

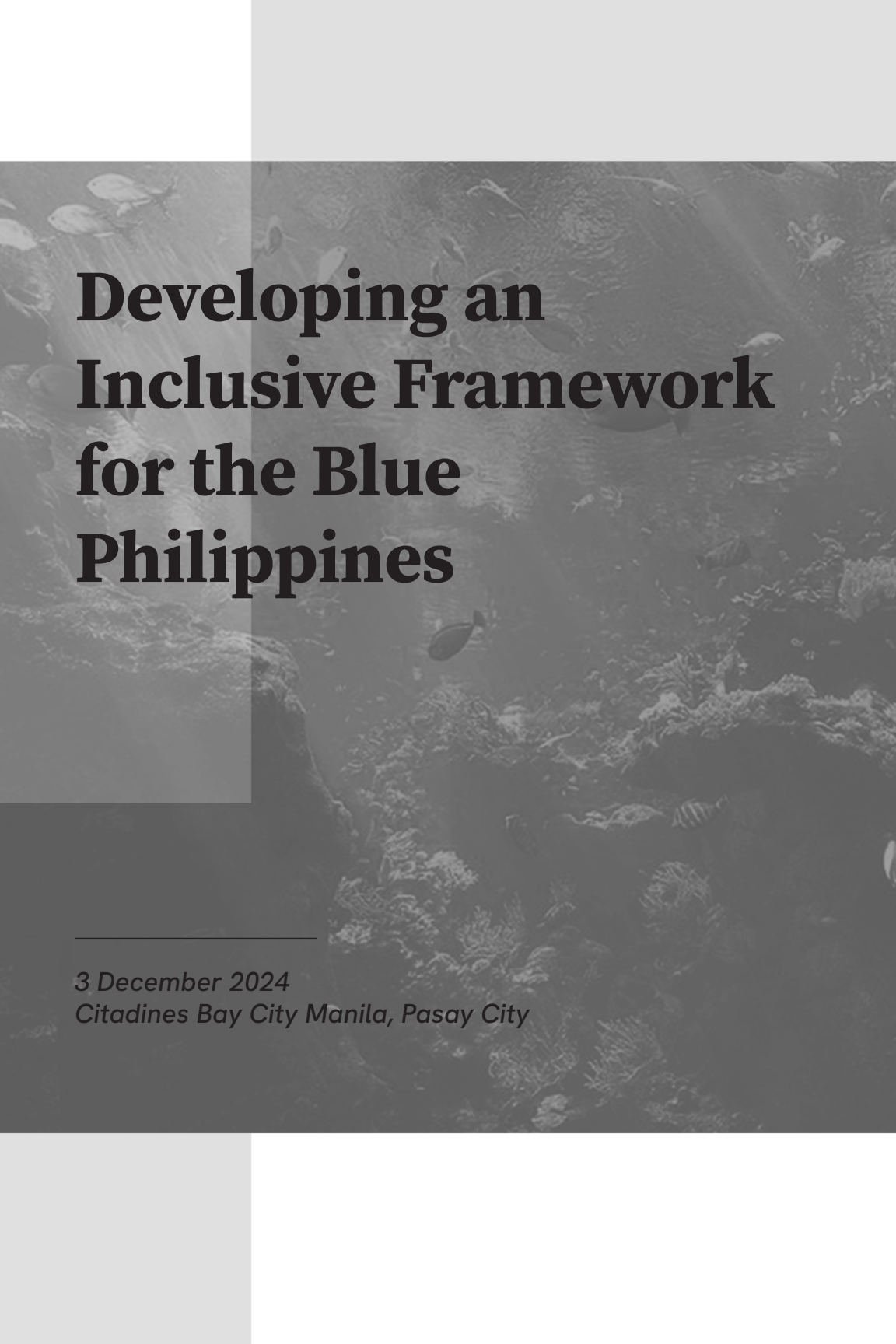
Developing an Inclusive Framework for the Blue Philippines

3 December 2024

Citadines Bay City Manila, Pasay City



UNIVERSITY OF THE PHILIPPINES
CENTER FOR
INTEGRATIVE AND
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STUDIES

The background of the entire page is a grayscale photograph of an underwater coral reef. Various types of coral, including branching and table corals, are visible. Several fish of different species are swimming throughout the scene. The lighting is soft, creating a serene underwater atmosphere. The text is overlaid on the left side of the image, with a white rectangular area behind the title for better readability.

