ASSOCIATION OF SOUTHEAST ASIAN NATIONS (ASEAN)

# THE MASTER PLAN AND FEASIBILITY STUDY ON THE ESTABLISHMENT OF AN ASEAN ROLL-ON/ROLL-OFF (RO-RO) SHIPPING NETWORK AND SHORT SEA SHIPPING

## FINAL REPORT
## DATA

March 2013

JAPAN INTERNATIONAL COOPERATION AGENCY (JICA)

ALMEC CORPORATION
Japan Marine Science Inc.
The Overseas Coastal Area Development Institute of Japan (OCDI)

**Exchange rates used in the report**

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| US$ | 1.00 | = | JPY | 81.48 | | | |
| EURO | 1.00 | = | JPY | 106.9 | = | US$ | 1.3120 |
| BN$ | 1.00 | = | JPY | 64.05 | = | US$ | 0.7861 |
| IDR | 1.00 | = | JPY | 0.008889 | = | US$ | 0.0001091 |
| MR | 1.00 | = | JPY | 26.55 | = | US$ | 0.3258 |
| PhP | 1.00 | = | JPY | 1.910 | = | US$ | 0.02344 |
| THB | 1.00 | = | JPY | 2.630 | = | US$ | 0.03228 |

(as of 20 April, 2012)

# TABLE OF CONTENTS

**Annexes**

# List of Tables

# LIST OF FIGURES

# List of Abbreviations

| | |
|---|---|
| Adpel | *Administrator Pelabuhan* (Port Administrator) |
| ALFI/ILFA | *Asosiasi Logistik & Forwarder Indonesia* / Indonesian Logistics & Forwarders Association |
| AMI | *Akademi Maritim Indonesia* (Maritime Academy Indonesia) |
| ASEAN | Association of Southeast Asian Nations |
| ASITA | Association of the Indonesia Tours and Travel |
| Bappeda | *Badan Perencanaan Pembangunan Daerah* (Regional Development Planning Board) |
| BIMP-EAGA | Brunei Darussalam-Indonesia-Malaysia-Philippines East ASEAN Growth Area |
| CEMCDO | City Economic Management and Cooperative Development Office |
| CIQS | customs, immigration, quarantine and security |
| CPO | crude palm oil |
| Disperindag | *Dinas Perdagangan dan Perindustrian* (Trade and Industry Agency) |
| DOT | Department of Tourism |
| DTI | Department of Trade and Industry |
| FOB | Freight on Board |
| GSCCCI | General Santos City Chamber of Commerce and Industry Incorporated |
| IDR/Rp. | Indonesian Rupiah (currency) |
| IMT-GT | Indonesia Malaysia Thailand - Growth Triangle |
| IQF | Individually Quick Frozen |
| JICA | Japan International Cooperation Agency |
| Kadin | *Kamar Dagang Indonesia* (Indonesia Chamber of Commerce) |
| MinDA | Mindanao Development Authority |
| MT | Metric Ton |
| MYR | Malaysian Ringgit (currency) |
| NBCT | North Butterworth Container Terminal |
| NMSAA | North Malaysia Shipping Agents Association |
| O-D | Origin-Destination |
| PELINDO | *Pelabuhan Indonesia* (Indonesia Port Corporation) |
| PhP | Philippine Peso (currency) |
| PNG | Papua New Guinea |
| RO-RO | Roll-On/Roll-Off |
| Sdn. Bhd. | *Sendirian Berhad* (Private Limited Company) |
| SME | small and medium enterprise |

| | |
|---|---|
| SOCCSKSARGEN | South Cotabato, Cotabato, Sultan Kudarat, Sarangani and General Santos City |
| TEU | Twenty-foot Equivalent Unit |
| TMO | Terminal Management Office |
| USD | US Dollar (currency) |
| WCO | World Customs Organization |

# ■ **Chapter 1** – Introduction

The Japan International Cooperation Agency (JICA) Study Team is conducting "*The Master Plan and Feasibility Study on the Establishment of an ASEAN Roll-On/Roll-Off (RO-RO) Shipping Network and Short Sea Shipping*" (hereinafter referred to as the "Study"), in close cooperation with the Association of Southeast Asian Nations (ASEAN). The three-fold objectives of the Study are to:

(1) collect and analyze a series of regional sea and land transport data/ information in ASEAN, Europe and other regions to realize expansion/ opening of RO-RO routes with efficient and reliable services;

(2) select priority routes among the eight candidate routes identified by ASEAN to be studied, covering 17 ports in five countries (Brunei Darussalam, Indonesia, Malaysia, Philippines and Thailand) and identify development issues and necessary policy recommendations by route; and

(3) recommend necessary policy initiatives to ensure RO-RO shipping services among ASEAN Member States after surveying legal and institutional frameworks in relation with international sea and land transport.

Figure 1.1 shows the eight candidate routes. The Study commenced in January 2012 and will be completed in March 2013.

Based on the results of the first field survey from March to May 2012, four (including two which have been merged into one triangle route) of the eight candidate routes had been shortlisted to be prioritized by the Study Team. These priority routes include General Santos (Philippines) – Bitung (Indonesia), Belawan (Indonesia) – Penang (Malaysia) – Phuket (Thailand), and Dumai (Indonesia) – Malacca (Malaysia) (see Figure 1.2).

The next phase of the Study involved a second round of field survey that aimed to gather more detailed information on the three priority routes. A Survey Team composed of Indonesian, Malaysian, Filipino and Thai staff was engaged by the JICA Study Team to implement the second field survey, entitled "Stakeholder Interview and Port Traffic Surveys," from August to October 2012.

