

**REVIEW OF THE
PHILIPPINE NATIONAL TUNA INDUSTRY COUNCIL
(NTIC)**

**West Pacific East Asia Oceanic Fisheries Management Project
(WPEA-OFMP)**

May 2012

Prepared by
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RATIONALE

The outset of new management regimes involving both the way that the fisheries resources are exploited, as well as the regulations affecting food safety and standards, pushed the Philippine tuna industry and the government to pull their acts together, and agreed to form a tuna council, and on November 6, 2000, then Department of Agriculture Secretary Edgardo J. Angara issued Special Order No. 659, forming the National Tuna Industry Council (NTIC).

It was organized to serve as the overall coordinating body to oversee the development of the tuna industry, formulate strategic action plan for its development consistent with relevant laws, regional and international agreements, either bilaterally or multilaterally where the Philippines is a signatory, in terms of access and trade relations. It is also mandated to conduct periodic review of said policies and regulations consistent with scientific and economic considerations, and recommend improvements, when necessary, to ensure sustainability of the fisheries resources, as well as promoting its competitiveness.

There is a general feeling among some industry players that somehow, NTIC has not performed up to their expectations. Its composition and representations have not been enough, or to say the least, have not exactly represented some important sectors in the industry.

Then, here comes the new regulations and management measures imposed by the Western and Central Pacific Fisheries Commission (WCPFC), and most often than not, the Philippines, through its fisheries agency, the Bureau of Fisheries and Aquatic Resources (BFAR), is left with almost no choice but to follow and implement them in its own waters. Along this process, it is important and crucial that proper consultations with all sectors, primarily those operating in the Philippine waters, taking into consideration the impact and participation of said sectors if the goal is eventually for the sake of the thousands of families fully dependent on this industry.

It is on this premise that a review of the functions and activities, as well as representations and composition of the NTIC, is necessary, and that corresponding recommendations beneficial for the good all, or at the least, majority of the stakeholders, has to be taken into serious consideration, responding to the need of the hour.

PROJECT OBJECTIVE

It is the main goal of this review process to come up with doable recommendations so as to make the NTIC more responsive and proactive to the needs and issues of the Philippine Tuna Industry, with the end view of attaining sustainable development and promoting competitiveness.

METHODOLOGIES

PROCESS	APPROACH AND/OR RESULT
○ Secondary Data Gathering & Analysis	○ Review of Secondary Data
○ Key Informants' Interview	○ Generate information through email from respondents outside of General Santos City ○ Conduct actual interview for respondents within General Santos City
○ Review Workshops	○ Coordinate conduct of workshops ○ Present initial consolidated results, with recommendations
○ Submission of Final Report	○ Final Report

RESULTS & DISCUSSIONS

- 1. MAIN FUNCTION:** *Act as overall coordinating body to oversee the development of the tuna fisheries industry in the country-*

GUIDE QUESTION/S	○ Do you think the legal instrument creating the NTIC is sufficient enough to perform its mandate? Or is a higher mandate necessary?
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GAPS, ISSUES & CONCERNS

○

RECOMMENDED AREAS OF IMPROVEMENT

- It is the consensus among the majority industry players that a higher mandate, preferably under the Office of the President, through an Executive Order (EO), is imperative. This way, other government agencies will be “compelled” to actively participate, and through a broadened reach by the NTIC will accrue towards faster and better interventions;
- Specifically, it is suggested that the NTIC should ideally be led by Malacanang, maybe by the Executive Secretary, and be re-created thru an Executive Order (EO);
- It is also suggested that there is a strong need to formalize and strengthen the NTIC with a strong secretariat base, which can be led by the Bureau of Fisheries and Aquatic Resources, and if need be, representatives from other sectors and government agencies.

2. SPECIFIC FUNCTION # 1: Formulate a **Strategic Action Plan** for the **development of the tuna industry** consistent with the AFMA and the Fisheries Code of 1998, and other relevant laws. Such plan should include **regional and international agreements** for the sustainable development of the tuna industry-

GUIDE QUESTION/S

- Is there a Strategic Tuna Industry Development Action Plan that are being followed and/or adjusted based on current issues & concerns?
- How did the Regional & International Agreements affect your particular sector?

GAPS, ISSUES & CONCERNS

- No strategic plan (*there was a draft in the late 90s*) – only on bilateral agreements. So suffice to say that there is no current strategic plan, and as such, all actions and interventions at the national level are done on a piecemeal basis;
- Most of discussions at the NTIC have been reactions to new developments in the industry, instead of it being proactive and plan ahead of time.