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Telephone: (02) 8981-8500 loc. 4266 to 4268 / (02) 8426-0955

Email: cidspublications@up.edu.ph

Website: cids.up.edu.ph



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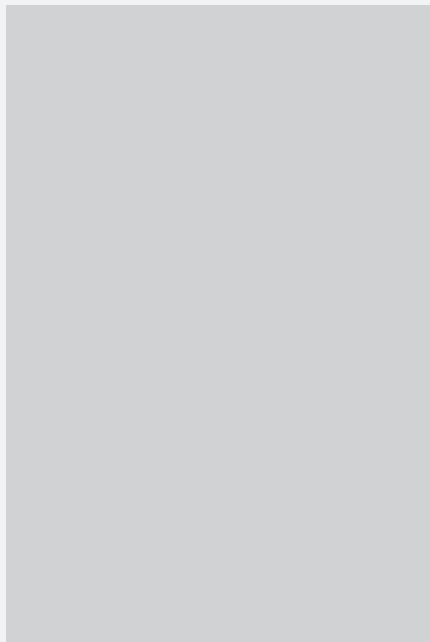
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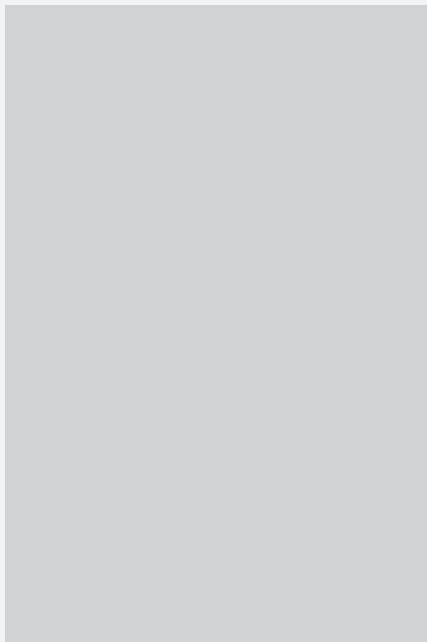
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Developing an Inclusive Framework for the Blue Philippines

Gerardo A. Borromeo

Chief Executive Officer, The PTC Group

THE PHILIPPINE BLUE ECONOMY POTENTIAL

Currently, the maritime industry in the Philippines accounts for about five percent of the country's gross domestic product (GDP). Strategic development that leverages the diverse subsectors of the maritime sector, such as maritime transport, fisheries, marine exploration, logistics, and tourism, can raise this figure to 15 to 20 percent.

The Philippines' geographic composition, with over 7,100 islands, compels the development of archipelagic connectivity with an extensive network of nautical highways and interisland waterways to link islands and provinces to drive economic activity. Mr. Borromeo said: "Our islands can only be connected by an extensive network of nautical highways. Our rivers and inland waterways serve as vital alternative highways." In this context, maritime transport serves as the backbone of this framework, enabling the efficient movement of goods and people, which in turn supports industries such as tourism, agriculture, and manufacturing. "The maritime industry, as a platform, serves as the backbone of the Philippine economy," Mr. Borromeo noted.

To realize the economic potential of the country's rich marine biodiversity and maritime sector and subsectors, the government should pursue mechanisms to facilitate ease of doing business that seamlessly integrates transport, fisheries, logistics, food production, and others. "Maritime transport, logistics, marine

environment protection, fisheries, marine leisure activities, and marine resources are all critical components of our blue economy.”

The maritime agenda for the blue economy focuses on enabling sustainable development through strategic policies and infrastructure investments. More specifically, these require cultivating sustainable practices in marine exploration, fishing, and food production and, in the long haul, modernizing maritime transportation and logistic chains. Deliberate programs and initiatives for sustainable maritime development aligned with international environmental goals ensure that growth is not pursued at the expense of ecological integrity.