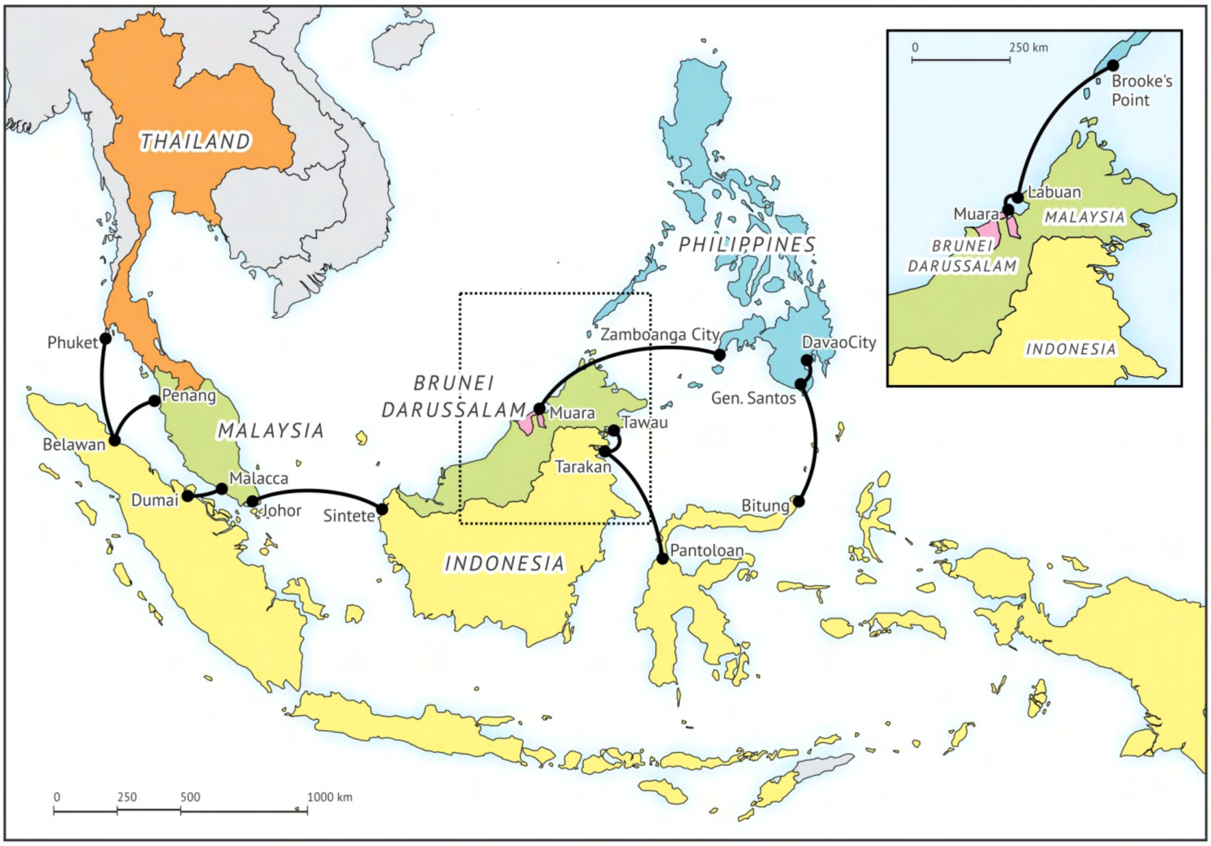



**Figure 1.1** – Eight RO-RO Shipping Candidate Routes for the Study


General Santos – Bitung | Belawan – Penang – Phuket | Dumai – Malacca

**Figure 1.2** – Shortlisted RO-RO Shipping Candidate Routes under the Second Field Survey

## 1.1 Scope of Works and Objectives

The Study requires the demand forecast and feasibility assessment for each priority route. The second field survey was conducted as a supplemental survey to better understand the market demand situation in the priority routes. For this purpose, the Study Team decided to gather stakeholders' current foreign trade practices and logistics chains, future foreign trade plans, and their perceptions about the planned RO-RO shipping services in the priority routes, as well as data on cargo and passenger shipping traffic volume in the ports covered by the priority routes. Two methods were used in relation with this field survey, namely the Stakeholder Interview Survey and the Port Traffic Survey.

*i) Stakeholder Interview Survey*

The stakeholder interview survey was conducted by the Survey Team in the following cities connected by the priority RO-RO routes:

- General Santos and Davao (Philippines);
- Penang (Malaysia);
- Bitung and Manado (Indonesia); and
- Belawan and Medan (Indonesia).

Aside from the above locations, the Survey Team also assisted the JICA Study Team in conducting small-scale stakeholder interview surveys in Dumai and Pekanbaru (Indonesia), Malacca (Malaysia) and Phuket (Thailand). The methodology and results of these surveys are discussed in Chapter 2.

*ii) Port Traffic Survey*

This survey aimed to capture actual foreign trade movements by commodity type between the three origin-destination (OD) pairs, namely: (1) Dumai – Malacca where a major target was non-conventional vessel trade; (2) Belawan – Penang where a major target was container trade; and (3) Bitung/Manado – General Santos/Davao where a major target was barter trade. The traffic surveys were conducted in Dumai, Belawan and Tahuna areas.

## 1.2 Survey Timetable

The pre-survey and actual survey activities were conducted between August and October 2012 following the detailed schedule below. The pre-survey activities included assisting the Study Team in conducting meetings with local stakeholders to brief them about the surveys, arranging with local survey partner organizations the recruitment and organization of survey teams, identifying and preparing lists of target survey respondents, and making administrative and technical preparations for the actual surveys.

**General Santos – Davao:**
Pre-Survey: 27 July – 22 August 2012
Stakeholder Survey: 23 August – 17 September 2012

**Manado – Bitung – Tahuna:**

Pre-Survey: 6 – 10 August 2012

Stakeholder and Port Traffic Surveys: 28 August – 7 October 2012

**Penang:**

Pre-Survey: 3 – 7 September 2012

Stakeholder Survey: 12 September – 15 October 2012

**Medan – Belawan:**

Pre-Survey: 10 – 14 September 2012

Stakeholder and Port Traffic Surveys: 17 – 28 September 2012

**Phuket:**

Stakeholder Survey: 17 – 20 September 2012

**Dumai – Pekanbaru:**

Pre-Survey: 23 – 30 September 2012

Stakeholder and Port Traffic Surveys: 1- 10 October 2012

**Malacca:**

Stakeholder Survey: 1 – 5 October 2012

## 1.3 Contents of the Report

This report on the stakeholder interview survey is presented in four chapters including this introductory chapter, as follows:

**Introduction** (Chapter 1): presents the background and objectives of the study and the survey.

**Survey Methodology and Process** (Chapter 2): describes the methodology and how the stakeholder interview survey activities were conducted.

