

Chapter 2

Challenges and Initiatives for Developing Sustainable Filipino Seafarer Supply

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Abstract:

The shipping industry is an important component of the global economy and is responsible for transporting approximately 80% of the world's trade. For the industry to function effectively, the supply of skilled seafarers is essential. This chapter describes the current state of the global seafarer labor market and the development and expansion of the Philippine shipping industry, which has a long history as a supplier of skilled seafarers, as well as the challenges and efforts to ensure a sustainable supply of Filipino seafarers to the global shipping industry. Estimates of each country's contribution to the current global supply of seafarers show that the Philippines will be the world's largest supplier of seafarers as of 2021, followed by China, Indonesia, the Russian Federation, and India. The chapter identifies the need to develop skilled seafarers, create career advancement opportunities, and further invest in training and education programs as issues that the Philippines must address in order to remain competitive in the global seafarer labor market. The report also highlights various conditions and initiatives that can contribute to a sustainable supply of Filipino seafarers, such as improving working conditions and benefits, and encouraging the younger generation to choose seafaring as a career option. The sustainable supply of skilled Filipino seafarers to the global shipping industry requires the cooperation of a wide range of stakeholders, including the Philippine government, domestic seafarer training institutions, and major shipping companies, including foreign-owned ones.

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Keywords: Global seafarer labor market, the Philippines, seafarers, marine industry, MARINA, STCW Convention, EMSA audit

I. Introduction

Filipino seafarers have a significant presence in the global seafarers' market. The challenge that the Philippines, the main supplier of seafarers, has faced to date is, simply put, the quality of its seafarers. It seems to have been recognized early on among those involved in shipping and seafarers in the Philippines that improving the quality of Filipino seafarers is an essential issue if the Philippines is to maintain its international competitiveness. For example, Peter N. Tounjis, a Greek who ran a shipping company in the Philippines, expressed a sense of crisis in his 1975 book about the rise of Bangladeshi and other seafarers and pointed out the need to maintain competitiveness by improving the quality of Filipino seafarers (Tounjis 1975). In addition, Gregorio Oca, founder of the Associated Marine Officer's and Seamen's Union of the Philippines (AMOSUP), the Philippines' largest seafarers' union, argued in a 1990 paper that improving quality to compete with Chinese seafarers is the challenge (Oca 1999). Filipino seafarers emerged, at least in the early years, with the expansion of ships of convenience. At the time, shipping companies adhered to the principle of putting their own nationals on their own ships, but at the same time they could hire foreign seafarers with low labor costs on ships of convenience from countries other than the de facto shipowner. However, as the number of ships carrying mixed with foreign seafarers increased, the human nature of seafarers gradually came under increasing scrutiny and critics began to argue that flag-of-convenience ships threatened the working and employment conditions of seafarers and could cause unfair competition with shipowners from other countries. Against this background, the issue of seafarer qualifications has been raised from two aspects: worker protection and ship safety. One of the triggers for this is the growing emphasis on the protection of seafarers in developing countries which has been triggered by the emergence of the problem of seafarers being forced to work for low wages and in poor working conditions, combined with the ineffectiveness of flag-of-convenience regulations for such vessels.

The International Convention on Standards of Training, Certification and Watchkeeping for Seafarers (hereinafter referred to as the STCW Convention)² was established in 1978 as an international standard to maintain the quality of seafarers in such a working environment.

² Please see at International Convention on Standards of Training, Certification and Watchkeeping for Seafarers, 1978 (imo.org) accessed on 1 December 2022.

Subsequently, a comprehensive review of the Convention’s annexes was conducted with the aim of eliminating, as far as possible, human factors and related provisions that could lead to maritime accidents. This was followed by a second comprehensive review of the Annexes in the 2010 Manila Amendments³. In recent years, the Philippine government has been audited by the European Maritime Safety Agency (hereinafter referred to as the EMSA) in accordance with the STCW Convention, the international standard for maritime safety. Since the initial audit in February 2006, several areas of concern have continued to be raised, and the Philippines is in the process of addressing the audit findings through the promotion of maritime administrative reform. A deemed inadequate response by the Philippine Government could mean that the quality of Filipino seafarers would not be approved by EMSA, which could result in Filipino seafarers being unable to work on European-flagged vessels. For this reason, European shipping lines in Denmark, Germany and the UK that actively employ Filipino seafarers are closely monitoring the status of EMSA’s audits of the Philippines. The administrative reforms that will be undertaken in light of these external audits could be painful, however, the Philippine government’s effort to comply with the STCW Convention shall be a precious opportunity for the Philippines, the world’s largest supplier of seafarers, to maintain a sustainable supply of seafarers into the future. The high remuneration paid to merchant seamen in the Philippines has increased the popularity of seafaring as a profession, and many young people are now aspiring to become seafarers. At the same time, EMSA’s view is that the number of merchant marine colleges and seafarer training institution has increased rapidly in proportion to the increase in the number of applicants, resulting in deficiencies in the curricula and instructors at these institutions. Another major problem was the discovery that false Seafarer’s Identification Records Books (SIRBs) were being issued in the Philippines. EMSA recommends that the Philippine government rectify these problems and bring its seafarer training curriculum, facilities, and environment in line with international standards. While there are many areas to review, this chapter will first provide an overview of the global seafarer labor market, focusing on the major players.

II. Overview of the global seafarer labor market

³ Please see at <https://www.ics-shipping.org/wp-content/uploads/2020/08/manila-amendments-to-the-stcw-convention.pdf#:~:text=New%20wide-ranging%20amendments%20to%20the%20STCW%20rules%2C%20agreed,of%20technical%20developments%20that%20require%20new%20shipboard%20competences> accessed on 15 December 2022.

