STUDY

2.1 Opportunities in Shipping

The study identified the following conditions in shipping that would be favorable to the employment of Filipino seafarers :

- **Rapid rise in trade volumes** is one of the key developments in ASEAN trade that will affect the future of intra-ASEAN shipping (PDP Australia Pty Ltd/Meyrick and Associates, 2005). The same source attributed this as a result of the trade liberalization measures which will bring volume of goods traded internationally to increase far more rapidly than national income. Moreover, reports (PDP Australia

Pty Ltd/Meyrick and Associates, 2005 and ASEAN Secretariat, 2014) have indicated an increasing trend in intra- and extra-ASEAN trade and the prospects for its continued growth appear to be strong and should be sustainable if supported by closer economic integration, to wit:

- Trade in goods from 8 priority sectors (agro-based products, fisheries products, health care products, rubber-based products, wood-based products, textiles and garments, electronics and ICT, automotive) is expected to contribute to increased trade as a result of accelerating liberalization in these priority areas. These goods accounted for more than 50% of intra-ASEAN trade which when translated into value terms accounts to US$ 48.4 billion and US$ 43.4 billion of intra-ASEAN exports and imports, respectively (Gallacher, 2004 in PDP Australia Pty Ltd/Meyrick and Associates, 2005, p. 15). Unfortunately, volume data from these trade flows which is more directly relevant from the perspective of shipping requirements is not available.
- An ASEAN Secretariat report cited that intra-ASEAN trade has increased at a faster pace during the period 1993-2013. It noted an average annual growth rate of 10.5%, as compared to either overall ASEAN trade (9.2%) or extra-ASEAN trade (8.9%). The Philippines' share of intra-ASEAN merchandise trade is at 5.37%. Its major trading partners are Singapore, Thailand, Malaysia and Indonesia (PDP Australia Pty Ltd/Meyrick and Associates, 2005).
- Furthermore, intra-ASEAN trade forecast show that trade will grow by at least 27.5% over the next two to three years (PDP Australia Pty Ltd/Meyrick and Associates, 2005)
- On external trade (trade with the world), analysis show that the annual growth from 1993 to 2013 is at an average of 6.1%.

- **Changes in the geography of trade**. This is another key development in ASEAN trade that will affect the future of intra-ASEAN shipping (PDP Australia Pty Ltd/Meyrick and Associates, 2005) which could be attributed to diversification of sources of supply. This trend reflects the growing importance of intraregional trade and to some extent moving the production close to markets or near sourcing (Crowe, 2012 in UNCTAD, 2013) as evidenced by the increasing share of China in the ASEAN trade which accounted for 2.1% from 1993 to 2001. In addition, the operationalization of short sea shipping networks will open trade links among the ASEAN member states. Four (4) out of 11 identified routes are priority as follows: 1)

Davao-General Santos-Bitung (Indonesia); 2) Belawan (Indonesia)-Penang (Malaysia)-Phuket (Thailand) Route; 3) Melaka (Malaysia)-Dumai (Indonesia); 4) Penang (Malaysia)-Langkawi (Malaysia)-Phuket (Thailand) Route.

- **Increased demand for shipping services.** The increased demand for shipping services results from the four modes in the trade in shipping and related services (Tongzon & Lee, 2015 in Serafica, 2015). Mode 1 is cross border supply wherein service is delivered within the territory of the Member, from the territory of another Member. An example would be an Indonesian ship transporting cargoes on behalf of an Indonesian exporter to a Malaysian importer in Malaysia. Mode 2 is consumption abroad wherein service delivered outside the territory of the Member, in the territory of another Member, to a service consumer of the Member. An example for this is a Singaporean registered shipping company may use an Indonesian stevedoring company to handle its cargoes at Indonesian ports. While Mode 3 is commercial presence wherein service delivered within the territory of the Member, through the commercial presence of the supplier. A Singaporean shipping company establishes a branch in other countries. Lastly, Mode 4 is the presence of natural person wherein service delivered within the territory of the Member, with supplier present as a natural person. A Filipino seafarer working on a Singaporean ship.

  As a result of the increased demand for shipping, the more developed ASEAN member states would be in need of more seafarers aboard their vessels and more workers to man their shipping-related overseas offices. The Philippines and Myanmar will benefit in terms of employment for their seafarers as well have substantial indirect employment effects on other shipping-related industries (Tongzon and Lee, 2015).