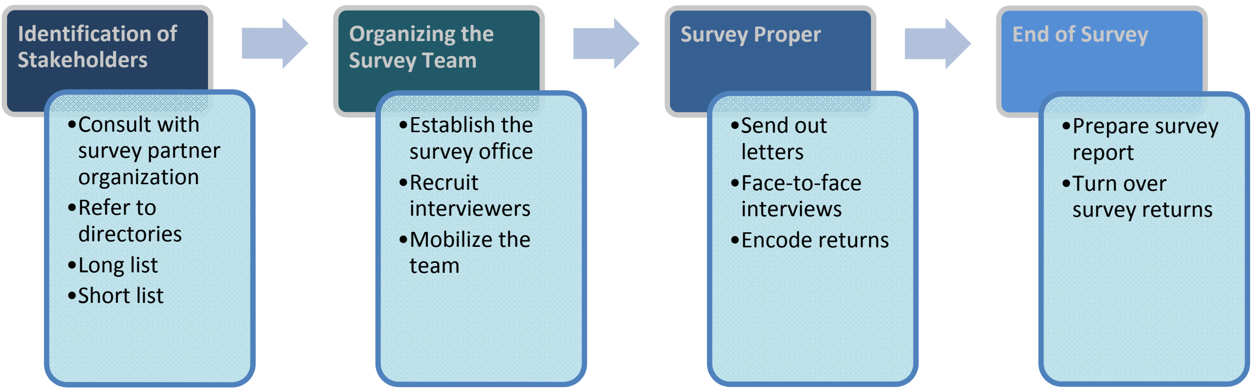
**Survey Results** (Chapter 3): presents the results of the stakeholder interview survey in all the aforementioned transport corridors.

**Conclusion and Recommendations** (Chapter 4): summarizes general conclusions and insights from the survey results and presents the lessons learned from the survey exercise.

# ■ **Chapter 2** – Survey Methodology and Process

## 2.1 General Methodology

The conduct of the stakeholder survey in the transport corridors of General Santos and Davao (Philippines), Manado and Bitung (Indonesia), Penang (Malaysia), Medan and Belawan (Indonesia), Phuket (Thailand), Dumai and Pekanbaru (Indonesia), and Malacca (Malaysia) followed a general process illustrated in Figure 2.1 and described in the following sections. When necessary, this process was adjusted to adapt to local conditions at the survey areas. The area survey teams were guided by a set of Guidelines for Survey Managers (see Annex 2.1) and another set of Guidelines for Interviewers (see Annex 2.2) prepared with the assistance of the JICA Study Team. The Study Team also provided guidance and advisory services to the survey teams during the survey.




**Source:** Survey Team, 2012

**Figure 2.1** – Stakeholder Interview Survey Process

### 2.1.1 Survey Objectives

The stakeholder survey aimed to:

a) inform the local stakeholders on the recent developments in the ASEAN RO-RO study;

b) gather data and information on the existing business operations of stakeholders who are target users of the priority RO-RO shipping routes (i.e., General Santos-Bitung, Dumai-Malacca, and Belawan-Penang-Phuket); and

c) gather data and information on stakeholders' future business projections, perceptions and opinions in relation to the planned routes.

The results of the survey would validate and expand on previous information gathered from the data gathering, stakeholder consultations and ocular visits conducted during the first field surveys of the study, particularly in the areas where there was incomplete or scant information. Such information would serve as inputs to the feasibility study being undertaken for these routes.

### 2.1.2 Sampling and Selection of Stakeholders

The survey entailed the face-to-face interviews of a limited sample of local stakeholders using two sets of prepared interview questionnaires, one for forwarders/ shippers/ consignees and another for travel and tour operators (see Annex 2.3). The questionnaires were prepared by the JICA Study Team with inputs from the assigned route survey managers. In each survey area, a team of surveyors/ interviewers were mobilized to conduct the interviews and to encode/process the survey returns, under the supervision of the survey manager assigned for each area.

The sampling methodology used was a stratified purposive sampling. It was purposive in that target stakeholders to be covered by the survey should be organizations that would have interests in the development of RO-RO shipping services in the three pilot routes–that is, those that have previous, existing and/or potential international trading or tourism activities across the routes using the partner ports. These mainly included cargo shippers (export and/or import), forwarders, consignees, and consolidators, as well as travel and tour operators, airline/ passenger shipping service agents, and other tourism organizations dealing with international inbound and outbound passenger movements. Whether or not based within the pilot routes' influence areas (defined as areas that will be impacted upon by RO-RO shipping development in the pilot routes), these stakeholders should be operating and/or planning to operate in the transport corridors of the pilot routes.

The target samples in each survey area were stratified according to type of stakeholders (e.g., shipper, forwarder, tourism organization) and size of establishment (small, medium, large). As majority of businesses in the survey areas are small and medium enterprises (SMEs), and since large companies either have their own private ports and/or deal mostly with large volumes of containerized cargo or bulk cargo that may not be suitable for RO-RO shipping, it was expected that majority of the samples would be SMEs. The distribution of the total target sample by type of business varied across the survey areas, depending on the universe of business establishments as well as the predominance of industries in each area. Such sample distribution was left to the discretion of the survey managers taking into consideration the proposed selection criteria below.

Priorities in the selection of target samples for the survey were given to the following stakeholders:

- Manufacturing companies operating or planning to operate businesses at the partner countries across the routes (e.g., Philippine-Indonesian joint venture fish canneries in Bitung, South Cotabato-based pineapple plantation/ cannery expanding its plantation area in Kalimantan, etc.);
- Companies with existing or future overseas branches at the partner countries;
- Companies supplying or planning to supply products to the partner countries;
- Companies sourcing or planning to source out products from the partner countries;
- Companies exporting to other Asian countries products that are being imported by the partner countries;
- Companies importing from other Asian countries products that are exported by the partner countries;
- Companies providing cargo forwarding services across the partner countries; and
- Companies facilitating the travel of people (e.g., residents, visitors, overseas workers) particularly across the partner countries.

The survey teams were made to take note that some stakeholders who were currently doing business across the partner countries may or may not be using direct air or marine transport routes, including the pilot routes, because of the lack of direct shipping (and/or air) services, costs, or other considerations. In such cases, official records of their trade or tourism flows across the pilot routes may not be readily available, if at all. It would be useful for the survey to capture this trading and tourism flow as potential cargo and passenger load for RO-RO shipping.