The global seafarer labor market is a complex and dynamic industry, offering a wide variety of employment opportunities for maritime school and university graduates. Key features of this market include internationality, competitive salaries, diversity of employers, strict working conditions, and an evolving regulatory environment. Internationality means that the labor market for seafarers is completely global. It was mentioned earlier that the profession of seafarers who can sail around the world on vessels registered in various countries and earn foreign currency to send back to their home countries, is very popular among Filipino youth, not to mention there is always the high demand for skilled seafarers in this field. With the growth of the shipping industry comes a high demand for skilled workers, including officers, engineers, ratings, and other professionals. They are also characterized by their high salaries. Seafarer salaries can be quite competitive, especially for those with specialized skills and experience. Although seafarers are in a profession that requires a readiness to work under difficult conditions, including long periods away from home, exposure to severe weather, and safety hazards, the financial rewards more than make up for it. This professionalism of seafarers has led to a variety of matters related to safety and working conditions at sea being subject to international regulation. Seafarers must be familiar with these regulations and comply with them in their work. The global labor market for seafarers offers a variety of exciting and rewarding career opportunities, but also requires a high level of skill, adaptability, and resilience. Graduates of maritime schools and universities are expected to continue to develop their skills by gaining work experience and continuing education after starting work as seafarers, and by developing their expertise considering the latest technical information and regulations.

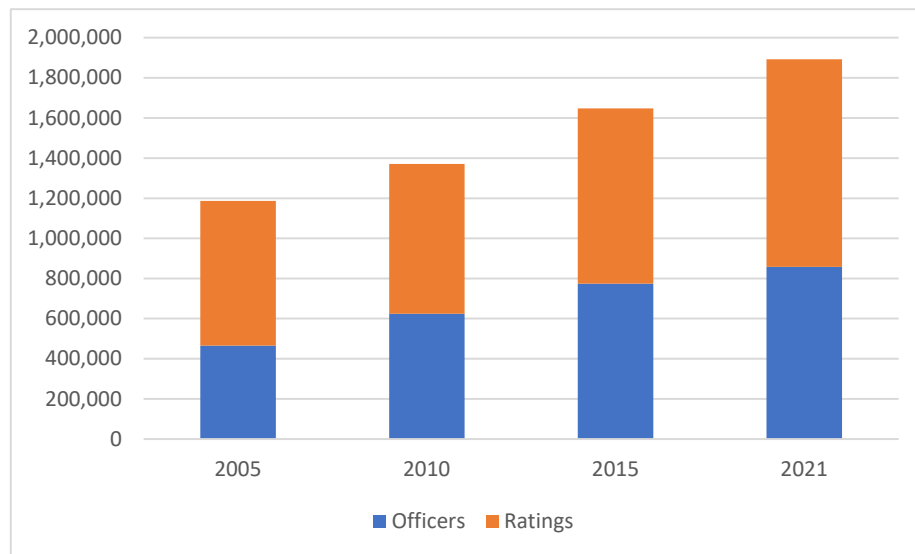
To begin with, let us review the definition of a seafarer. Seafarers are individuals who work onboard ships or other vessels and whose job involves the operation, maintenance, or navigation of these vessels. They are often involved in the transportation of goods or people and may work in a variety of roles, such as deck officers, engineers, or ratings. There are two types of seafarers, the one is a captain, a high-grade licensed mariner who holds ultimate command and responsibility of a merchant vessel. The other is seafarers that includes officers and ratings. Officers oversee navigator, chief of engineer, engineer, chief of radio operator, chief of clerk, clerks, doctors and so forth. They all have maritime qualification. On the contrary, ratings are seafarers other than officers without maritime qualification. They mainly work as deckhands, steersmen, galley hands and so forth⁴.

⁴ Please note that this chapter focuses on seafarers working on ocean-going merchant fleets covered by the STCW Convention. Oceangoing seafarers and coastal seafarers are two different types of seafarers with different job

The ocean-going merchant fleet plays an important role in the global shipping industry. These fleets have several characteristics, including their size, crew, and cargo types, applied technology, and efficiency. Firstly, ocean-going merchant vessels are generally larger than coastal and inland vessels because they must sail longer distances and carry a larger volume of cargo. As such, they are designed to carry more cargo and withstand the harsh conditions of long-distance shipping. Secondly, reflecting the globalization of the shipping industry, they often employ multinational crews. These crews typically consist of people of various nationalities and backgrounds, working together to ensure safe and efficient vessel operations. The ability to work effectively in multicultural teams is a crucial element in crew selection and training. Thirdly, ocean-going merchant vessels are capable of carrying a wide variety of cargoes, including containers, bulk cargoes, and specialized cargoes such as liquid natural gas and hazardous materials. The diversity of cargoes requires advanced technology in terms of cargo handling equipment, navigation systems, and communication systems to ensure safe and efficient handling. Fourthly, modern ocean-going merchant vessels are equipped with advanced technologies such as navigation systems, cargo handling equipment, and communication systems to ensure safe and efficient operation. The application of technology has improved vessel safety, cargo handling efficiency, and environmental performance. In addition, the use of efficient engines and optimized routes minimize fuel consumption, reduce emissions, and lower operating costs. Finally, ocean-going merchant vessels must comply with a variety of international standards and regulations related to safety, environmental protection, and working conditions. These standards are established by organizations such as the International Maritime Organization (hereinafter referred to as the IMO) and enforced by flag state authorities and port control inspections. Compliance with international standards ensures safe and sustainable maritime transport and enhances the industry's reputation as a responsible and ethical global player. In short, the ocean merchant fleet is an important component of the global economy, facilitating the transportation of goods and raw materials around the world. By adopting advanced technology and adhering to international standards and regulations, the fleet ensures safe, efficient, and sustainable maritime transportation. The continued growth and success of the maritime industry depends on its ability to adapt to changing market conditions, technological advances, and regulatory requirements.

descriptions and work environments. Ocean going seafarers work on large vessels that traverse the oceans, transporting and passengers internationally. They may also be responsible for managing cargo, ensuring passenger safety and complying with international maritime regulations.