BEYOND THE HORIZON: THE VALUE OF FILIPINO SEAFARERS

Filipino global maritime professionals represent a valuable segment of international maritime operations. Filipino seafarers comprise 25 percent of the global fleet workforce, and their economic impact extends far beyond remittances. Mr. Borromeo further illustrated this point: “In 2023, global trade reached almost \$24 trillion, with just under \$20 trillion moved by ships. Filipinos make up 25 percent of the international fleet workforce. That translates to over \$5 trillion of attributable value.” Mr. Borromeo segued this to call for the need to elevate prejudice over the profession and support its further development. “Kung wala kang trabaho, mag-seaman ka na lang. And yet, the attributable value of the work of Filipinos will reach something like \$5 trillion.” He contrasted this with the potential of Filipino seafarers to command salaries exceeding those of graduates from top universities, emphasizing the profession’s significance. Mr. Borromeo asserted: “If today our strength is sending Filipino seafarers, then why not 600,000, 700,000, or 800,000? What would it take for us to produce more?” He emphasized the need to reframe the narrative surrounding the maritime industry by showcasing its strategic importance and economic value.

CHALLENGES AND OPPORTUNITIES: GOVERNANCE SYSTEMS, SUSTAINABILITY FRAMEWORK, AND WORKFORCE DEVELOPMENT

The discussion highlighted the underutilization of maritime resources. Less than two percent of the nation's food supply comes from the sea, emphasizing the need to bolster fisheries and related industries. Mr. Borromeo also emphasized the need to innovate maritime education and training by aligning it with global standards that will enhance its competitiveness.

On the policy level, appropriate governance systems are recognized as integral components to realize the maritime blue economy agenda. To name a few, Mr. Borromeo identified the need to establish admiralty courts, a hierarchy of liens, and a 24/7 global ship registry that would streamline operations and attract investments in the industry. Borromeo stated, "We need admiralty courts and an enhanced ship registry system. Mongolia, a landlocked country, has over 400 ships registered, while the Philippines has only 94."

Safety was repeatedly underscored as the foundation of maritime operations. Mr. Borromeo reflected on past tragedies, such as the MV Doña Paz disaster, to advocate for the stringent enforcement of safety regulations. "If we are going to be a maritime nation, then we have to operate at the highest levels, even domestically, because safety is everyone's concern."

Aside from safety concerns, sustainability practices form the bedrock of a sustainable maritime industry. These practices include integrating science-based and data-driven policies that foster resilient public-private collaborations. Mr. Borromeo shared "Project Rise," which trains maritime professionals as first responders in vulnerable communities. Likewise, the PTC group has developed a solar-powered motion explorer that helps clean the maritime ecosystem through automated ocean waste collection. "Our 11-meter solar-powered motion explorer collects almost four metric tons of garbage daily from Manila Bay. It's a drop in the bucket, but it's a start." He insists that a clean maritime ecosystem supported by reduced plastic pollution, managed waste disposal, and programs for ecosystem restoration is essential for the sector's long-term viability.

Aside from adopting a sustainable framework, Mr. Borromeo also emphasized the importance of preparing the workforce for the evolving industry. He emphasized, “Automation, sustainability, and digital transformation are reshaping maritime work. We must prioritize STEM-based or STEAM-based education to prepare for the future.” Enhancing STEM with Arts will equip seafarers with 21st-century skills in order to navigate the volatile communication environment. Meanwhile, the older generation of seafarers can also be attuned to technology-based developments through Upskilling and reskilling programs.

To end his presentation, Mr. Borromeo challenged the attendees to embrace a whole-of-government and whole-of-society approach to realize the blue economy potential of the country: “Are we ready to act? And if not, what’s holding us back?” By uniting efforts across public and private sectors, the Philippines can build a resilient, sustainable, and globally competitive maritime industry. As Mr. Borromeo aptly stated, “Filipinos are moving the world in more ways than one.”

Presentations

Luisito delos Santos

Director of Planning and Policy Service, Maritime Industry Authority

Mr. delos Santos started his presentation with the basic yet taken-for-granted reality: “We are a maritime nation.” However, despite this, he said, the country’s legislation heavily focuses on airports and road expansion, often neglecting maritime transportation. The speaker emphasized: “No one is talking about integrating the maritime transportation system.” Thus, the Maritime Industry Authority (MARINA) proposes to increase maritime consciousness and advocacy in the government’s legislative and executive branches. This will hopefully address the neglect in the maritime industry.

CONTRIBUTIONS TO THE NATIONAL ECONOMY

The maritime industry encompasses a wide array of activities, including domestic and overseas shipping, shipbuilding, maritime manpower development, and ancillary services such as customs brokerage and freight forwarding. The sector also plays a critical role in emerging offshore interests, including oil and natural gas exploration and marine energy production.