Together with the local partner organizations and in consultation with relevant business support organizations, the survey managers came up with a long list of target stakeholders for the survey using the abovementioned selection guidelines. This list was further filtered and refined to come up with a shortlist of the target number of stakeholders per area (up to 50 in some areas). The shortlist included a buffer of at least 20 additional stakeholders to replace any of the initial 50 who may decline to participate for any reason.

### 2.1.3 Survey Organization

For the survey, interviewers were generally from the survey areas and were mostly professionals (not student level) with a facility to talk with senior officers of stakeholder organizations and preferably with a certain level of familiarity with economic and business conditions in the influence areas of their pilot ports. The survey managers requested assistance of the survey partner organizations in recruiting the interviewers. The survey managers mobilized enough number of interviewers to complete the survey within the timetable.

Upon request by the survey managers, the offices of the survey partner organizations served as the survey offices where the survey teams based their respective survey operations. Access to office facilities including tables and chairs, telephone, internet, etc. was provided in the offices.

### 2.1.4 Survey Proper

Target stakeholders on the final shortlist were sent invitations/requests to participate in the survey, by email or phone or through the intercession of the survey partner organizations. The invitation letter included a copy of the survey brief (see Annex 2.4), questionnaire with route map and RO-RO operation plan (see Annex 2.5), and general instructions. Where appropriate and however best to encourage stakeholder participation, the letter was signed either by the head of the survey partner organization (see Annex 2.6) or by the JICA study team leader (see Annex 2.7). In some areas, the JICA letter was accompanied by a separate endorsement/ request letter from the survey partner organization. The Study Team and survey managers prepared the template letters. The survey manager assigned the interviewers their respective stakeholders to contact and interview. The number of assigned stakeholders per interviewer depended on the number of interviewers mobilized.

After sending the requests, the interviewers initially called their respective assigned stakeholders to confirm their receipt of the invitations and willingness to participate (or not) in the survey, and answered any queries/clarifications by the stakeholders. If willing to participate, the interviewer asked for the name of the contact person/interviewee and the appointment schedule for the on-site face-to-face interview either at respondent's office or any other convenient location, including the office of the partner organization. An advantage of doing the interviews at the respondents' offices was that they would have ready access to reference documents or records to source information required by the questionnaires. For some stakeholders, the survey team had to call back a few more times to confirm the appointments and interviewees. When the number of willing participants went below the target sample number, additional stakeholders were invited from the buffer shortlist.

In some areas, one or two interviewers were assigned to do all the calling and following up for interview appointments. As appointments were confirmed, interviewers were sent out to do the interviews. To save time, interviewers did the on-site interviews immediately, even while succeeding appointments were being confirmed. When most of the appointments had been made, the interviewers doing the initial calls joined the conduct of interviews.

The survey managers were left to decide what would be the suitable transport arrangements for the interviewers, either by group or individual. For time and cost convenience and whenever possible, each interviewer were assigned interview appointments within the same vicinity.

As soon as accomplished, the survey questionnaires were submitted to the survey manager for checking and validation, in some cases with assistance from one of the interviewers. Questionnaires needing further validation/completion with the stakeholders were returned to the concerned interviewers for completion. These interviewers contacted the concerned stakeholders for completion of the questionnaires either by phone or on-site interview, whatever was appropriate. The survey manager or his/her assistant validated the questionnaires again until found acceptable.

### 2.1.5 Encoding and Processing of Survey Returns

Encoding of successfully accomplished questionnaires was done by the survey managers and/or assigned encoders. The encoders used an Excel-based coding template prepared by the JICA Study Team (see Annex 2.8). The survey managers monitored and supervised the encoding on the field, ensuring that this task was done properly and efficiently.

The coding template included output tables that could be automatically generated from the encoded returns anytime. The required template output tables were provided by the JICA Study Team. Initial output tables were generated to indicate trends and patterns that were used in preliminary analysis. Final output tables were generated when all the survey returns had been encoded.

### 2.1.6 Completion of Survey and Turnover of Survey Returns

The survey managers prepared brief reports on the conduct of the survey and any implementation issues and lessons learned. Later, when the output tables were generated, the survey managers prepared narrative reports on the analysis of the survey returns. These reports were submitted to the JICA Study Team for use in the preparation of the Draft Final Report between November and December 2012. It should be noted that, as agreed with participating stakeholders during the surveys, confidentiality of proprietary information gathered during the survey was maintained by not identifying companies and personalities in the reports and by treating survey data in aggregates.

All accomplished survey questionnaires, encoded files, and output tables generated were turned over to the JICA Study Team upon completion of the survey.

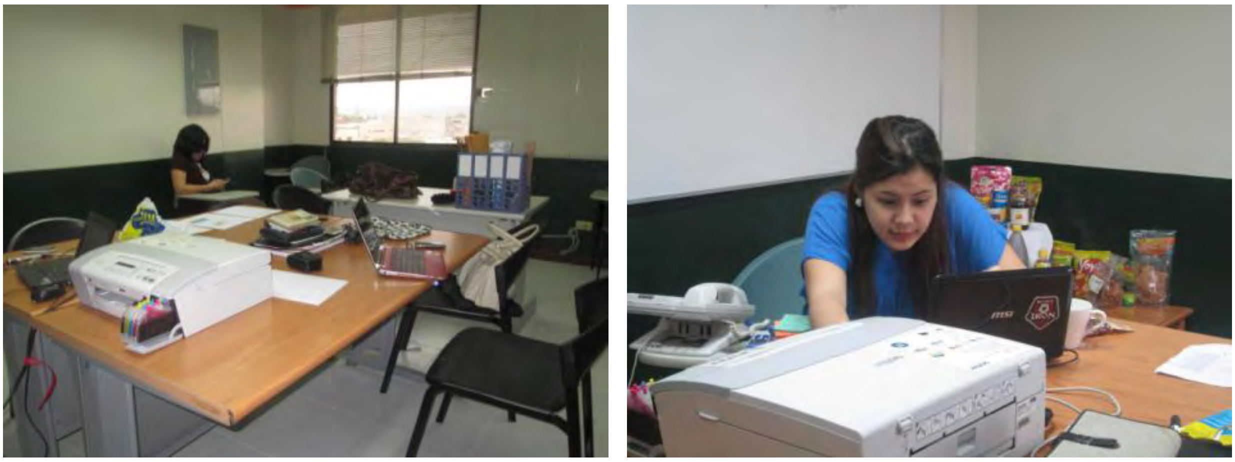
## 2.2 Area Surveys

### 2.2.1 General Santos and Davao

The stakeholder interview survey for the General Santos-Bitung route was conducted in General Santos City and its influence area in Region XII (South Cotabato/ Cotabato City/ Sultan Kudarat/ Sarangani/ General Santos or SOCCSKSARGEN Region) and Region XI (Davao Region).