Table 1: Estimated global supply of seafarer 2005-2021



Source: Created by the author based on data from BIMCO (2015 and 2021)

The table above provides a comprehensive view of the global supply of seafarers from 2005 to 2021. It reveals that the estimated global supply of seafarers will increase significantly each year, reaching a total of 1,892,720 seafarers in 2021. This figure indicates that 857,540 of these seafarers will be officers and 1,035,180 will be classified as non-commissioned or classified seafarers. It further highlights that the supply of STCW certified seafarers available to the global merchant fleet engaged in international trade has consistently increased since 2015. In particular, the number of qualified and classified seafarers continues to grow, with the number of STCW certified seafarers increasing by 10.8% since the 2015 report. Notably, the number of STCW certified seafarers has surged 18.5% since 2015, a positive sign for the availability of skilled seafarers in the global maritime industry. The increasing supply of seafarers is an important development for the maritime industry, especially as the global economy continues to expand and meet the growing demand for maritime workers. This trend may also indicate the effectiveness of various initiatives taken by the maritime industry and regulatory agencies to address the seafarer shortage in recent years. In conclusion, it can be seen that the table above highlights an increase in the estimated global seafarer supply between 2005 and 2021 and a significant increase in the number of STCW certified seafarers available to the global merchant fleet. This upward trend in the supply of seafarers is an extremely important development for the maritime industry and is indicative of ongoing efforts to address the longstanding issue of a shortage of skilled maritime workers.

As shipping is a global industry, the seafarer workforce is diverse, with many different countries contributing to the overall workforce. Seafarers come from a variety of backgrounds and cultures and bring unique perspectives and experiences to the industry. The global supply of seafarers is constantly changing due to the emergence of new generations of seafarers and the impact of economic and political factors on the shipping industry. According to estimates, there are several countries that have consistently reported the highest number of seafarers over the past few years: the Philippines, Russia, China, Indonesia, Russia, and Ukraine are examples. Together, these countries account for a significant portion of the world's seafarer labor supply. This is due to their proximity to major shipping routes, the availability of training programs and educational opportunities for seafarers, and the unique economic conditions in each country where seafarers can earn foreign currency by working as seafarers.

While these countries contribute to the global supply of seafarers, it should be noted that seafarers come from many other countries in the world. The diversity of seafarers is one of their strengths in that they can bring different perspectives and experiences. However, it is also important for the shipping industry to ensure that all seafarers are treated fairly and have the support they need to do their jobs safely and effectively. This includes adequate training, good working conditions, and access to medical and other support services at sea. According to estimates of each country’s contribution to the current global supply of seafarers, the five countries reporting the highest number of seafarers in 2015 and 2021 are as follows:

Table 2: Estimated 5 largest seafarer supply countries (2021)

	All Seafarers	Officers	Ratings
1	Philippines	Philippines	Philippines
2	Russian Federation	Russian Federation	Russian Federation
3	Indonesia	China	Indonesia
4	China	India	China
5	India	Indonesia	India

Source: Created by the author based on data from BIMCO (2021)

Table 3: Estimated 5 largest seafarer supply countries (2015)

	All Seafarers	Officers	Ratings
1	China	China	Philippines
2	Philippines	Philippines	China
3	Indonesia	India	Indonesia
4	Russian Federation	Indonesia	Russian Federation
5	Ukraine	Russian federation	Ukraine

Source: Created by the author based on data from BIMCO (2015)

The five countries with the largest number of seafarers in 2021 are the Philippines, the Russian Federation, Indonesia, China, and India. Together, these five countries will account for 44% of the world's seafarer supply. Data collected from shipping companies by BIMCO, the largest international shipping organization, shows that the five main nationalities of STCW seafarers working in the world merchant fleet are the Philippines, Russian Federation, Indonesia, China, and India. The BIMCO report (2021) shows that the majority of seafarers are from Asia, covering the region from East to South, while Europe and North America each represent a smaller percentage of the seafarer population. Besides, when it comes to the breakdown by rank, the report shows that there are significant differences in the nationalities of seafarers by tier.

Understanding the nationality ranks of seafarers is significant for several reasons. Firstly, it has practical implications for the industry. For example, diverse nationalities have different cultural norms, language abilities, and technical skills that may affect their suitability for certain roles and understanding these differences can help employers make more informed decisions about hiring and training. Secondly, recognizing the importance of seafarer nationality can underscore the important role seafarers play in the global economy. The shipping industry is responsible for a large portion of international trade and having seafarers of different nationalities helps us better understand the global nature of this important industry.

From the above statistics comparing 2015 and 2021, perhaps the most striking difference is that the Philippines ranks first in the world in terms of officers, capacity, and all seafarers; the Russian Federation emerges in second place, followed by Indonesia in third place. Note that Ukraine, which ranked 5th in 2015, is no longer ranked, perhaps due to the invasion of Ukraine by the Russian Federation. Replacing Ukraine on the rise is India, the main supplier of seafarers in South Asia.

III. Development and expansion of the Philippine maritime industry

Seafarers are an integral part of the global shipping industry, playing a vital role in transporting goods and people across the world's oceans, and in other ways related to trade and the movement of people. Seafarers are responsible for the operation and maintenance of ships around the world, from small fishing boats to huge container ship and they are highly skilled professionals who serve in a variety of roles, including deck hands, engineers, and crew members. Without them, the shipping industry would not stand still and would have a major impact on global trade. Moreover, seafarers face unique challenges in the performance of their duties, such as safety, physical and mental health, and well-being at all times. These include being away from home and family for extended periods of time on maritime duty, thus isolating themselves from life ashore, and being exposed to hazardous conditions due to wash duty.

The COVID-19 pandemic has further highlighted the uniqueness of these duties for seafarers, as many seafarers were stranded at sea and unable to disembark or return home⁵. Needless to say, seafaring offers significant opportunities for many countries, particularly those with large numbers of seafarers. For example, the Philippines is the largest single source of seafarers worldwide in the industry and the income generated by seafaring can have a significant positive impact on the economies of the country.

In recent years, the term "maritime cluster" has been increasingly used in Japan to refer to the totality of shipping, shipbuilding, and related industries. On the other hand, in the Philippines, the "maritime industry" centering on shipping was defined as a policy area in the 1970s. The term "maritime industry" was first used in legislation in the Maritime Industry Decree (Presidential Decree No. 474 of 1974) enacted in 1974 during the Marcos administration. This decree established the Maritime Industry Authority (MARINA). The Maritime Industry is defined in the same decree as follows. The Decree defines the maritime industry as "the design, construction, manufacture, acquisition, operation, supply, repair and/or maintenance of ships or their components, as well as the operation of regular shipping lines, stevedoring arrastres, customs brokers, shipyards, dry docks, marine railways, marine repair ships, shipping and shipping companies, shipping and shipping companies. Companies engaged in the operation or operation

⁵ UN News Global perspective Human stories, "UN and partners press for seafarers to be designated 'key workers' during COVID pandemic" at UN and partners press for seafarers to be designated 'key workers' during COVID pandemic | UN News accessed on 10 December 2022.

of marine repair ships, marine railways, freight forwarding agencies, etc.". The reason why seafarers are not explicitly mentioned in this definition, even though the overseas employment of seafarers had already begun to increase, is probably because other government agencies, also created by the Marcos administration, had jurisdiction over matters such as seafarer training and certification systems and overseas employment.