RECOMMENDED AREAS OF IMPROVEMENT

- It is highly suggested to formulate a Strategic Action Plan. This can be done by conducting a diagnostic analysis of the local Philippine tuna industry, including an updated /present profile (*e.g., Strengths-Weaknesses-Opportunities-Threats (SWOT) & Value Chain Analysis*) is important so that the new management regimes will be incorporated in order to have a more responsive Strategic Action Plan.

3. SPECIFIC FUNCTION # 2: Review and recommend **policies affecting the industry** including those that affect **bilateral and multilateral fishing relations**, as well as those that will promote **sustainability**-

GUIDE QUESTION/S

- What bilateral and multilateral fishing relations do you know have been established? How do these fishing relations affect your sector?

GAPS, ISSUES & CONCERNS

- No real fisheries access agreements since the expiration of the Indonesia pact. There are only conservation measures. While these are valuable, they do not address the problems facing the present fishing fleet. The only existing fisheries agreements are those with Papua New Guinea, Timor Leste and Brunei Darussalam. Except for PNG, the rest are non-functional since there are no takers from the industry. These are merely bilateral agreements between the governments of both countries, but there are no real investments or fishing operations that are currently operational.

RECOMMENDED AREAS OF IMPROVEMENT

- Need to establish or re-visit fishing access agreement with Palau and Indonesia – being our nearest neighbours – with Indonesia among the most productive fishing grounds, and Palau as entry to the rest of the Pacific countries;
- Need to review or identify current effort, both within the Philippines and in waters where we have access arrangements. Work within them and find ways to protect the whole industry. Encourage and provide avenue for the various sectors to participate in the NTIC so that they can live up with sustainable issues and measures being discussed and implemented;
- Recommend policies to improve and strengthen Philippine position in all current & future bilateral & multilateral arrangements;
- Encourage a more active involvement of the industry so that they can live up with sustainable issues & measures being discussed & implemented.

4. SPECIFIC FUNCTION # 3: Review and recommend policies affecting trade relations including those that will affect the competitiveness of the industry-

GUIDE QUESTION/S

- As far as you know, what trade relation policies promoting the Philippine tuna industry’s competitiveness have been implemented? What had been your participation?

GAPS, ISSUES & CONCERNS

- Limited market access information and support for all sectors of tuna (*i.e., fresh, frozen, processed and canned*);
- There are no current significant trade relation policies promoting the Philippine tuna industry that is existing;
- Import duties, especially in the EU, are very high;
- Inadequate support of some government agencies for the competitiveness of Philippine products.

RECOMMENDED AREAS OF IMPROVEMENT

- Access to trade-related data for policy review purposes;
- There should be a concerted effort involving the Department of Trade and Industry (DTI), Department of Foreign Affairs (DFA), Department of Agriculture (DA), and the tuna industry to develop a strategy and action plan to rationalize tariff levels;
- Develop other export markets;

- Industry to work closely with concerned government agencies on access to the international market;
- Work to promote PHILIPPINE BRAND;
- More proactive work in improving & promoting PHILIPPINE TUNA products;
- Incorporate tuna in WTO negotiations (e.g., General Rules, Subsidy, etc.)

5. SPECIFIC FUNCTION # 4: Call on any government agency or academe such as the DTI, NEDA, DFA, and the UP, to assist in the formulation of the strategic action plan and review of policies and implementation of projects and programs-

GUIDE QUESTION/S

- Is the lobbying effort in order to advance the industry's/ country's interests sufficient? If not, do you have particular suggestion?
- Who is doing serious research works / scientific studies at the local and national level? At regional and international level? What improvements can you suggest?

GAPS, ISSUES & CONCERNS

- Lack of scientists;
- Lack of scientific data/studies;
- While the Bureau of Fisheries & Aquatic Resources (BFAR) has done a serious work on improving its fisheries data collection, it has never been enough.

RECOMMENDED AREAS OF IMPROVEMENT

- Encourage involvement of scientists/ academe- identify & collaborate with Filipino fisheries scientists;
- Strong science support- work in collaboration with other countries, RFMOs & other development partners: (a) local & national levels, and (b) regional & international levels;
- Work with BFAR, PCAARRD & BAR to support the implementation of tuna R&D roadmap;
- Primary research need- define sub-populations of Philippine area BET, YFT, SKJ, other pelagics – *ongoing*.