The long list of target stakeholders was put together from the existing databank of the survey team and validated during the meetings with local partner organizations and other relevant government and business groups. These organizations likewise suggested potential interviewees from among their members and/or recipients/ beneficiaries of their technical assistance.

The survey team partnered with the Department of Trade and Industry (DTI) in Regions XI and XII for assisting the Davao and General Santos sub-survey teams, respectively. DTI is a government office which is responsible for the advancement of trade and industry such as value addition, customer welfare, industry upgrading, trade relations, market matching and the like. As part of its assistance, DTI provided focal persons, helped validate the initial long list of target stakeholders, provided office space for the Davao team (see Figure 2.2), and allowed the General Santos team scheduled use of its meeting rooms in Koronadal City and General Santos.



**Source:** General Santos and Davao Stakeholder Survey Team, 2012

**Figure 2.2** – Survey Office Setup in Davao

The General Santos City Chamber of Commerce and Industry Incorporated (GSCCCI) also provided the General Santos survey team with a list of their members for possible selection of target stakeholders. GSCCCI is a private group in General Santos that focuses on the advancement of business and business organizations in the city by advocating for sound business policies with concerned authorities, providing a forum to discuss relevant business issues and concerns, implementing seminars and training programs on business tools/ techniques/ methods.

The City Economic Management and Cooperative Development Office (CEMCDO) of General Santos likewise referred the survey team to its Tourism Operations Division, for the list of travel and tour operators in the city. The City Tourism Office provides the authority, infrastructure, policy planning, and procedures to maximize the benefit of tourism for its local communities.

The Davao-based Mindanao Development Authority (MinDA) also referred a number of stakeholders. MinDA was created to promote, coordinate and facilitate the active and extensive participation of all sectors to effect the socioeconomic development of Mindanao. Among other functions, MinDA is the Philippine Coordinating Office for the Brunei Darussalam-Indonesia-Malaysia-Philippines East ASEAN Growth Area (BIMP-EAGA).

The Department of Tourism (DOT) in Region XI provided the list of travel and tour operators and identified the stakeholders to be interviewed. DOT is the executive department of the Philippine government responsible for the regulation of the Philippine tourism industry and the promotion of the Philippines as a tourist destination.

The original target sample of 60 total respondents (including a buffer of 10) for the Davao/ General Santos corridor was divided to a target of 40 and 20 respondents, respectively, for General Santos and Davao. More stakeholders were included in General Santos considering that the partner port for the route is the General Santos Port (Makar Wharf). The total target number was deliberately intended to include 50 shippers/ forwarders/ traders and 10 travel and tour operators.

In view of the wide influence areas for the General Santos-Bitung route, the survey team was divided into sub-survey teams for General Santos and Davao. The General Santos team was composed of four interviewers and one office assistant/ interviewer. The Davao team was composed of one interviewer and one office assistant. Most of the interviewers of the General Santos team were alumni of a recent DTI XII short-term project who were referred by DTI.

The survey team members are professionals and have experience in handling interviews. They were thoroughly briefed on what and how their roles should be carried out to create the desired output for the survey. The Study Team member and survey manager held several meetings with the General Santos and Davao teams to provide guidelines and tips in handling the interviews. This included role playing/ mock interview sessions. On the average, an interview was estimated to last from 30-45 minutes, depending on the preparedness of the respondents and the amount of information they could provide.

The survey proper included sending of request letters for interview, confirmation of interview schedules, interview proper (face-to-face), and encoding of survey returns.

The survey assistants facilitated the sending out of two request letters to each stakeholder. The cover letter was from the DTI XII and DTI XI Regional Directors endorsing and encouraging support for the survey, citing trade promotion and economic development that can be reaped from the expansion of Mindanao's international maritime connectivity. The other is the JICA letter from the Study Team Leader providing a background on the survey and inviting the stakeholders' participation in the survey. The survey brief, questionnaire, and RO-RO operational plan were attached to the JICA letter.

After the letters were sent, the survey assistants called the companies to confirm receipt of the request letters, clarify the purpose of the survey, answer any queries of the company representatives, and ask for confirmation of interview representatives and appointments. These calls were also generally used to verify if the companies have existing or potential interests in Indonesia and/or the General Santos-Bitung route. In many cases, the survey assistants were asked to call again because the interviewees were not available at the moment. The survey assistants continued to make follow-up calls (sometimes up to 4-6 times) until appointments were confirmed or the respondents outrightly said they were not interested to participate in the survey. The short list of target respondents included enough buffers to replace those who would refuse or were not appropriate to participate. Even while the interviews were ongoing, the Survey Team simultaneously continued to send out letters, confirming interview appointments, and assigning these to the interviewers.

It was estimated that the interview period of two weeks could be achievable by assigning the interviewers 2-3 interviews per day and by organizing appointments for them that would be in close proximity to each other. This target schedule, however, was not realized because (1) there were days when only one interviewee confirmed to be interviewed; (2) there were days when no interview was confirmed; and (3) there were days when several confirmed appointments were with companies located far apart from each other (and respondents did not like to be re-scheduled). The first two weeks of the survey also coincided with some long holidays in the Philippines. A combination of these factors delayed the survey timetable, stretching the actual completion of the survey proper to almost four weeks, from the last week of August to the third week of September 2012.

The venues for the face-to-face interviews were either the offices of the respondents or inside their conference rooms (see Figure 2.3). The Guidelines for Interviewers helped the interviewers in properly handling the interview.

Among the lessons learned from the survey are: (1) survey organization, stakeholder identification and conduct of the survey proper become easier and smoother because of the reliable networks, influence and cooperation of local survey partner organizations; (2) cooperation and participation of stakeholders in the survey are facilitated by giving them adequate background information on the objectives, process and benefits to be derived from the survey, by giving them advance copies of the questionnaires, by the assurance of confidentiality of information, and by the preparedness and skill of the survey team members in conducting the interviews; and (3) the quality of the output of the interviews depends on the position/ designation of the respondent within the company (highly positioned respondents such as Owner/ CEO, Vice President, General Manager, Financial Manager, Logistics Head, etc. were more likely to answer the questions comprehensively), and his/her positive attitude and openness towards the whole interview experience.