For example, the National Seamen's Board (NSB) was established by the Labor Code of 1974 and later taken over by the Philippine Overseas Employment Administration (POEA)⁶, established in 1982. (POEA), established in 1982. The Philippine Coast Guard (PCG), which was established in the Philippines, was also responsible for the qualification and training of seafarers. However, the overseas employment of Filipino seafarers and the rapid expansion of the crewing industry that supports it have led to the positioning of seafarers and other human resources as one of the pillars of the maritime industry. Today, the Philippine maritime industry is divided into four pillars: shipping, ports, shipbuilding, and human resources.

It is difficult to find a comprehensive study of the history of the Philippine maritime industry, but some references are made in studies of Philippine economic history, and fragmentary information is sometimes provided on the websites of Philippine companies and organizations. While there are numerous studies on Filipino seafarers, Philippine ocean-going vessels do not seem to be on the chopping block much at present. This is because the Philippine merchant fleet is hardly the mainstay of today's shipping in terms of tonnage. However, during the postwar period from the 1950s to the 1960s, there was a time when the Philippines attracted attention as an emerging shipping nation.

This is probably because, while many developing countries focused on developing their own shipping industries after the war, the Philippines, which was rapidly expanding its shipping industry, was seen as a threat to Japanese shipping, which was still recovering from the ravages of war. Matsuo (1963), focusing on the emerging shipping countries of Southeast Asia, cited the following reasons why many of the developing countries that gained independence after the war worked to foster ocean shipping: 1) saving on foreign currency expenditures, 2) existence of ship loans by the World Bank and various shipbuilding countries, 3) checks against high shipping rates on routes from their own countries to other parts of the world, 4) existence of merchant fleets under

⁶ The Philippine Overseas Employment Administration (POEA) has been upgraded into Department of Migrant Workers (DMW7) in 2022 under the Republic Act of 11641 enacted on 12 January 2022. For details, please see at <http://officialgazette.gov.ph/2021/12/30/republic-act-no-11641/> accessed on 18 February 2023.

their own flag (Matsuo 1963: 141-145). In the Philippines, the saving of foreign currency was also a major reason for the promotion of an ocean-going merchant fleet.

A. Pre-independence shipping: Enrique in Malacca

Inquire about the history of Filipino seafarers in the Philippines, and you will encounter people who will be the first to mention the name "Enrique of Malacca. Enrique of Malacca is the man who is said to have sailed with Majelan as his slave on his successful circumnavigation of the world. The account written by Antonio Pigafetta (1491-1534), a survivor of Majelan's voyage (Pigafetta 2011) and based on it by the Austrian writer Stefan Zweig (1881-1942) Enrique appears in a biographical novel by Magellan (Zweig 1972). He states that Magellan "obtained" him in Malacca and brought him back to Portugal. Enrique was of Malay descent and understood the local language and served as an interpreter when Magellan's fleet reached the area that is now the Philippines. After Majelan was killed by Lapu-Lapu on Mactan Island, the king of Cebu, who had initially cooperated with him, attempted to kill the remaining Spaniards, and only those who survived this predicament were able to return to Spain. Enrique disappeared afterwards, but is depicted as having been in touch with the king of Cebu.

One of the reasons why Enrique has attracted so much attention is that it is believed that he was the first person to circumnavigate the world, not Majelan. Another reason why Enrique is well known to Filipinos may be since he appears in a story that portrays Lapu-Lapu, the murderer of Magellan, as a hero.

B. The Galleon Trade and Filipino Seafarers

The discovery of the Pacific Ocean route between Manila and Acapulco, Mexico, and the galleon trade through it characterized the period of Spanish rule. From 1750 to 1815, two galleons sailed annually from Manila to Acapulco. In the early years, one out of every five crew members was Filipino, and by the end of the period, 50-80% were Filipinos. Other crew members were Spanish, Mexican, and Portuguese (Mercene 2007: 3). Many of them fled in Mexico and did not return to the Philippines. Some of the mestizos, who were of mixed Spanish descent, traveled as merchants, engineers, or officers (Mercene 2007: 3). Although the training of seafarers during the galleon trade is not clear, Filipino seafarers appear to have been held in high esteem. The King of Spain was more desirous of encouraging the enlistment of Filipinos in the company's fleet

(service), stating that "the natives of the Philippines have always shown talent and propensity for the sea" (Shurz 1920: 501).

Galleons were also built in the Philippines: according to Mercen (2007), more than 100 galleons were built in the Philippines during two and a half centuries. Most were built in Cavite, while others were built in Pangasinan, Albay, Mindoro, Marinduque, and Iloilo (Mercen 2007: 1-2). Labor for log cutting and sawing operations was procured through forced labor (*polo y servicio*) (Mercene 2007: 2).

C. The liberalization of the port of Manila

In 1834, Manila was declared a free port, allowing foreign ships to freely come and go as they pleased, and in the 19th century, shipping changed with the technological revolution from steamships to steamships. After the liberalization of Manila's port, shipping was not dominated by Spain, the suzerain state of the Philippines, but by the British, Americans, and even Japanese, who were expanding their colonies in Asia. The Philippines' trade in the 19th century was characterized by the export of world commodities such as sugar and abaca (Manila hemp). Leyte and Negros Occidental are well-known sugar-producing areas, and even today these areas are major suppliers of seafarers, suggesting the close relationship between sugar and maritime transport.

Sugar exports to the U.S. also played an important role for Japan's shipping industry. The newly emerging Japanese shipping industry established a dominant presence in shipping in the Asia-Pacific region before the war. U.S. sugar exports from the Philippines to the U.S. played a very important role for Japanese shipping: in 1933, 33% of Japanese ships' cargoes came from the Philippines (Isaka 1934).