6. SPECIFIC FUNCTION # 5: Coordinate with private and public entities to be affected by the action plan-

GUIDE QUESTION/S

- Had there been sufficient consultation & coordination done with your sector?

GAPS, ISSUES & CONCERNS

- Participation is very limited, mostly Navotas & Gen San;
- Limited positive effect on national policies & actions.

RECOMMENDED AREAS OF IMPROVEMENT

- Identify all players & encourage wider participation- thus need to strengthen NTIC so other players will see the benefits in participating.

7. SPECIFIC FUNCTION # 6: Recommend government programs and projects that will benefit the industry-

GUIDE QUESTION/S

- What government programs and projects beneficial to the industry, as a result of NTIC recommendations, have been implemented?

GAPS, ISSUES & CONCERNS

- Lack of a workable program meant to increase awareness & participation of stakeholders.

RECOMMENDED AREAS OF IMPROVEMENT

- Establish centralized data / information storage under a permanent secretariat from regional meetings (*e.g., RFMO meetings, etc.*) & transform them to clear & doable messages that will increase awareness of players.

8. SPECIFIC FUNCTION # 7: Establish an integrative and consultative structure for inter-agency and intersectional collaboration-

GUIDE QUESTION/S

- Was there sufficient consultation and collaboration with all concerned sectors?
- Were agreements, as results of the consultation processes, have been followed and/or implemented?

GAPS, ISSUES & CONCERNS

- Poor participation of some government agencies, whose role may be limited but very significant;
- Limited implementation of agreements.

RECOMMENDED AREAS OF IMPROVEMENT

- Continuous, regular & consistent members;
- Encourage active participation of locally-based companies.

9. COMPOSITION/ REPRESENTATION

- | | |
|-------------------------|---|
| GUIDE QUESTION/S | ○ Is your sector fully represented? Are your particular concerns addressed? What improvements / changes do you suggest? |
|-------------------------|---|

GAPS, ISSUES & CONCERNS

- The NTIC is perceived to be more responsive to the interests of big companies.

RECOMMENDED AREAS OF IMPROVEMENT

- Broaden reach of NTIC- *include other agencies*;
- Increase private sector representation- from all geographical sectors;
- Rotational chairmanship of NTIC;
- Representation should be top-heavy for small/medium seiners & pumpboats;
- Cannery need to take a more active role;
- Schedule meetings far in advance of crucial deadlines (*e.g., upcoming WCPFC meetings, etc.*).

OTHER OBSERVATIONS/ RECOMMENDATIONS

- The structure of the NTIC is solid behind tuna catchers or tuna fishing, not so much on processing or canning;
- Approach on a much broader perception of tuna as an industry – both upstream and downstream. **Upstream concerns** – focus on production, and **downstream concerns** – will involve activities of commercialization (i.e., sales of tuna in various forms: fresh, processed, canned);
- Filipino investors are setting up elsewhere in order to keep their businesses viable, resulting in a loss of credit to the Philippines, and as such, sales are recorded as exports of other countries. A re-focus on exportable tuna from the Philippines might now be in order regardless of where the tuna comes from. Focus is all on producers. It is the cannery, processors, or exporters that make the mark in the world market, not local catch;
- Options to EO:

- Joint-Memorandum Circular between DA and other Line Agencies stipulated in the SO in order to have clearly approved parameters on the tasks and functions of concerned agencies
- Congressional enactment through legislation – long term & harder

- Need to consider distinct fishery management interventions for each of the fishing grounds:
 - Sulu-Celebes Sea
 - Moro Gulf
 - Eastern Philippine Sea
 - Other Philippine tuna fishing grounds

- Philippines membership to the Western & Central Pacific Fisheries Commission (WCPFC) seems to be a disadvantage. NTIC to review Philippine membership to the WCPFC;

- Need for solid Philippine scientific studies – as basis for policy & management decisions;

- Develop local technical capacity, matching that of the WCPFC TWGs/Committees on research & lobbying (with science as the base); the new NTIC should also have the following two (2) committees to be aligned with the structure and workings of the WCPFC:
 - Science Committee (SC)
 - Technical & Compliance Committee (TCC)

- Cost-sharing among industry sectors – to fund scientific research & lobbying (i.e., purse seine, ring net, handline, canneries, fresh frozen exporters & processors);

- Export tax collection – devoted and/or allocation to flow back for scientific research on tuna & market intelligence;

- Limited BFAR/ NFRDI research personnel, thus: NTIC to identify / commission Research Team to be funded from shared costs between the government and private sector;

- Research Team of NTIC should be permanent;

- Involve local capabilities to do research (e.g., MSU College of Fisheries, etc.);

- NTIC to help facilitate for tax / duties exemption – provided under RA 8550/ AFMA?;

- NTIC to recommend to the DA Secretary, elevating the former's mandate; DA to

support and endorsement to the Office of the President – for issuance of EO;

- May propose to the DA Secretary to partly shoulder the costs of travelling expenses of the NTIC Members.