Mr. delos Santos described the maritime sector as “growing as a vibrant segment of the Philippine economy, supporting an increasing number of industry enterprises.” This includes a classification of sea-based and land-based subsectors, highlighting capabilities in passenger and cargo shipping, maritime tourism, shipbuilding, port management, and education.

Mr. delos Santos presented an overview of the shipbuilding and ship repair industries. He shared that shipyards are classified according to ownership, ranging from Class A (foreign-owned), Class B, and Class C (both local). Class A shipyards operate in various economic zones, and by extension, they enjoy tax incentives and other perks provided by various governments. These foreign

shipyards do not produce for domestic use. Instead, they construct for export. Class B and Class C shipyards total 123, or 28 and 95, respectively. Thus, while the country remains the fifth biggest shipbuilding country, this description can be misleading because most of what is being produced domestically is being exported.

According to the available data, 95 percent of the country's shipyards are dedicated to repair and domestic shipping; 50 percent are engaged in shipbuilding activities for the local market, while another 5 percent are concentrated in construction. Mr. delos Santos said, "It's a little more expensive buying brand-new ships built in the Philippines than buying one outside through importation," to the extent that local buyers would prefer buying foreign-made ships than locally-produced ones because of the costs. This, according to him, reveals an imperative for legislative support to ramp up the local shipbuilding industry.

To provide more context, Mr. delos Santos shared that in 2023 alone, 1,254 locally produced ships were built; despite this number, however, he noted that construction has been heavily reliant on imported materials. He exposed that existing policies favor foreign shipyards that compromise domestic production. This negatively impacts the planned modernization of the country's domestic fleet and its strategic vision of adopting green technologies and complying with greenhouse gas (GHG) emission standards.

The lack of substantive support in maritime transportation has resulted in 51 out of 261 shipping routes being unserved due to a lack of players. He strongly advocated for government subsidies to the sector, similar to how the support is being provided for MRT-3. "The government has been spending billions on MRT operations," a speaker noted, "but have we heard any subsidy provided to our commuters using the maritime transport system?" Enhancing connectivity would improve economic linkages and stimulate investments in underdeveloped regions. Bridging connectivity issues will cultivate and enliven economic activity between and among regions that will aggregate and contribute to the country's economic growth.

SEAFARERS AND ECONOMIC IMPACT

Resonating with Mr. Borromeo's point on the value of seafarers, Mr. delos Santos concurs that current data shows that the Philippines remains the top global source of maritime professionals. With 808,810 seafarers as of May 2024, including 55,233 women, seafarer remittances contribute significantly to the economy, reaching \$6.8 billion in 2023. While the industry's pre-pandemic deployment levels have rebounded, challenges persist in ensuring the sustainability of this workforce.

The need for scientific, evidence-based target setting was underscored. "We don't benchmark with other countries. We're just comfortable being referred to as the source of global maritime professionals," Mr. delos Santos remarked, highlighting the importance of strategic workforce planning and workforce development.

CHALLENGES IN REGISTRATION AND LEGISLATIVE SUPPORT

Another compelling data shared by MARINA is the sustained downward trend in the number of ships flying the Philippine flag—from 430 in 1989 to 94 in 2024—which was noted as a critical concern. He contrasted this with other countries: "Even Mongolia, a landlocked country, has been able to register 400 ships." Legislative reforms to modernize the ship registration system and align it with international practices were identified as urgent priorities.

The proposed shift to a tonnage tax system and the development of an integrated maritime agenda—incorporating plans from MARINA, the Philippine Ports Authority (PPA), and the Department of Transportation (DOTr)—would address fragmentation and enhance competitiveness. To this, the speaker concluded: "The maritime industry is not just an economic driver but a cornerstone of our national identity and progress."

Jan Krianne Pineda

Corporate Partnerships Liaison, Philippine Tuna Handline Partnership

PROMOTING THE SUSTAINABLE BLUE ECONOMY

Sustainability in the blue economy emphasizes balancing economic growth with ecological preservation. According to Ms. Pineda, “The sustainable blue economy doesn’t rely on short-term GDP growth; we ensure long-term impacts on our ocean ecosystem.”

The Philippine Tuna Handline Partnership (PTHP) combines sustainable fishing methods, eco-label certifications, and strategic partnerships throughout the supply chain. Certification programs, like the MSC label, offer guarantees for environmentally aware consumers and encourage stakeholders to embrace sustainable practices.