- **Manning situation in ASEAN member states.** The positive spill-over effect in the increased demand for maritime transport is the increased demand for seafarers (Serafica, 2015). Given this, the study examined the supply of seafarers from ASEAN member states. Evidently, the Philippines has the most number of seafarers both officers and ratings. Based on the country report of each member states, most seafaring ASEAN nations are experiencing shortage of seafarers for their own domestic fleet. While the ASEAN region has a large working population ranging from 63 to 73 million, but there is no clear indication of more people entering the seafaring profession because fewer nationals are enticed to work at sea due to attractiveness of available landbased jobs resulting from continuing economic progress of ASEAN nations.

This is therefore an opportunity for the Philippines which, next to the United States, has the highest comparative advantage in services (Serafica, 2015). A country that has placed a global position in the supply of maritime manpower, a lot of potential are on the offing. The Philippines can further provide full range of services by developing the maritime cluster (such as shipping management services, education and training, surveys and audits) and the Philippine national flag registry (Magsaysay-Ho (2014) in Serafica, 2015). Skills required for these shipping related services are those acquired, honed and perfected while the maritime professionals were working on board ships (Borromeo, 2015). These shipping related services can be an alternative employment for seafarers in case of employment movement from ship to shore which will also ensure that relevant skills and experience are not lost to the maritime industry.

On the other hand, establishing the Philippine flag registry is an advantage of the country over other Flag States considering that important elements such as shipowning, crewing, operations and technical staff are already located within the country (Lee, 2014). Developing/Establishing a Philippine flag registry will open employment options to the country's seafarers in the field of ship inspection, ship surveying and technicians, among others. Currently, House Bill 3647 *(An Act Establishing the Scope and Procedure for Philippine Ship Registry, Recognition and Enforcement of Maritime Claims, and Limitation of Liability, as Well as Providing Essential Incentives which Collectively will Promote a Comprehensive and Orderly Philippine Ship Registry System for the Regulation of Vessels Carrying the Flag State)* is pending at the House Committee on Transportation, which establishes the legal framework for a Philippine Ship Registry to attract foreign ship owners to register their ships in the Philippines (Palomar, 2014). A maritime industry stakeholder positively expressed for the passage of the bill since it would mean more ships registered in the Philippines and more berths for cadets and employment for Filipino seafarers (Proceedings, Stakeholder's Forum, 2016).

2.2 Challenges in Shipping

Challenges are conditions in shipping which may form as a tumbling block in the realization of an ASEAN integration and consequently impact on employment of seafarers. Challenges identified by the study were drawn from the Proceedings of the Stakeholder's Forum 2015 and related studies and papers.

- **Differences in national shipping capacity**. Most of the ASEAN member states are highly dependent on foreign shipping but then only few member states are highly competitive. The largest shipowning country in ASEAN is Singapore, followed by Malaysia and Indonesia (UNCTAD, 2014). In contrast, Philippine registered shipping fleet has continuously declined at a rate of 9% annually from 2001 to 2007 due to the country's unattractive tax incentives and lack of financing schemes (Senate S. 2524).

- **Restrictive national shipping policies and regulations** such as the cabotage laws of each country (ADBI, 2014) will also substantially affect the free trade being advocated in the ASEAN integration. Cabotage law restricts the operation of foreign vessels on domestic routes. Foreign flagged ships are allowed only when the national tonnage is not available and upon issuance of necessary permit. Cabotage laws remain in place in all ASEAN member states with archipelagic configuration, such as Indonesia, Philippines, Malaysia, Thailand, Vietnam and Myanmar (PDP Australia Pty/Meyrick and Associates, 2005).

  Likewise, restrictions in the form of market access and foreign investment related are still very common in the trade of shipping and shipping-related services such as foreign equity requirement when establishing a branch office in another ASEAN country and the restrictions in the hiring of crew complement as embodied in their cabotage laws.

- **Differences in quality of port and shipping-related infrastructure**
  Considering the different economic levels of each of the ASEAN member states, it follows that differences also exist in the quality of port and shipping-related infrastructures. Insufficient berth depth to accommodate larger vessels, poor port access, low productivity in cargo handling operation due to lack of cargo handling equipment, congestions in ports, and inadequate port infrastructures are major considerations affecting shipping in the ASEAN region.