ANNEXES

ANNEX A

CREATION OF A NATIONAL TUNA INDUSTRY COUNCIL (NTIC)

Special Order, No. 659, Series of 2000

Date Issued: 6 November 2000

Signed: Hon. Edgardo J. Angara, Secretary-Department of Agriculture

Subject: Creation of a National Tuna Industry Council

In view of the need to address the crisis affecting the Philippine Tuna Industry that undermines its potential as a major contributor to the national economy, a National Tuna Industry Council is hereby constituted to act as overall coordinating body to oversee the development of the tuna fisheries industry in the country. In particular, it shall have the following functions:

- a) Formulate a Strategic Action Plan for the development of the tuna industry consistent with the AFMA and the Fisheries Code of 1998, and other relevant laws. Such plan should include regional and international agreements for the sustainable development of the tuna industry;
- b) Review and recommend policies affecting the industry including those that affect bilateral and multilateral fishing relations, as well as those that will promote sustainability;
- c) Review and recommend policies affecting trade relations including those that will affect the competitiveness of the industry;
- d) Call on any government agency or academe such as the Department of Trade & Industry (DTI), National Economic Development Authority (NEDA), Department of Foreign Affairs (DFA), and the University of the Philippines (UP), to assist in the formulation of the strategic action plan and review of policies and implementation of projects and programs;
- e) Coordinate with private and public entities to be affected by the action plan;
- f) Recommend government programs and projects that will benefit the industry; and
- g) Establish an integrative and consultative structure for inter-agency and intersectional collaboration.

The Council shall be composed of the following:

Department of Agriculture (DA)

Bureau of Fisheries & Aquatic Resources (BFAR)

Philippine Fisheries Development Authority (PFDA)

Five (5) Representatives from the Fishing or Producing Sector: Four (4) from the purse-seining; One (1) from the handline operations

Five (5) Representatives from the Processing: Four (4) from the canning; One (1) from the fish frozen processing sector

Members from the private sectors of the tuna industry shall be recommended by their respective sectors or confederation, who shall be appointed by the Secretary for a two-year term. The Council shall be chaired by the Undersecretary for Fisheries of the Department of Agriculture. A representative from the private sector shall act as Co-Chairman.

The Council may create Technical Working Groups may be necessary in the discharge of its functions. The DA-BFAR shall provide technical and secretariat support to the Council and the TWGs.

This Special Order shall take effect immediately.

ANNEX B

LIST OF CURRENT NATIONAL TUNA INDUSTRY COUNCIL (NTIC) MEMBERS

**available data from NFRDI*

GOVERNMENT SECTOR:

Bureau of Fisheries and Aquatic Resources (BFAR)

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Philippine Fisheries Development Authority (PFDA)

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National Economic Development Authority (NEDA)

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PRIVATE SECTOR, NGO & ACADEME REPRESENTATIVES:

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President

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ANNEX C

LIST OF TUNA & RELATED ORGANIZATIONS IN THE PHILIPPINES

I. **SOCKSARGEN FEDERATION OF FISHING & ALLIED INDUSTRIES, INC. (SFFAI) – General Santos City**

The **SOCKSARGEN Federation of Fishing and Allied Industries, Incorporated (SFFAI)** was organized as a non-stock, non-profit organization based in General Santos City, Philippines. As an umbrella organization, its membership base is composed of seven (7) independent organizations involved in fishing, tuna canning, processing and aquaculture, to wit:

1. **Southern Philippines Boat Owners & Tuna Association (SPBOTA)** – composed of large commercial fishing companies that are operating fishing vessels above 250 gross ton carrying capacity;
2. **South Cotabato Purse Seiners Association (SOCOPA)** – consists fishing companies that operate group purse seine fishing vessels with carrying capacities of about 20 to 150 gross tons;
3. **Umbrella Fish Landing Association (UFLA)** – although its main membership consist of small and medium purse seine and ring net operators, it likewise includes those engaged in fish trading, such as fish vendors, scalers and buyers. This group supplies the domestic market requirements for tuna, reef fishes and small pelagic fisheries;
4. **Tuna Cooperative of General Santos (TUNA COOP)** – is operating pumpboats using hook and line to catch large tuna. It is a sustainable technology and very selective – one man, one hook, one line, one fish at a time;
5. **Tuna Cannery Association of General Santos (TCAGS)** – this is a local chapter of the Tuna Cannery Association of the Philippines (TCAP) comprised of all the six (6) tuna canneries in General Santos City;
6. **Fresh Frozen Seafood Association of the Philippine, Inc. (FFSAPI)** – comprises the exporters and processors of fresh and frozen tuna and high-value tuna products. It aims to develop common quality standards and marketing for processed seafoods;
7. Though not into tuna business, the **Chamber of Aquaculture and Ancillary Industries in Sarangani, Inc. (CHAINS, Inc.)** – is a significant member of SFFAI producing and processing high value aquaculture fisheries. Its membership

includes fishpond operators and owners of ancillary industries such as ice plant and cold storage facilities particularly in Sarangani Province.

Objectives:

1. Unite the fishing associations and allied industries in SOCSKSARGEN to attain a sustainable and globally competitive industry;
2. Serve as the voice of the fishing industry;
3. Provide a neutral venue for its members to raise specific problems and resolve fundamental issues; and
4. Serve as a forum to strengthen industry competitiveness.

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President: MR. JOAQUIN T. LU
Executive Director: MS. ROSANNA BERNADETTE CONTRERAS

II. ALLIANCE OF PHILIPPINE FISHING FEDERATIONS, INC. (APFFI) – Navotas, Metro Manila

The ALLIANCE OF PHILIPPINE FISHING FEDERATIONS, INC. (APFFI) is non-government organization which boasts of a different and large membership involved in fishing industry and socio-economic development of the country. It aims to foster a comprehensive knowledge and contribution as an institution in nation building and serves as the center of information.

Presently, it has six (6) regional federations with (8) cities and (20) municipal association members. It shall link with the fisherfolk serviced by its municipal associations.

Vision

It looks forward as a dynamic and progressive organization, devoted to the principles of unity, development, justice and peace for the fishing industry of our nation.

It aims to:

1. Engage its membership organically, interrelated and working together in service of the fisherfolks;
2. A better working relationship with all government agencies and Non Government Organizations (NGOs);
3. Actively participate in promoting the coastal resource management, fishing industry and its development.

Objectives:

1. To promote broader public understanding on the nature of the ALLIANCE as an institution of nation building;
2. To foster camaraderie, coordination and cooperation among members federations for optimum impact using available resources;
3. To serve as a lobby group on key issues raised by its members ;
4. To serve as a center of information, education, and communication on fishing industry.

Programs

1. Program/Project Development

Become a major endorser/ consolidator of several funding agencies. It will assist in the development of project proposals as well as monitoring and evaluating projects. Among these are:

- **Fisherfolk Settlement Areas.** Shall endorse fisherfolk settlement areas in coordination with concerned agencies of the government;
- **Municipal Fisheries Grant Fund.** Shall endorse project proposals of member-municipal fisherfolk associations for the development, management and conservation of the municipal resources for the upliftment of its members;
- **Fishing Vessel Development Fund.** Shall endorse /consolidate the building / acquisition of fishing vessels under a long term loan agreement between the Philippine government and other country/ies to be administered by the Development Bank of the Philippines (DBP) / Land Bank of the Philippines (LBP).

2. Accreditation

In order to attain the highest degree of credibility and acceptance to the members served, all member-Federation will be assessed periodically by the Membership Committee of the ALLIANCE.

The member-Federations are guided by the Principles of Cooperation, thus shall abide by the principles of these documents.

3. Capability Building

In cooperation with other Non Government Organizations and Government Agencies, it will institutionalize training programs that will provide the necessary inputs to increase skills and strengthen the management capability of its member-Federations. It shall launch and pursue a nationwide educational campaign:

- To help realize the policies and implement the provision of RA 8550 and its IRR ;
- To promote the development, management, conservation and proper use of coastal resources;
- To promote the principle of sustainable development; and
- To promote the development of truly Filipino oriented fishing and ancillary industries.

4. Information Exchange

As a center of information, it will gather and disseminate information needed by the member-Federations through its monthly newsletter.