PTHP is the first and only MSC-certified fishery in the Philippines, specializing in yellowfin tuna caught using the handline method. The MSC standard evaluates fisheries based on three key pillars: the sustainability of fish stocks, the impact on ecosystems—including interactions with endangered and protected species—and the effectiveness of fishery management, particularly governance. Since receiving certification in 2021, PTHP has undergone annual audits. As Ms. Pineda explained, “MSC certification is not just about meeting standards; it’s about securing the future of our fisheries for the environment and the people.”

TURNING THE TIDES TOWARD SUSTAINABLE FISHING PRACTICES

The discussion highlighted significant challenges small-scale fisheries face in maintaining and expanding MSC certification. Limited capacity is a major issue, as only 28 percent of the 580 municipal vessels in PTHP’s Unit of Certification (UoC) actively supply the supply chain. Ms. Pineda explained, “High input costs, like rising fuel prices, make it difficult for small-scale fishers to participate.”

They have also noted that limited cod storage facilities and unstable electrical supply in the provinces of Mindoro and Bicol have resulted in quality issues that negatively affect export potential. According to Ms. Pineda, only 20 percent of the catch in the areas is of export quality. This issue, alongside monitoring fish catches, can increase compliance with MSC standards.

To overcome these challenges and meet the growing global demand for sustainable seafood, PTHP outlined strategies for scope expansion and extension. Scope expansion involves increasing participation from the current 580 vessels to over 2,800 across Mindoro and Bicol by integrating additional vessels into the Unit of Assessment (UoA). Scope extension includes plans to expand operations beyond yellowfin tuna to include species such as skipjack, bigeye tuna, squid, and mahi-mahi. New fishing grounds and communities, such as Quezon (FMA 7 and 12), will also be engaged. These initiatives are designed to stabilize volumes, lower per-unit certification costs, and equitably distribute market incentives among small-scale fishers. “Expanding our scope means providing more fishers access to the benefits of sustainable fisheries,” Ms. Pineda emphasized.

Adhering to international standards does come with a cost. This impels the need for financial and structural investments. “Certification is not self-declared; it involves rigorous external audits and compliance with standards,” Ms. Pineda stated. While cost-sharing mechanisms between and among processors and stakeholders can be explored for sustainability, community engagement is also an integral pillar to support this endeavor. In turn, communities can be incentivized to receive 50 percent of the collected funds for their community-based projects that will benefit municipal fishers.

Despite roadblocks in the supply chain, certification costs, and other issues, it remains imperative to scale up and expand certification efforts. “In three to five years, markets may only prefer certified products,” Ms. Pineda remarked. The country’s marine biodiversity and capitalizing on our resources can position the country as one of the largest tuna producers in the Central Pacific Ocean. Securing MSC certification can further make the country more competitive while staying firm on its commitment to safeguarding marine ecosystems.

“We are a fishing nation,” Ms. Pineda emphasized. For her, making an impact involves resources, collaboration, and a collective commitment to sustainable fisheries. By scaling efforts, the Philippines can solidify its position as a leader in sustainable seafood production while supporting the livelihoods of its fishers.

Captain Lino W. Paderanga

Vice President for Professional Development and Dean of the School of Graduate Studies at the Asian Institute of Maritime Studies (AIMS)

THE ROLE OF MARITIME EDUCATION IN THE BLUE ECONOMY

Captain Paderanga complemented the discussion of the previous three speakers by providing the human capital component to achieve a blue economy. “Developing human capital is essential to fully harness the blue economy in the Philippines,” he emphasized. The Asian Institute of Maritime Studies (AIMS) plays a pivotal role in maritime education, equipping professionals with the skills necessary for sustainable development in key sectors.

Captain Paderanga identified several challenges affecting the effectiveness of Philippine maritime education. AIMS actively works to bridge the mismatch between skills and industry needs through collaborations with shipping companies, port operators, and maritime authorities. Enhanced hands-on training and internships further ensure that graduates can apply academic knowledge to real-world operations.

He identified limited access to maritime technology as a roadblock to competitive maritime education. In this regard, AIMS has partnered with global maritime organizations and technology providers to expose its students to modern training tools such as virtual simulations and other digitized platforms. AIMS is also committed to upholding international standards like the STCW (Standards of Training, Certification, and Watchkeeping) convention. Regular curriculum reviews keep programs aligned with global benchmarks, enhancing the reputation of Filipino seafarers.