**Source:** General Santos and Davao Stakeholder Survey Team, 2012

**Figure 2.3** – Actual Interviews with Davao/ General Santos Respondents

### 2.2.2 Bitung and Manado

The stakeholder interview survey in Bitung and Manado was conducted from 28 August until 7 October 2012, two weeks after the completion of pre-survey activity that was conducted together with the JICA Study Team (6–10 August 2012). Like the General Santos/ Davao survey, it particularly aimed to gather information on current and potential cargo and passenger demand as well as stakeholder perceptions with regard to the planned RO-RO shipping service connecting Bitung with General Santos.

During the pre-survey, the Study Team and the survey manager were able to have a courtesy call on the Governor of North Sulawesi and to successfully arrange to partner with the Regional Development Planning Board (BAPPEDA) of the North Sulawesi Provincial Government and the BIMP-EAGA Regional Secretariat in Manado for the conduct of the survey (see Figure 2.4). These local survey partner organizations assisted the survey team in recruiting interviewers from among teachers at the Sam Ratulangi University, identifying target stakeholders, making administrative arrangements for meetings and interviews with other local agencies, and making available its office as the survey office. The survey team was eventually organized, consisting of the survey manager and four local interviewers from Manado, one of whom acted as interviewer-coordinator who made the phone calls to each candidate respondent and arranged the interview schedules during the survey period.

**Source:** Bitung and Manado Stakeholder Survey Team, 2012

**Figure 2.4** – Meetings with Partner Organizations and Recruitment of Interviewers in Manado

Two main stakeholder categories were defined as target sources of samples for the interviews, namely shippers and travel agent. In the case of shippers, sample stakeholders included producers/ manufacturers, traders, and freight forwarders. A long list of candidate respondents was gathered from suggestions from the North Sulawesi Trade and Industry Agency (Disperindag), Chamber of Commerce (KADIN), Forwarders Association (ALFI/ILFA), and Tour and Travel Agents Association (ASITA). BAPPEDA provided the survey team a cover letter to support the survey activity and encourage stakeholder participation.

Two main methods of interview were employed in the Bitung and Manado survey. One was for the interviewers to visit the respondents' offices directly. The other was to hold small group meetings with several respondents (within the same sector) by invitation from their respective associations, in which meetings the interviewers conducted the interviews. With a total target sample of 50 stakeholders, the survey was able to successfully interview 45 respondents, consisting of 30 from the logistics sector and 15 from the tourism sector (see Table 2.1).

**Table 2.1** – Number of Interview Attempts and Successful Interviews (Bitung and Manado)

| | No. of Interview Attempts | No. of Successful Interviews |
|---|---|---|
| Logistics sector | 43 | 30 |
| Tourism sector | 15 | 15 |
| TOTAL | 58 | 45 |

**Source:** Bitung and Manado Stakeholder Survey Team, 2012

Simultaneously with the stakeholder survey in Bitung and Manado, a separate team went to Tahuna, Sangihe Island to conduct the port traffic survey there. The team made ocular visits to several ports within the regency which mainly catered to non-conventional vessels engaged in barter or informal trading, met and interviewed representatives of local agencies, shipping/ forwarding groups, and gathered secondary and primary data wherever available.

### 2.2.3 Penang

The stakeholder interview survey in Penang, Malaysia aimed to gather primary information on existing and potential trade and passenger demand among a target sample of 50 local stakeholder companies. This information will serve as inputs to the feasibility study of operating RO-RO shipping services in the Penang-Belawan-Phuket route.

The survey was implemented on 12 September-15 October 2012. The initial target survey period was 12-22 September 2012 but, due to low response rate, the period was extended to 15 October.

The survey was conducted to gather and compile primary data, based on two sets of pre-formulated questionnaires targeting key stakeholders of the following two targeted categories:

(1) Logistics sector
- (a) Importers/ Exporters
- (b) Traders
- (c) Shipping Agents
- (d) Forwarders
- (e) Shippers/ Consignees/ Distributors

(2) Tourism sector
- (a) Travel/ Tour agents
- (b) Transport operators
- (c) Hoteliers

A Penang-based survey manager was commissioned to organize his survey team and run the stakeholder survey, with the assistance of a local survey partner organization (TYC Resources Sdn. Bhd.). The survey team consisted of the survey manager, two senior researchers, an administrative assistant/ encoder, and a survey adviser and was based at the survey partner's office.

Prior to the field survey, several pre-survey consultations meetings/ discussions were arranged from 3-7 September 2012 between the project researchers and the following stakeholder organizations in Penang (see Figure 2.5):

1) Penang Port Sdn. Bhd.
2) Penang Port Commission
3) North Malaysia Shipping Agents Association (NMSAA)
4) Penang Freight Forwarder Association
5) Penang Chinese Chamber of Commerce
6) Penang Importer and Exporter Association
7) IMT-GT Joint Business Council
8) Northern Corridor Implementing Authority (NCIA, Tourism and Logistics Division)
9) Ministry of Tourism Malaysia, Penang Office
10) Penang Global Tourism
11) Penang State Economic Planning Unit
12) Few firms (trading) that have business activities between Penang-Belawan-Kantang.


**Source:** Penang Stakeholder Survey Team, 2012

**Figure 2.5** – Meeting with Stakeholders and Port Visit in Penang

These stakeholders/ associations had been receptive of the survey/ study and expressed interest in the proposed RO-RO services among Belawan-Penang-Phuket. They also rendered invaluable assistance to inform as well as distribute the questionnaires to their respective members.

A total of 40 survey replies were gathered during the survey period, including 24 from the logistics sector and 16 from the tourism sector, as shown below.