Japanese shipping suffered devastating losses in World War II. The resumption of Japanese ocean shipping from occupation was allowed, for example, in 1951, when Japanese shipping companies re-entered the Tokyo-New York route, taking cargoes of sugar in the Philippines before heading to North America to make a profit, according to the report. The Philippines was also important to postwar Japanese shipping.

In the 19th century, the production and export of sugar and abaca (Manila hemp), which were world commodities, expanded in the Philippines, and shipping expanded accordingly. Spain was a weak player in shipping during this period, with Britain, which was also an important consumer and expanding its colonies in Asia, and the United States, which was growing as a shipping power, playing important roles, and the newly emerging nation of Japan joining them.

Madrigal Steamship Co. and De La Rama Steamship Co. were the first Philippine companies to enter the ocean shipping business (Nagano 1990: 120). De La Rama Steamship was

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founded by Esteban de la Rama, a member of the sugar aristocracy who made his fortune in the sugar business in Negros Occidental and acquired four ocean-going ships in 1937 (Nagano 1990: 120). Even today, the Visayas region is one source of seafarers, and it is likely that this tradition was closely related to the export of primary commodities such as sugar. Lacson, founder of the Jackson Merchant Marine College, a private college in Iloilo, was a seaman, but his family was involved in the sugar trade.

There was also a movement to create a merchant marine during the U.S. administration. In 1918, Act No. 2754 (authorized February 23, 1918) was enacted for the "Creation and Promotion of a National Merchant Marine." This law provided that the Minister of Commerce and Communications, with the consent of the presiding officers of both houses of the Legislature and the approval of the Governor General, shall have the authority to create and promote a national merchant marine "engaged in the transportation of goods in favor of the import and export of the Philippine Islands" (s. 1). The details of said section are as follows:

Box 1: Creation and Promotion of a National Merchant Marine Act (Section 1&2) ⁷

【Section 1】

(a) To organize one or more corporations for the purpose of engaging in the construction and repair of ships or the acquisition thereof, or the carriage of passengers and cargo (freight) by sea, or both.

(b) To acquire, for the government of the Philippine Islands, shares or interests in any corporation, company or association engaged in any of the business activities set forth in the preceding item.

(c) To subsidize navigation lines to foreign countries.

(d) To hold and maintain a domestic merchant marine registry now registered or hereafter may be registered in any port in the Philippine Islands

(e) To exercise such other powers as may be necessary for the creation, encouragement and maintenance of foreign maritime traffic in the Philippine Islands.

【Section 2】

(a) that all vessels belonging to such enterprises shall be subject to exclusive government service, if the Governor General certifies that the public interest so requires

(b) that such vessels shall have priority in the transportation of Government mail and other cargoes and products of the State

(c) that such vessels are constructed or repaired in accordance with plans and specifications approved by the Minister of Commerce and Communications

(d) Such other conditions as the Minister of Commerce and Communications deems appropriate to impose.

Source: Created by the author

Although the operation of this law is not clear, along with the National Bank of the Philippines, the National Development Company (NDC) was established in 1919 (Act 2849), however, was criticized for its profligate management that led to problems with the NDC falling into a state of bankruptcy (Satoshi Nakano 2002: 144-145). As will be discussed below, NDC became a receptacle for the development of an ocean-going merchant fleet after the war.

⁷ Section 1 Section 2 shall provide, as condition precedent to the investment or expenditure of public funds to endow, cooperate with, support or subsidize shipping concerns in accordance with Section 1.

D. The search for postwar Philippine shipping

During the war, Japanese and Philippine shipping shared the devastation caused by the war, although they were in different positions. At the start of the Pacific War, Japan had 1,962 merchant ships (6,094,271 gross tons). However, after the war only 56 ocean-going cargo ships (366,000 gross tons) were in service. Seafarer deaths totaled 76,067, a casualty rate higher than that of military personnel (Miwa 1992: 4-6). While under the occupation, Japanese shipping companies were allowed to resume service by tramper in 1948 and by liner in 1951, but they were forced to compete with foreign shipping lines that had already entered the market (Nakagawa 1992). In addition, the Philippine shipping company De La Rama Steamship Company was in service on the New York route (Nakagawa 1992: 25).

With regard to the situation in the Philippines, Matsuo (1963) describes the prewar shipping situation in the Philippines as follows. In the Philippines, "prewar tonnage was about 3,500 vessels with a capacity of 155,000 tons. Inter-island traffic is carried on by about 160 vessels operated by 50 shipping companies on routes connecting important ports and cities in the archipelago. Although Philippine-flagged vessels accounted for less than 1% of Philippine foreign trade, in May 1941 at least nine Philippine-flagged vessels of 38,000 tons were sailing overseas" (Matsuo 1963: 170).

The Pacific War also took a heavy toll on the Philippine shipping industry. According to Matsuo (1963), again, "At the outbreak of the war, almost all ships were sunk, seized by the military, or captured by the Japanese, so that by the time the Philippines was liberated, there were few ships available for domestic traffic. Payments made to shipowners as compensation for war damages amounted to 85 million pesos in reacquisition value" (Matsuo 1963: 171). When the Philippines was liberated by the Allied forces, there were only three ocean-going ships (Matsuo 1963: 145).

E. The Rise of the Philippine Shipping Industry

After the war, India and the Philippines attracted attention as two of the developing countries in Asia that were making efforts to expand their own merchant fleets (Matsuo 1963). The Philippines gained independence in 1946. Manuel Roxas, the last president of the Commonwealth period after the return of the U.S. military, became the first president of the

Republic of the Philippines after independence (July 4, 1946 - April 15, 1948). Then, Elpidio Quirino, who had been President Roxas' vice president, became the second president (April 15, 1948 - December 29, 1953).

It was during the presidency of the third President Magsaysay and the fourth President Garcia, who was elevated from vice president to president following his accidental death, that measures related to the maritime industry took shape.