5. Lobbying

It will act as spokesperson for its membership regarding issues affecting them and the fishing industry. Example of these was the lobby work in the molding of RA 8550 and its IRR, and also the Tariff Exemption in the IRR of the Agriculture and Fisheries Modernization Act of 1997.

6. NGO-GO Collaboration

As partners in nation building, it will maintain a working relationship with various government agencies especially the DA-BFAR. It will initiate programs and projects to unify efforts with the government in a common goal for national development.

Membership Criteria

Any Fishing Federation can join the ALLIANCE as long as it is committed to people's empowerment, people's participation, autonomous people's organization, political pluralism, structural change through non violent action, open and honest relations with partner agencies in the service of the people.

All members should subscribe to the above mentioned principles, however, membership is by invitation. They must have trust which devotes a substantial

portion of their income to social, educational, and other services serving the common welfare. They must have an operation geared towards fulfilment of its stated mission and goal.

It is composed of set of National Officers & a Technical Working Group.

Contact Details:

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Secretary General

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III. INTER ISLAND DEEP SEA FISHING ASSOCIATION (IDSFA)

The Inter-Island Deep Sea Fishing Association (IDSFA) is a duly registered organization of fishing boat operators based in Navotas, Metro Manila. It is currently composed of 19 regular members and 8 associate members.

Its main purpose is **“To bring and form into a solid union all owners of fishing boats engage actively in deep sea fishing , in order to have more power and strength in the presentation of their common cause and protection, rights and privileges when unduly transgressed upon by any person whatsoever “.**

The other purposes of the Association are:

1. Promote friendly competition among members ;
2. Disseminate to members new technology, trends and other developments in the industry and contribute to the upliftment and upgrading of the skills of fishermen;
3. Coordinate with government agencies concerned on policies, rules and regulations affecting the fishing industry;
4. Inform government agencies concerned with fisheries of suggestions on issues, comments and views of the members of the Association affecting the industry.

To attain the above, it is the Associations standing policy to maintain harmony and goodwill with the government and the private sector. This is done through fellowship and continuous dialogue.

Contact Details:

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ANNEX D

REVIEW WORKSHOP PICTURES

21 November 2011, Sydney Hotel, General Santos City



ANNEX E

INPUT TO THE REVIEW WORKSHOP

(INITIAL RESULT OF SECONDARY DATA ANALYSIS & KEY INFORMANTS' INTERVIEW)

21 November 2011, Sydney Hotel, General Santos City



NATIONAL TUNA INDUSTRY COUNCIL (NTIC): A REVIEW

Revised: 29 May 2012
Quezon City, Philippines



The Project

Objective:

- Make NTIC more responsive and proactive to the needs and issues of the Philippine Tuna Industry, with the end in view of attaining sustainable development and promoting competitiveness**

Background

SUBJECT: Creation of a National Tuna Industry Council

6 November 2000

Special Order
No. 659
Series of 2000


EDGARDO J. ANGARA
Secretary

Main Function:

Act as overall coordinating body to oversee the development of the tuna fisheries industry in the country

Specific Functions

- ❑ **Formulate a Strategic Action Plan** for the sustainable development of the tuna industry, consistent with:
 - ✓ AFMA, RA 8550, other relevant laws
 - ✓ regional and international agreements

- ❑ **Review and recommend policies** affecting the industry, to include-
 - ✓ bilateral & multilateral fishing & trade relations
 - ✓ sustainability
 - ✓ competitiveness



Specific Functions

- ❑ **Call** on any government agency or academe (i.e., DTI, NEDA, DFA & UP) to assist in:
 - ✓ formulation of strategic action plan
 - ✓ review of policies
 - ✓ implementation of projects & programs
- ❑ **Coordinate** with private & public entities to be affected by the action plan
- ❑ **Recommend government programs & projects** that will benefit the industry
- ❑ **Establish an integrative and consultative structure** for inter-agency and intersectional collaboration



Composition

Chairman: DA USec for Fisheries

Co-Chairman: Representative from the Private Sector (*recommended by industry sector or confederation*)

Terms & Appointments

- ❑ **Two (2)-year term-** appointed by DA Secretary
- ❑ May create **TWGs**
- ❑ DA-BFAR as **Secretariat**

Composition

Permanent: (13)