2.3 Potential Impact of the ASEAN Integration on the Employment of Filipino Seafarers

The potential impact on seafarers' employment is analyzed in three scenarios : outward mobility, inward mobility and development of maritime cluster.

Outward Mobility

- One perspective of the ASEAN integration is that the **Philippines will continue to supply maritime labor**, **this time targeted to the ASEAN fleet** (Borromeo, 2015). The increasing trade volumes that come with an integrated economy among ASEAN member states, the changing geography of trade, and the maritime manpower situation in the ASEAN member states, are opportunities indicating the Philippines will continue to supply maritime labor. The issue on the shortage of seafarers, while it is global, is likewise experienced by ASEAN member states and much to the advantage of the Philippines having the most number of seafarers. As reported earlier, ASEAN member states could not even meet the manning requirements for their own ships. While they have some national regulations reserving certain percentage of manning to their own nationals but in most cases, these are not followed rigorously. In addition, other ASEAN member states have regulations which sets out who are allowed to work on their ships. Taking all these in consideration, it works well to the advantage of the Philippines because it has the number of seafarers, its certificates are recognized in Singapore and Malaysia and other ASEAN countries that are parties to the STCW '78 as amended.
- The changing geography of trade with the trend of near supply becoming more prominent and the opening of additional shipping routes in the ASEAN region are important trends in shipping which makes sailing within the ASEAN region an **attractive employment options** for Filipino seafarers. Proximity to the Philippines, and wages are "pull factors" that **Filipino seafarers, sailing overseas and those in domestic shipping, may opt sailing within ASEAN region**.
- Another brighter side of the integration, is the **opportunity for the country's qualified ratings to board a ship** (Aguilar, 2015). For the Philippines with a surplus of ratings, AI is a welcome opportunity for them. For the new entrants, it will open employment opportunity for them. For those sailing as ratings but are potential officers, they may be given a chance to serve as officers on board.

- Given the above scenarios, the outward movement of Filipino seafarers, in effect, will **increase the deployment figure** of the country as seafarers in domestic ships, ratings and potential officers get employment within ASEAN region. **Increase in the dollar remittances of seafarers** is also expected to increase as a consequence of increased deployment. As potential officers will be given a chance to act as officers on board, **the country's share of officers in the world fleet will likely increase** as a consequence of employed officers in ASEAN region. Likewise, s**eafarers may stay longer at sea sailing within the ASEAN region** which is nearer to the Philippines.
- On the other hand, the bright employment opportunities offered in the ASEAN region will **exacerbate shortage of seafarers in domestic shipping** (Aguilar, 2015). Currently, domestic fleet operators could not compete with the wage structure/wages given by foreign shipowners and this situation will continue to encourage labour migration. However, "being near home" will be a strong hold-on factor of domestic shipping operators to their crew. They should, therefore, leverage on this by improving the living and working conditions on board.

<u>Inward Mobility</u>

- Seafarers in domestic ships will be most affected in terms of inward mobility. Implications of inward mobility is taken in two context : 1) free flow of skilled labor, and 2) liberalization of the cabotage law (RA 10668).
- In the context of free flow of skilled labor, **Filipino seafarers will retain their employment in domestic shipping** even with the AI happening for the reason that Philippine laws do not permit entry of foreign nationals into the labor market for employment purposes. According to Alcantara (2015), Asean integration is still rule-based. For one, there is RA 8544 (Act regulating the merchant marine profession) which stipulates that only citizens of the Philippines are allowed to practice their merchant marine professions in the Philippines. Other labor and immigration laws also restrict their employment in the Philippines.
- As a result of the relaxation/liberalization of cabotage law with the passage of Republic Act 10668 (An act allowing foreign vessels to transport & co-load foreign cargoes for domestic transshipment & for other purposes), fewer movement of goods by domestic ships is expected since foreign ships are now allowed to transport import and export cargoes from one port to another within the Philippines. In effect, this situation may weaken the domestic shipping industry and its allied services and consequently result to **unemployment or displacement of seafarers in domestic**

ships. This phenomenon has already been recognized in a study by Llanto and Navarro (2012) which will ultimately result to unemployment arising from the closure or weakening of domestic shipping and allied services.