**Table 2.2** – Number of Survey Respondents (Penang)

| | Logistics sector | Tourism sector | TOTAL |
|---|---|---|---|
| No. of Replies | 24 | 16 | 40 |

**Source:** Penang Stakeholder Interview, Survey Team, 2012

The target number of respondents was 50. However, despite the assistance of the industrial associations/ chamber of commerce, the surveyors were unable to meet this target number. The main reasons for this low participation rate, as observed by the surveyors, are as follows:

1) A number of firms (both in logistics and tourism sectors) that were approached indicated that the RO-RO service is not relevant to them and would not be using the service. Therefore, most of them were reluctant to participate in the survey.
2) The questionnaire is too complicated. Filling it up takes too much time.
3) Financial data is sensitive information and all the respondents did not wish to disclose or share such information during the interview.
4) Shipping lines are bound by the Competition Act (Anti-Trust) which forbids them to expose their service details, etc.
5) Some companies asked for a letter of authorization for the surveyors to collect the data.
6) The travel and tour industry in Penang is very competitive. The tour agents were not inclined to share sensitive data. Furthermore, the price per pax were revised from time to time according to different tour packages. They did not have time to go into details.
7) Most of them did not indicate their expectation/ comments as the proposed RO-RO service is still in the pipeline and they found it too early to offer comments. Furthermore, most of their current modes are air/ road; RO-RO may not be relevant to the tour industry.
8) The field survey period was short.

To rectify the above challenges in generating survey participation, the survey team had to fully utilize their own contacts and personal relation with the respondents in their respective industries to get positive replies. The surveyors adopted face-to-face interviews and filled up the questionnaires on the spot for the respondents. The surveyors tried their best to gather aggregate travel trade or import/export data from Penang Port and Ministry of Tourism to counter/ rectify the lack of data from the field survey.

### 2.2.4 Belawan and Medan

The stakeholder interview survey in Medan and Belawan was conducted by Survey Team from 17-28 September 2012, after the completion of pre-survey activities by the JICA Study Team (10-14 September 2012). The survey manager was supported by 12 local interviewers recruited from the survey partner organization, Maritime Academy Indonesia-Medan (AMI). The survey team was divided into six small groups of two persons per group. Another person was hired as coordinator to make appointments by phone calls to candidate respondents.

During the pre-survey, the Study Team and the survey manager met with several agencies and stakeholder associations such as Chamber of Commerce (KADIN), Forwarders Association, and Tour and Travel Association (see Figure 2.6). These agencies helped the survey team by providing lists of candidate stakeholder respondents. KADIN North Sumatra also supported the team by sending an official letter to their members to participate in the survey.

To fill out the questionnaires, the survey team first made appointments to visit candidate stakeholders for the interviews. Once confirmed the interviewers conducted face-to-face interviews and filled out the questionnaires on the spot. Some of the respondents welcomed the survey and gave useful information, but some of them were not so interested.

**Source:** Belawan and Medan Stakeholder Survey Team, 2012

**Figure 2.6** – Meeting with Shippers in Medan and with Immigration Agency in Belawan

A total of 35 stakeholders were successfully interviewed in Medan and Belawan. Of these, 25 were from the cargo/ logistics sector and 10 were travel and tour operators.

The port traffic survey team also conducted their tasks in Belawan, including meeting with local government and private sector organizations, interviewing local shipping operators/ agents and forwarders, gathering trade and passenger data, and conducting ocular port visits.

### 2.2.5 Phuket

As part of the planned Belawan-Penang-Phuket RO-RO route, the stakeholder interview survey in Phuket was conducted on 17-20 September 2012. A Phuket-based researcher was commissioned to arrange and coordinate the meetings of the JICA Study Team with selected stakeholder organizations and companies.

The survey only covered a small sample of 5 respondents, including 2 cargo stakeholders and 3 travel/tourism stakeholders.

### 2.2.6 Dumai and Pekanbaru

The stakeholder interview survey in Pekanbaru and Dumai was conducted by the survey team on 1-10 October 2012, after completion of the pre-survey activities by the JICA Study Team (23-30 September 2012). It aimed to gather primary information on current and potential cargo and passenger demand and stakeholder perceptions relating to the planned RO-RO shipping service connecting Dumai and Malacca.

The survey team consisted of the survey manager, a local survey coordinator and three local interviewers. The coordinator made the phone calls to candidate respondents and arranged for interview schedules during the survey period. The three interviewers then conducted the face-to-face interviews.

As in all the other area surveys, the stakeholder survey in Pekanbaru and Dumai covered both shippers and travel agents. The shippers included samples of producers, manufacturers, traders, and forwarding companies. The target list of candidate respondents was prepared after meetings with the Riau Trade and Industry Agency (Disperindag), Chamber of Commerce (KADIN), Forwarders Association (ALFI/ILFA), and Tour and Travel Agents Association (ASITA) during the pre-survey. The Riau Provincial Secretary (SETDA) provided the survey team a cover letter to encourage stakeholder participation and to facilitate the survey activity.

The survey employed two main methods of interview, namely directly visiting respondents' offices to conduct face-to-face interviews, and arranging small group meetings with several respondents (from the same sector) at a time through their associations and conducting face-to-face interviews during the meetings. Successful interviews of a total of 15 respondents were completed. These included 10 shippers/ producers/ traders/ forwarders and 5 travel and tour operators.

The port traffic survey team investigated conditions at the ADPEL-Dumai Port, the new domestic RO-RO terminal near Dumai Port, and the non-conventional vessel port also nearby (see Figure 2.7). They met with local stakeholder organizations to gather secondary and primary data on cargo and passenger traffic at the ports.

**Source:** Dumai and Pekanbaru Stakeholder Survey Team, 2012

**Figure 2.7** – Ocular Visits to the Domestic RO-RO Terminal and Traditional Vessel Port in Dumai

### 2.2.7 Malacca

The Malacca stakeholder survey, conducted on 1-5 October 2012, covered a small sample of 8 stakeholders including 3 traders/ distributors/ retailers and 5 tourism service operators. Their businesses are small- to medium-sized, while no large business entity was interviewed. For the stakeholder interviews, the State Government of Malacca introduced the Study Team to the Malay Chamber of Commerce, which has mostly SME members.

# ■ **Chapter 3** – Survey Results

## 3.1 General Santos and Davao

### 3.1.1 General Profile of Stakeholders

The actual sample number of stakeholders in the Davao/ General Santos corridor totals 56, with 34 based in the SOCCSKSARGEN region and 22 in the Davao region (see Table 3.1). These include 34 shippers/ manufacturers/ processors (61% of the total), 8 traders/ distributors/ retailers (14%), 5 forwarders (9%), and 9 travel and tour operators (16%). This report will present a separate discussion on the cargo users from the tour operators.