During Magsaysay's presidency, the Overseas Shipping Act of 1955 (RA1402) was enacted, and in 1957 the Coastwise Shipping Act of 1957 (RA1909) was passed under President Garcia. After the war, new shipping companies with Philippine capital were born. One of them was the Magsaysay Group. The group was founded in 1948 by President Magsaysay's family, Don Ambrosio A. Magsaysay, and his son-in-law, Robert C.F. Ho, as A. Magsaysay Incorporated. Incorporated), founded in 1948 by A. Magsaysay and his son-in-law Robert C.F. Ho. The company exported woodchips and other dry bulk products to China. Ho and Miguel Magsaysay were active in the Filipino Shipowners Association (FSA) in the 1950s and are credited with drafting and enacting the Oceangoing Shipping Act of 1955. In 1958, United Philippine Lines, a consortium of Filipino shipowners led by Magsaysay, was formed to enter the Asia-North America route, with 18 vessels in operation, including seven new buildings.

The Philippine government enacted the Oceangoing Shipping Act of 1955, which specifically provided for (1) income tax exemption for Filipino citizens or corporations engaged in the ocean shipping and shipbuilding industry for a period of 10 years from the enactment of the Act (subject to investment of net profits), and (2) a tax exemption for ships through the National Development Company (NDC), and (2) loans (20 million pesos per year in a fund) to businesses and acquisition (shipbuilding, purchase, etc.) of vessels through the NDC. In other words, like Japan's planned shipbuilding, it encouraged shipping companies to acquire new vessels. The government also created the state-owned National Marine Corporation (NMC) under NDC, which was privatized in 1988 and joined the Magsaysay Group.

The Philippine merchant fleet's expansion was made possible by the acquisition of surplus wartime-standard vessels from the United States as part of reconstruction assistance, and by postwar compensation from Japan. By 1960, postwar compensation enabled the Philippine side to acquire 14 fast ocean-going vessels through the National Development Corporation (NDC), equivalent to one-third of its shipping capacity at the time. These included two Eastern Shipping vessels, four Philippine Ace Lines, one Liberation Steamship, three Copania Maritima vessels, one Botelho Shipping vessel, one General Shipping vessel, and two Magsaysay Lines 2 vessels (Yoshikawa 2004: 424). Furthermore, because of the acquisition of the vessels, the U.S. and Japan had strong concerns about the impact on their own shipping operations, although their presence as

a shipping nation was not high. The Philippine side used loans secured by compensation. They aimed to acquire more high-speed vessels, but they were limited to one high-speed vessel per year through the provision of compensation, and they also did not approve the export of 12 additional high-speed vessels ordered by the National Development Corporation, which the Philippine side had requested (Yoshikawa 2004: 424). Ultimately, 24 vessels (17 ocean-going vessels) were procured by 1971 (Yoshikawa 2004: 424).

It should be noted, however, that the purchase of ships from Japan by Philippine shipping companies was not only for war compensation. This is because, while Japan's shipping industry was devastated, Japan's shipbuilding industry was left with shipbuilding capacity that had expanded rapidly during the war, and the challenge was rather to increase its capacity utilization. The Japanese shipbuilding industry continued to build ships at low prices throughout the 1950s, as unit shipbuilding costs fell through technological innovation and advanced shipbuilding nations already had a large number of orders. The countries that took full advantage of Japan's inexpensive shipbuilding were Greece, which emerged as a shipping power after the war, and others. During the post-World War II recovery of Japan's shipbuilding industry, the export of ships was emphasized. Philippine shipping companies also purchased ships (Nakagawa 1992).

As Yoshikawa (2004) indicates, as postwar compensation, the Philippines was able to acquire ships with high speed through the National Development Corporation.

On the other hand, not all of the Philippines' ship acquisitions through postwar compensation were realized, as there was growing concern in the Japanese shipping industry that Philippine shipping companies would also deploy new vessels on international shipping routes.

F. Major Reforms under the Ferdinand Marcos Administration

It would not be an exaggeration to say that the basic framework of the maritime industry, including seafarers, was formed during the Marcos administration. This is because it was during this period that an important institutional framework was put in place.

In particular, the Maritime Industry Decree of 1974 defined the "maritime industry" and established the Maritime Industry Administration (MARINA) as its implementing agency. Maritime industry policy initially began with support for the acquisition of ocean-going vessels, and later the emphasis seems to have shifted to shipbuilding. The adoption of the STCW Convention by the S in 1978, including the complete revision of the Seafarers Law (PD97) and the establishment of the National Maritime Polytechnic (NMP) for the retraining of seafarers (PD1369), also indicated the urgent need to improve the quality of seafarer education. A distinctive measure to support the shipbuilding industry is the establishment of the NMP (Polytech: NMP).

Measures to support the shipbuilding industry included the creation of the Shipbuilding Development Fund (SDF) by Presidential Decree No. 666 in 1975 and the establishment of additional investment incentives by Presidential Decree No. 1059 in 1976. However, Presidential Decree No. 1221 of 1977 supported the shipbuilding industry by requiring Philippine-flagged ocean-going vessels to be repaired in domestic shipyards, but to no avail (Japan Marine Equipment Association 2010: 29). In addition, the development of ocean-going vessels failed to grow as planned due to the stagnation of the world economy since the 1970s and the sluggish Philippine economy. According to JICA (1984: 7), as of 1980, there were 4,056 Philippine-flagged vessels (3.55 million gross tons), including domestic vessels, and 203 foreign vessels (2.55 million gross tons) in 1982. In foreign trade, Philippine ships are estimated to have accounted for only 10.4% of exports in 1980 (9.8% in 1981) and 18.3% (19.0% in 1981) of imports in value terms (JICA 1984: 8).

IV. Challenges for sustainable Filipino seafarer supply

A. The role and function of Maritime Industry Agency

As mentioned above, the Philippine government established the Maritime Industry Authority (MARINA) in 1974 to oversee the regulation and development of the maritime industry. During the 1970s and 1980s, the Philippines emerged as a major player in the global shipping industry. During this period, MARINA played a key role in regulating the industry to ensure seaworthiness of ships and competent crews, and in the 1990s and 2000s, the shipping industry faced a number of challenges, including the Asian financial crisis and increased competition from other countries. MARINA responded by promoting the use of modern technology and investing in the training and development of seafarers. Its function covers a wide range of areas including ship registration, safety and security, training and certification of seafarers, and environmental protection. Marina is important, as it provides valuable contribution into the regulatory framework of the industry in the Philippines.