Bringing education and employability, AIMS shared efforts at industry-academe partnerships to expand and broaden job opportunities for its graduates. To ensure a substantive pool of graduates for industry absorption, mortality or drop-out rates are also addressed by offering scholarships, financial aid, etc., for students who are financially challenged.

OPPORTUNITIES IN MARITIME EDUCATION

The growing international demand for Filipino seafarers highlights the necessity for specialized training that aligns with global expectations. As Captain Paderanga emphasized, this strategy enhances the employability of graduates and positions the Philippines as a frontrunner in the maritime sector.

Moreover, incorporating green shipping initiatives and sustainability into maritime education prepares students for emerging career opportunities. This includes updating the curriculum and offering practical classes on sustainable maritime practices and technological advancements, such as artificial intelligence (AI), digital tools, and virtual simulations. In addition, collaboration between industry and academia is vital for aligning educational programs with industry requirements. Establishing maritime innovation centers and conducting industry-specific workshops strengthens this relationship.

Specialized programs in maritime tourism, coastal management, and environmental law are designed to meet the increasing demand for skilled professionals in these areas. These initiatives ensure that graduates are well-prepared to contribute to sustainable development and economic growth in the blue economy.

AIMS is also proud of integrating gender diversity in its academic environment through its mentorship programs to inspire more women to enter maritime professions.

Open Forum

1. How can the Philippine Navy and other maritime stakeholders enhance their response to nontraditional security threats while also managing traditional security challenges such as territorial disputes?

Gerardo Borromeo

Mr. Borromeo emphasized the critical role of green fuel availability and renewable energy, acknowledging the complex character of transitioning to green technologies. He noted that “the shipping industry is already the lowest-polluting-per-ton-mile sector.” Further improvements depend on the energy sector’s ability to produce renewable fuels such as methane and ammonia in their green states. Mr. Borromeo notes that companies have been experimenting with dual-fuel vessels that use both fossil and non-fossil fuels. They have been hedging their investments while waiting for definitive fuel trends. Mr. Borromeo also takes note of consumer impact. Transition costs for green fuels would contribute to an increase in the prices of consumer goods from \$1 to \$3, like a pair of shoes. He illustrates that economies of scale cause manageable impacts. Regarding education, Mr. Borromeo points out the importance of a STEM-based curriculum for maritime professionals. “Reskilling the current workforce and preparing future generations is important,” with long lead times for educational reform and technology adoption becoming longer. Mr. Borromeo proposes immediate actions, including the adoption of the Energy Efficiency Index (EEI) and optimizing ship handling to reduce fuel consumption by 10 percent without changing fuels.

2. What steps is MARINA taking to align the Philippines with the IMO’s GHG reduction strategy?

Luisito delos Santos

Mr. Delos Santos discussed how MARINA focuses on integrating maritime concerns into the National Action Plan for Climate Change, which currently prioritizes land-based emissions. He also discusses the impact of this prioritization on domestic shipping. Domestic fleets, primarily

convention-sized ships, face significant challenges, including retrofitting costs and compliance with international regulations. Mr. delos Santos stated, “Retrofitting a ship requires a lot of capital,” necessitating government support mechanisms. With no established alternative fuel supply, he emphasized the importance of “upskilling and reskilling seafarers to meet new demands.” Training requirements will evolve depending on the adoption of fuels like ammonia or nitrogen. He then stressed that congressional action is crucial for providing financial stability and policy frameworks to mitigate the economic impact on the maritime sector.

3. What steps is MARINA taking to align the Philippines with the IMO’s GHG reduction strategy?

Captain Lino Paderanga

Captain Paderanga discussed how AIMS aligns its curricula with MARINA’s guidelines and international standards, integrating sustainability and green shipping topics. He said, “MARINA is constantly inspecting schools regarding the academe and facilities,” ensuring compliance with the STCW 2010 amendments. AIMS is committed to adopting emerging technologies and preparing students for future industry demands. Furthermore, AIMS is proactive in equipping the next generation of maritime professionals with skills for handling advanced technologies and sustainable practices.