- Department of Agriculture (DA)
- Bureau of Fisheries & Aquatic Resources (BFAR)
- Philippine Fisheries Development Authority (PFDA)
- Five (5) Representatives from the Fishing or Producing Sector
 - ✓ Four (4) purse seiners
 - ✓ One (1) handliner
- Five (5) Representatives from the Processing Sector
 - ✓ Four (4) canners
 - ✓ One (1) fresh frozen processor

Composition

Intermittent/ as needed: (4) +

- Department of Trade & Industry (DTI)
- National Economic Development Authority (NEDA)
- Department of Foreign Affairs (DFA)
- University of the Philippines (UP)
- Others (as may be determined)

The Result

GAPS/ISSUES & CONCERNS	RECOMMENDED AREAS OF IMPROVEMENT
<p>Main Function: Act as overall coordinating body to oversee the development of the tuna fisheries industry in the country-</p>	
	<ul style="list-style-type: none"> ○ Formalize & strengthen NTIC thru an EO- with regular budget & strong secretariat, even <i>if attached basis only</i> ○ Re-create thru an Executive Order (EO)- IMPERATIVE

The Result

GAPS/ISSUES & CONCERNS	RECOMMENDED AREAS OF IMPROVEMENT
<p>Specific Function: Formulate a Strategic Action Plan for the development of the tuna industry consistent with the AFMA and the Fisheries Code of 1998, and other relevant laws. Such plan should include regional and international agreements for the sustainable development of the tuna industry-</p>	
<ul style="list-style-type: none"> ○ No strategic plan (there was a draft in the late 90s) – only on bilateral agreements ○ All actions are piecemeal ○ Most of the discussions were reactions to new development in the industry 	<ul style="list-style-type: none"> ○ Formulate a Strategic Action Plan (can be part of the proposed workshop) - <i>incorporate current situations</i> ○ Conduct a diagnostic analysis of the local tuna industry situation (e.g., SWOT, Value Chain)- important in the development of a very responsive Strategic Action Plan

The Result

GAPS/ISSUES & CONCERNS	RECOMMENDED AREAS OF IMPROVEMENT
<p>Specific Function: Review and recommend policies affecting the industry including those that affect bilateral and multilateral fishing relations, as well as those that will promote sustainability-</p>	
<ul style="list-style-type: none"> ○ No real fisheries access agreements since expiration of Indonesia pact. There are only conservation measures. While these are valuable, they do not address the problems facing the present fleet. <i>Existing: PNG, Timor Leste, Brunei Darussalam</i> 	<ul style="list-style-type: none"> ○ Review / identify current effort- both within Philippine waters & in waters where we have access arrangements ○ Recommend policies to improve and strengthen Philippine position in all current & future bilateral & multilateral arrangements ○ Encourage a more active involvement of the industry so that they can live up with sustainable issues & measures being discussed & implemented

The Result

GAPS/ISSUES & CONCERNS	RECOMMENDED AREAS OF IMPROVEMENT
<p>Specific Function: Review and recommend policies affecting trade relations including those that will affect the competitiveness of the industry-</p>	
<ul style="list-style-type: none"> ○ Limited market access information for all sectors of tuna ○ High EU import duties 	<ul style="list-style-type: none"> ○ Access to trade-related data for policy review purposes ○ Work with DTI, DFA & DA to develop strategy & action plan to rationalize tariff level ○ Continue to develop additional markets

The Result

GAPS/ISSUES & CONCERNS	RECOMMENDED AREAS OF IMPROVEMENT
<p>Specific Function: Review and recommend <u>policies affecting trade relations</u> including those that will affect the <u>competitiveness</u> of the industry-</p>	
<ul style="list-style-type: none"> ○ Inadequate support of some government agencies for the competitiveness of Philippine products 	<ul style="list-style-type: none"> ○ Industry to work closely with concerned government agencies on access to the international market ○ Work to promote PHILIPPINE BRAND ○ More proactive work in improving & promoting PHILIPPINE TUNA products ○ Incorporate tuna in WTO negotiations (e.g., General Rules, Subsidy, etc.)