Furthermore, in 2013, an administrative reform was undertaken to consolidate the authority over maritime administration in MARINA. Republic Act No. 10635, enacted in the same year, is a law that establishes the Maritime Industry Administration (MARINA) as the single administrative agency responsible for the implementation and enforcement of the 1978 International Convention on Standards of Training, Certification and Watchkeeping for Seafarers (STCW Convention) and other relevant international agreements. In addition to it, Executive Order

No. 63, issued in 2018, further strengthened MARINA's authority, including its leading role in evaluating and monitoring maritime and engineering-related higher education programs, together with the Technical Commission for Maritime Education (TPME) and the Commission for Higher Education (CHED). Moreover, MARINA, in coordination with the Department of Health (DOH) and the Philippine Coast Guard (PCG), is responsible for establishing medical standards and related procedures for the issuance of certificates to Filipino seafarers.

This is part of an administrative reform undertaken as a measure to ensure that the Philippines complies with international maritime standards, particularly the STCW Convention, which sets minimum requirements for the training, certification, and watchkeeping of seafarers. By authorizing MARINA to oversee these matters, the Philippine government aims to improve the quality of education and training of Filipino seafarers and enhance the country's competitiveness in the global maritime industry.

One of the main functions of MARINA is ship registration. This involves the issuance of certificates of registry and licenses to ships operating in the Philippine waters, ensuring that they comply with safety and environmental regulations. MARINA also conducts inspections of ships to ensure compliance with these regulations. Another important function of MARINA is the training and certification of seafarers. MARINA is responsible for overseeing the country's maritime education and training institutions, ensuring that they meet international standards. MARINA also administers the licensing examinations for seafarers, which are required for them to work on board ships. In addition to these functions, MARINA is also responsible for ensuring the safety and security of ships and seafarers. This includes the implementation of international conventions and regulations related to ship safety, such as the International Safety Management Code (ISM Code) and the International Convention for the Prevention of Pollution from Ships (MARPOL). MARINA also works closely with other government agencies to address issues related to piracy and other maritime crimes.

B. MARINA's Policy for Compliance with the STCW Convention

The STCW (Standards of Training, Certification and Watch keeping) Convention is an international treaty that establishes minimum training and certification requirements for seafarers worldwide. As a signatory to the Convention, the Philippines is committed to ensuring that seafarers meet these standards, and MARINA is the agency responsible for the implementation of the STCW Convention in the Philippines. As the implementing agency of the STCW Convention in the Philippines, one of MARINA's main activities is to administer the licensing examination for seafarers. This examination verifies that seafarers possess the knowledge and skills necessary to

operate safely and efficiently on board ship. MARINA also supervises maritime education and training institutions in the country and must also ensure that they meet the standards set forth in the STCW Convention.

MARINA is also responsible for ensuring compliance with the requirements of the Convention. This includes enforcing regulations regarding the issuance and renewal of seafarer's certificates, inspecting vessels to ensure that they have the required crew and certificates, and enforcing disciplinary measures in the event of non-compliance. MARINA has also worked to modernize its systems and processes in line with the STCW Convention. For example, MARINA has developed an online application system for seafarer certificates, making it easier for seafarers to apply for and renew their certificates. It has also introduced a competency-based training system that emphasizes the practical skills required for seafarers.

The above demonstrates that MARINA makes every effort to ensure that seafarers meet the minimum standards required to operate a vessel safely and efficiently. From conducting licensing examinations, supervising maritime education and training institutions, complying with treaty requirements, and modernizing systems and processes, MARINA is doing its utmost to promote the quality and competitiveness of the Philippine seafarers' industry.

C. The impact of the European Maritime Safety Agency audit on the Philippine marine industry

Behind these sincere and ongoing efforts by MARINA is an audit by the European Maritime Safety Agency (EMSA), an EU agency that conducts audits of maritime administrations in third countries, including the Philippines, to ensure that the shipping industry meets international safety, security, and environmental standards. In 2018, EMSA's audit for the Philippines highlighted several issues related to the shortage of skilled seafarers, lack of career development opportunities, competition from other industries for skilled workers, and the impact of automation on seafarers' jobs.

One of the main issues identified by EMSA was the shortage of skilled seafarers in the Philippines. The country is the largest single supplier of seafarers in the world, but the shipping industry's growing demand for skilled personnel is not being met by the current supply. The recommendation from EMSA was for the Philippine government and industry to work together to improve the quality and quantity of seafarer training.

Another issue identified by EMSA was the lack of career development opportunities for seafarers. Many seafarers report feeling stuck in their current roles such as ratings, with limited opportunities for promotion or retraining. This can lead to high turnover and an exodus of skilled

workers to other industries, and EMSA recommended that the industry not only improve working conditions and benefits, but also provide more career development opportunities, for example, promotion to a captain. In addition, the EMSA also noted the competition with other industries for skilled workers. With the growth of other industries in the Philippines, such as business process outsourcing and construction, there is increasing competition for skilled personnel. The EMSA recommended that the industry work to improve its image and attractiveness as a career option, particularly for younger workers.

The EMSA audit of the Philippine maritime industry under the STCW Convention had several impacts on MARINA and Filipino seafarers. One of the main impacts of the EMSA audit was to identify areas for improvement in the Philippine maritime industry. The EMSA recommendations included the need to improve the quality and quantity of seafarer training, provide career advancement opportunities, and the need to improve working conditions and benefits for seafarers. In response, MARINA subsequently implemented several measures to address these recommendations, including the introduction of new training and certification programs and the development of career development plans for seafarers.

Another impact of the EMSA audit was the focus on ensuring compliance with international standards and regulations. The EMSA's audit identified several areas where the Philippine marine industry was not fully compliant with STCW requirements, including issuance and renewal of seafarer certificates and the inspection of ships. MARINA has since taken steps to improve its regulatory framework, including the introduction of a new quality management system and the implementation of new procedures for the issuance and renewal of seafarer certificates. In light of these remarks, MARINA and the industry are working to ensure the sustainability and competitiveness of the Philippine seafaring industry and the continued supply of skilled Filipino seafarers to the global shipping industry.