4. How would the proposed Blue Economy Act impact the maritime industry, and what legislative reforms are most needed?

Jan Krianne Pineda

Ms. Pineda addressed the question from the perspective of blue bonds and their influence on environmental standards. She noted, “Investment schemes now increasingly evaluate environmental metrics,” referencing recent SEC guidelines for blue bonds. These include adopting third-party certifications such as the Marine Stewardship Council (MSC) certification. The inclusion of sustainability standards in investment metrics would prompt companies to revise their supply chains to align with environmental requirements. She highlighted that trends that are aware of the importance of sustainability influence how markets operate. This creates opportunities for those who adapt quickly.

Luisito delos Santos

Mr. delos Santos emphasized that MARINA strongly backs the proposed Blue Economy Act, calling it “very, very important for the Philippine maritime industry.” He outlined critical reforms, including increased funding and support to revitalize the country’s historic shipbuilding industry. He lamented that “we buy patrol and naval ships abroad” instead of fostering local production. He also called the current system “outdated and obsolete.” He stressed the need for transitioning to modern practices, such as adopting a tonnage tax. He urged the creation of a unified agenda integrating the aspirations of a maritime nation, covering areas like shipbuilding, ship registry, and national security.

Gerardo Borrromeo

Mr. Borrromeo admitted that he is not familiar with the Blue Economy Act’s details but welcomed its intent, saying, “It stands to reason that we should take advantage of the blue economy as an archipelagic nation.” He highlighted key areas for exploration under the blue economy framework, including food production, tourism, mineral extraction, ship repair, and registry. Referring to a paper by former Secretary Pernia, he stressed the potential for the blue economy to increase its GDP contribution from 5 percent to 15 percent or 20 percent, but he cautioned that significant financing and partnerships are required. He connected the blue economy to national security, emphasizing the need to leverage the country’s maritime resources to ensure strategic importance in global geopolitics. Mr. Borrromeo underscored the necessity of industry-academic collaboration and private-public partnerships, stating that they “are critical to crafting laws that attract investors and enable faster progress.”

5. How have geopolitical tensions in the West Philippine Sea affected the fisheries sector, and what strategies are in place to enhance port development and maritime security?

Jan Krianne Pineda

Ms. Pineda discussed the impact of fisheries in Mindoro Strait. She explained that fishing activities in the Mindoro Strait are limited to within 15 kilometers of the shoreline, minimizing direct exposure to tensions in the West Philippine Sea. She stated, “Thankfully, none of our fishers

have reported any assaults.” Local fisher federations actively monitor the situation, with support from local government units and the Coast Guard. Coordination with processors and traders helps ensure a secure supply chain, although formal collaborations on maritime law enforcement remain limited.

Luisito de los Santos

Mr. de los Santos raised concerns about the potential escalation of tensions, asking, “Are we ready to protect Filipino seafarers and Philippine-flagged ships passing through that area?” He emphasized the need for mechanisms to ensure maritime security, drawing parallels with government evacuation plans for land-based workers in conflict zones.

Gerardo Borromeo

Regarding tracking and surveillance, Mr. Borromeo advocated for the implementation of vessel trackers (AIS) to improve monitoring and response capabilities. He acknowledged cost challenges but stressed that such systems are essential in maritime security. Bringing the discussion back to broader maritime goals, Mr. Borromeo called for unified efforts to enhance the industry’s potential, stating, “Government alone can’t do it. The private sector alone can’t do it.” He urged stakeholders to support public hearings, trade associations, and other forums to prioritize maritime concerns.

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Established in 1985 by University of the Philippines (UP) President Edgardo J. Angara, the UP Center for Integrative and Development Studies (UP CIDS) is the policy research unit of the University that connects disciplines and scholars across the several units of the UP System. It is mandated to encourage collaborative and rigorous research addressing issues of national significance by supporting scholars and securing funding, enabling them to produce outputs and recommendations for public policy.

The UP CIDS currently has twelve research programs that are clustered under the areas of education and capacity building, development, and social, political, and cultural studies. It publishes policy briefs, monographs, webinar/conference/forum proceedings, and the Philippine Journal for Public Policy, all of which can be downloaded free from the UP CIDS website.

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UNIVERSITY OF THE PHILIPPINES
CENTER FOR INTEGRATIVE AND DEVELOPMENT STUDIES

Lower Ground Floor, Ang Bahay ng Alumni, Magsaysay Avenue
University of the Philippines Diliman, Quezon City 1101

Telephone (02) 8981-8500 loc. 4266 to 4268
(02) 8426-0955

Email cids@up.edu.ph
cidspublications@up.edu.ph

Website cids.up.edu.ph