- However, the same authors argued that "fears of foreign players dominating the local shipping industry maybe unfounded because of market limitations such as market size, lack of familiarity with domestic markets, and institutional barriers may not allow foreign shipping companies to do business in all sectors of coastwise trade. The market adjustments by foreign competitors will also give domestic shipping lines ample time to modernize their fleet and operations in order to be more competitive".

Employment in Shipping Related Services

- If the country will take on the opportunity of developing maritime cluster, it will open another **employment option on shipping related services** for Filipino seafarers who have reached the highest position on board and likewise those planning to retire. Other seafarers will be given a chance to progress into officership when some of the officers have been diverted to other shipping related jobs. As a result, the country has the potential to become a maritime services hub, just like Singapore. Initially, a decrease in the number of Management Level Officers (MLOs) is expected in the event that their employment is diverted to other shipping related services. But other seafarers like Operational Level Officers (OLOs) will be given a chance to progress into officership, specifically on management level positions, when some of the officers have been diverted to other shipping related jobs.

- ASEAN Integration has much to offer to the 600 million consumer market. As economic activities accelerate, more trade will happen within and out of the region. Consequently, demand for shipping services will rise and translates into higher demand for maritime manpower not only for seafarers but as well for related shipping services such as shipping management, ship survey and audit, logistics, education and training and other related business in the maritime cluster.

5. RECOMMENDATIONS

Based on the findings of the study, the following recommendations are being put forward for appropriate action by the manpower development and employment sector of the Philippine maritime industry:

.1 **Skills enhancement at all levels**

As the Philippines will continue to supply seafarers with focus on the ASEAN region, the traditional seafaring skills remain to be in demand and therefore should be continually enhanced. Even without the AEC skills enhancement at all levels should always be a priority for the sector.

- To enhance competitiveness, **MLOs should be equipped with additional skills** on ship superintendency, ship survey, ship management, and logistics to meet the demand for maritime manpower in related shipping services.
- There is a need to **develop short courses/programs** on ship superintendency, ship survey, ship management, ship audit, and other related courses for personnel in the maritime cluster.
- **For OLOs**, the maritime industry should prepare them for higher responsibilities on board by providing them value addition trainings such as leadership/management capabilities.
- **Ratings**, on the other hand, have to undergo value addition trainings like cargo winch operation, etc.
- **Seafarers coming from domestic shipping** wanting to enter the ASEAN market or if they choose to remain employed in domestic ships should enhance their competence to be at par with Filipino seafarers already serving on oceangoing ships and with other ASEAN nationalities. Improving their skills will make them compete effectively for more difficult roles expected on the more sophisticated ships in the near future.

.2 **Provide financial assistance to seafarers in domestic shipping**

Seafarers in domestic shipping have their own set of training requirements. What they need is the financial assistance so they will be able to take up these courses. Financial assistance could be in the form of training incentives, scholarships, and grants.

.3 **Provide support to the domestic shipping sector**

To compete successfully in this new environment, the domestic shipping company should innovate to improve quality of services, invest in skills training to retain crew/employees, update facilities and equipment. The government should therefore provide support to the domestic shipping sector to make them more efficient: subsidized capital requirements, exemption from income tax which is currently being enjoyed by those companies engaged in international shipping, among others. It is only then that they can provide benefits due to their crew.

.4 **Push and support for the passage of House Bill 3647 creating the Philippine Ship Registry System**

One of the benchmarks of a good flag of registry is its adherence and effective implementation of IMO Conventions, the country, therefore, should **improve its ratification (21 out of 51 IMO Conv) performance on IMO Conventions** as well in enacting them into local legislations. Likewise, **safety record within the country's archipelagic waters should be improved to enhance credibility** by pushing for the eradication of substandard shipping through effective implementation of proper technical standards for the safety of lives and property at sea, and the protection of the marine environment.

.5 **Start the ground work in preparation for the country's becoming a maritime services hub.** Assess current legal frameworks surrounding the maritime cluster such as equity requirements, administrative requirements to be able to establish business in the country, fiscal and incentives, among others.

.6 **The shipping sector or the manning industry should develop a roadmap which should take the industry to where it want to be in the medium and long term based on measurable tools**. In developing the road map, other stakeholders should also be involved considering that shipping is a globalized industry and strategies could not be developed in isolation. Also consider other things that the industry is more competent in developing which is how the industry can sustain its competitive advantage already in possession.

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