V. Conditions and initiatives for sustainable seafarer supply

A. The current status of the MARINA-led seafarer training system

This situation has prompted seafarer training institutions in the Philippines to move to a new stage of development in light of the international situation. The Philippine seafarer training system is currently undergoing a major transformation to meet the challenges facing the industry, including the shortage of skilled personnel and compliance with international standards and regulations. The Philippine government and MARINA have implemented several measures to

improve the quality and quantity of seafarer training, including the introduction of new training and certification programs that emphasize the practical skills required for navigation and the use of modern technology. These programs include the use of simulators for realistic scenarios and hands-on training for seafarer cadets.

In addition, the MARINA has also worked to improve the regulatory framework for seafarer training. This includes the accreditation of maritime education and training institutions to ensure that they meet international standards and regulations. The MARINA also introduced new procedures for the issuance and renewal of seafarer certificates, which aim to improve the efficiency and the transparency of the certification process.

MARINA is also committed to promoting seafaring as a career option; one of MARINA's main objectives is to promote seafaring as a viable career option. This includes working with the industry to improve the image and appeal of seafaring as a career option, especially among the younger generation. MARINA also works to promote seafaring through a variety of programs and initiatives, including career fairs, job placement assistance, and scholarship programs for aspiring seafarers.

B. Improvement of working condition and welfare measure for seafarers

Another area of focus for MARINA is the improvement working conditions and welfare measures for seafarers (See Chapter 1). This includes the provision of better accommodation, food and medical care on board ships, as well as measures to ensure the safety and security of seafarers. MARINA is also working to improve the social and economic welfare of seafarers, such as providing access to financial assistance and insurance programs in coordination with Overseas Workers Welfare Administration (OWWA) under Department of Migrant Workers. It is a Philippine government agency that provides financial assistance and other services to overseas Filipino workers (OFWs) that includes seafarers as sea-based workers. OWWA's financial assistance programs for seafarers are designed to provide support to seafarers and their families during periods of unemployment or financial difficulty.

One of OWWA's financial assistance programs for seafarers is the Seafarers' Upgrading Program (SUP). The program provides financial assistance to seafarers who wish to upgrade their skills and obtain higher-level certifications or qualifications. The SUP covers the cost of tuition fees, training materials and other related expenses, up to a maximum amount determined by OWWA. In addition to these programs, OWWA also provides a range of other services and benefits to seafarers and their families, including emergency repatriation, medical assistance, and

disability benefits. Seafarers can also avail of OWWA's social and welfare services, such as skills training, job placement assistance and legal assistance.

C. Development of technology and automation to support seafarers in their work

The MARINA is leading efforts to improve the seafarer training system in the Philippines, including the development of technology and automation to support seafarers in their work and ensuring that the content of such training meets international standards. One of the key areas of focus for MARINA is the development of technology and automation to support seafarers in their work. This includes the use of electronic navigation system, digital I tools and other technologies to improve safety and efficiency on board ships. The MARINA is working to ensure that seafarers are trained on the use of these technologies, including simulators that simulate real-world scenarios and provide hands-on training to seafarers. At the same time, the MARINA is also working to anticipate the impact of automation on seafaring jobs and provide training and retraining programs to prepare seafarers for new roles that may emerge as a result. The goal is to ensure that seafarers have the necessary skills and knowledge to adapt to changes in the industry and take advantage of new opportunities that may arise.

The MARINA is also working to ensure that the content of seafarer training meets international standards. This includes working to ensure that maritime education and training institutions are accredited and meet the requirements of the Standards of Training, Certification, and Watchkeeping (STCW) convention. MARINA is also working to ensure that the training and certification of seafarers comply with the regulations set forth in the STCW Convention. In addition to these efforts, MARINA is also working with the industry to identify new technologies and tools that can improve safety and efficiency on board ships. MARINA is promoting the use of technology to enhance the monitoring of ships and provide real-time data on vessel performance, fuel consumption, and other critical factors. This information can be used to optimize ship operations, reduce costs, and improve safety.

VI. Concluding note

The world seafarer labor supply is comprised of a diverse set of countries, reflecting the global nature of the shipping industry. Estimating each country's contribution to the current global supply of seafarers, the Philippines is the country reporting the highest number of seafarers in 2021.

The Philippines' longstanding presence as a major supplier of seafarers can be traced back to the 1970s, when the Philippine government began investing in maritime education and training programs. The Philippine government established the Maritime Training Council with the goal of improving the quality of seafarer education and promoting employment opportunities for seafarers in the shipping industry. Through the efforts of the Maritime Training Council, a vast network of training institutions has been established, including government-run maritime schools, private maritime schools, and training centers operated by shipping companies.

Despite these efforts, however, the Philippine shipping industry faces several challenges that jeopardize its future, including a shortage of skilled seafarers and lack of career advancement opportunities. The Philippine government and shipping industry stakeholders need to work together to address these challenges and promote a sustainable future for the shipping industry. To ensure a stable supply of quality seafarers, the government needs to increase its investment in training and education programs and improve working conditions and benefits for seafarers. In addition, the government needs to prioritize the development of technology and automation to support seafarers' work and further promote seafaring as a practical career option for young people. Japanese shipping companies are among the many foreign shipping companies that rely heavily on Filipino seafarers. However, the rapid decline in birthrates and the aging of the population have resulted in fewer young people wanting to pursue a career as seafarers, posing a major challenge for Japanese shipping companies. In response, major Japanese shipping companies including NYK Line, Mitsui O.S.K. Lines, and Kawasaki Kisen Kaisha, Ltd. have taken note of the remarkable growth of their neighbor, the Philippines, and are actively investing in the education of promising seafarer candidates by establishing seafarer training schools in the country. There are also attempts to improve the quality of seafarers and bring onboard working conditions and benefits closer to international standards.

In conclusion, in order to provide a continuous supply of skilled seafarers to the global shipping industry, advanced shipping countries must also actively take the helm and contribute to solving the problems of the Philippine shipping industry. Specifically, the Philippines should work closely with major shipping companies and seafarers' unions to improve the quality of maritime education and training programs, enhance working conditions and benefits for seafarers, and promote the maritime industry as a career option. It also goes without saying that foreign shipping companies should continue to invest in seafarer training schools in the Philippines to ensure a sustainable supply of quality seafarers. The collective efforts of all stakeholders are essential to promote a sustainable future for the Philippine shipping industry and maintain the supply of skilled Filipino seafarers to the global shipping industry.

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