The Result

GAPS/ISSUES & CONCERNS	RECOMMENDED AREAS OF IMPROVEMENT
<p>Specific Function: Call on any government agency or academe such as the DTI, NEDA, DFA, and the UP, to assist in the formulation of the strategic action plan and <u>review of policies and implementation of projects and programs-</u></p>	
<ul style="list-style-type: none"> ○ Lack of scientists ○ Lack of scientific data/studies 	<ul style="list-style-type: none"> ○ Encourage involvement of scientists/ academe- identify & collaborate with Filipino fisheries scientists ○ Strong science support- work in collaboration with other countries, RFMOs & other development partners: (a) local & national levels, and (b) regional & international levels

The Result

GAPS/ISSUES & CONCERNS	RECOMMENDED AREAS OF IMPROVEMENT
<p>Specific Function: <i>Call on any government agency or academe such as the DTI, NEDA, DFA, and the UP, to assist in the formulation of the strategic action plan and <u>review of policies and implementation of projects and programs-</u></i></p>	
	<ul style="list-style-type: none"> ○ Work with BFAR, PCAARRD & BAR to support the implementation of tuna R&D roadmap ○ Primary research need- define sub-populations of Philippine area BET, YFT, SKJ, other pelagics - <i>ongoing</i>

The Result

GAPS/ISSUES & CONCERNS	RECOMMENDED AREAS OF IMPROVEMENT
<p>Specific Function: <i>Coordinate with <u>private and public entities</u> to be <u>affected by the action plan-</u></i></p>	
<ul style="list-style-type: none"> ○ Participation is very limited, mostly Navotas & Gen San ○ Limited positive effect on national policies & actions 	<ul style="list-style-type: none"> ○ Identify all players & encourage wider participation- thus need to strengthen NTIC so other players will see the benefits in participating

The Result

GAPS/ISSUES & CONCERNS	RECOMMENDED AREAS OF IMPROVEMENT
<p>Specific Function: Recommend government programs and projects that will benefit the industry-</p>	
<ul style="list-style-type: none"> ○ Lack of a workable program meant to increase awareness & participation of stakeholders 	<ul style="list-style-type: none"> ○ Establish centralized data / information storage under a permanent secretariat from regional meetings (e.g., RFMO meetings, etc.) & transform them to clear & doable messages that will increase awareness of players

The Result

GAPS/ISSUES & CONCERNS	RECOMMENDED AREAS OF IMPROVEMENT
<p>Specific Function: Establish an integrative and consultative structure for inter-agency and intersectoral collaboration-</p>	
<ul style="list-style-type: none"> ○ Poor participation of some government agencies, whose role may be limited but very significant ○ Limited implementation of agreements 	<ul style="list-style-type: none"> ○ Continuous, regular & consistent members ○ Encourage active participation of locally-based companies

The Result

GAPS/ISSUES & CONCERNS	RECOMMENDED AREAS OF IMPROVEMENT
Composition	
<ul style="list-style-type: none"> ○ The NTIC is perceived to be more responsive to the interests of big companies 	<ul style="list-style-type: none"> ○ Broaden reach of NTIC- <i>include other agencies</i> ○ Increase private sector representation- from all geographical sectors ○ Rotational chairmanship of NTIC ○ Representation should be top-heavy for small/medium seiners & pumpboats ○ Cannery need to take a more active role ○ Schedule meetings far in advance of crucial deadlines (e.g., <i>upcoming WCPFC meetings, etc.</i>)

Other Observations/ Recommendations

- ❑ **Structure- solid behind tuna catchers or tuna fishing, not so much on processing or canning**
- ❑ **The industry better could be served better if approached on a broader perception of tuna as an industry-**
 - ✓ Upstream: production
 - ✓ Downstream: activities of commercialization (i.e., *sales of tuna in various forms: fresh, processed, canned*)

Other Observations/ Recommendations

- ❑ **Filipino investors are setting up elsewhere in order to keep their businesses viable, resulting in a loss of credit to the Philippines, as such sales are recorded as exports of other countries**
- ❑ **A re-focus on exportable tuna from the Philippines might now be in order regardless of where the tuna comes from**
- ❑ **It is the canners, processors, or exporters that make the mark in the world market, not the local catch**

Other Observations/ Recommendations

- ❑ **Options to Executive Order (EO):**
 1. Joint-Memorandum Circular between DA & other Line Agencies stipulated in the SO in order to have clearly approved parameters on the tasks and functions of concerned agencies
 2. Congressional enactment through legislation- long term- and harder
- ❑ **On the Composition: Include the LGUs of Gensan & Zamboanga – being the hub of the industry and considered tuna as focus commodity on their RDC plans**



Other Observations/ Recommendations

- ❑ **Need to consider, on a long term basis, distinct fishery management regimes for-**
 - ✓ Sulu-Celebes Sea
 - ✓ Moro Gulf
 - ✓ East Philippines (Mati Area)
 - ✓ Others????



thank you!