Most (44 or 79% of the total) of the stakeholders are headquartered within the two regions, particularly in the cities of General Santos and Davao. Another 11 (20%) are branch offices while only 1 (1%) is a satellite office. For operational cost considerations, the agriculture and fishery producers/ processors are located where their sources of raw materials are near and/or concentrated. For example, the fruit companies are located in Polomolok and Tupi, South Cotabato where the major fruit plantations and farms are. The coconut-based companies are located in Davao del Sur and Toril, Davao City (the next biggest town before the Province of Davao del Sur from Davao City). The Davao companies engaged in banana have offices in Davao City, near Davao Port, but have plantation areas in Davao del Norte, North Cotabato and Bukidnon while those operating in Region XII are based in General Santos. The fishery and seafood companies are based in General Santos, particularly near the Fish Port Complex. Traders and forwarders are mostly located in the General Santos and Davao City proper where the airports and seaports as well as their clients' head offices are. The travel and tour operators are spread in different locations in the city proper, to make them accessible to their clients who mostly live in the cities.

**Table 3.1** – Distribution of Survey Sample by Type of Stakeholder (Davao and General Santos)

| Region | Shipper/ manufacturer/ processor | Trader/ distributor/ retailer | Freight forwarder | Travel & tour operator | TOTAL |
|---|---|---|---|---|---|
| SOCCSKSARGEN | 21 | 6 | 2 | 5 | 34 |
| Davao | 13 | 2 | 3 | 4 | 22 |
| TOTAL | 34 | 8 | 5 | 9 | 56 |
| % | 60.7 | 14.3 | 8.9 | 16.1 | 100.0 |

**Source:** Davao and General Santos Stakeholder Interviews, Survey Team, 2012

### 3.1.2 Cargo Stakeholders

The main business of majority (49%) of the 47 cargo stakeholders is agricultural or fishery production and processing (see Table 3.2). Some 26% are into non-agriculture/ fishery manufacturing, another 15% are distributors/ traders/ dealers, and 9% are forwarders.

**Table 3.2** – Cargo Stakeholders by Type of Business (Davao and General Santos)

| Item | | Forwarder | Trucking | Agri. producer | Fishery producer | Agri./ fishery processor | Manufacturer (non-agri./ fishery) | Distributor / trader / wholesale dealer | Others | TOTAL |
|---|---|---|---|---|---|---|---|---|---|---|
| Main business | No | 4 | 0 | 11 | 4 | 8 | 12 | 7 | 1 | 47 |
| | % | 9 | - | 23 | 9 | 17 | 26 | 15 | 2 | 100 |
| Business activities | No | 5 | 5 | 12 | 4 | 20 | 14 | 23 | 2 | 85 |
| | % | 6 | 6 | 14 | 5 | 24 | 16 | 27 | 2 | 100 |

**Source:** Davao and General Santos Stakeholder Interviews, Survey Team, 2012

For this study, the sizes of the stakeholder companies are classified according to the asset size or capitalization (see Table 3.3). Most of the cargo stakeholders are medium-sized (34%) and large (23%) or with asset/ capitalization of between PhP15 million and over 200 million. These are mainly the producers/ manufacturers and processors. Another 15% are either in the micro or small levels, with capitalization of less than PhP15 million.

The gross sales of the stakeholders in 2011 generally followed their company size, that is, the bigger the company the higher its gross sales. Again, the agriculture/ fishery producers and processors as well as non-agriculture/ fishery manufacturers posted the higher sales.

**Table 3.3** – Cargo Stakeholders by Company Size (Davao and General Santos)

| Company size (shippers) | No. of comp. by employment size | No. of comp. by capitalization | Forwarder | Trucking | Agri. producer | Fishery producer | Agri./ fishery processor | Manufacturer (non-agri./fishery) | Distributor / trader / wholesale dealer |
|---|---|---|---|---|---|---|---|---|---|
| Micro* | 8 | 7 | 1 | 0 | 1 | 0 | 1 | 1 | 2 |
| % | 17.0 | 15.0 | 2.1 | 0.0 | 2.1 | 0.0 | 2.1 | 2.1 | 4.3 |
| Small | 16 | 7 | 1 | 0 | 0 | 0 | 1 | 3 | 2 |
| % | 34.0 | 15.0 | 2.1 | 0.0 | 0.0 | 0.0 | 2.1 | 6.4 | 4.3 |
| Medium | 9 | 16 | 0 | 0 | 4 | 2 | 3 | 5 | 2 |
| % | 19.2 | 34.0 | 0.0 | 0.0 | 8.5 | 4.3 | 6.4 | 10.6 | 4.3 |
| Large | 14 | 11 | 1 | 0 | 3 | 2 | 2 | 2 | 1 |
| % | 29.8 | 23.4 | 2.1 | 0.0 | 6.4 | 4.3 | 4.3 | 4.3 | 2.1 |

| Company size (shippers) | No. of comp. by employment size | No. of comp. by capitalization | Forwarder | Trucking | Agri. producer | Fishery producer | Agri./ fishery processor | Manufacturer (non-agri./fishery) | Distributor / trader / wholesale dealer |
|---|---|---|---|---|---|---|---|---|---|
| No answer | 0 | 6 | 1 | 0 | 3 | 0 | 1 | 1 | 0 |
| % | 0.0 | 12.8 | 2.1 | 0.0 | 6.4 | 0.0 | 2.1 | 2.1 | 0.0 |
| TOTAL | 47 | 47 | 4 | 0 | 11 | 4 | 8 | 12 | 7 |
| % | 100.0 | 100.0 | 8.5 | 0.0 | 23.4 | 8.5 | 17.0 | 25.5 | 14.9 |

*) One micro-enterprise respondent did not indicate their main business.

**Source:** Davao and General Santos Stakeholder Interviews, Survey Team, 2012

Foreign trade patterns/ practices

In 2011, the cargo stakeholders included in the Davao/ General Santos survey handled a combined total export volume of 10.7 million MT valued at USD1.6 billion, and imports of 541 thousand MT valued at USD77.8 million (see Table 3.4). The bulk of the export tonnage was handled by the forwarders (82%) and agricultural producers (17%). In terms of value, however, the fishery producers and agriculture producers contributed the greatest value, sharing 66% and 31%, respectively. This indicates that the fishery and agriculture producers are handling the higher value adding commodities such as fresh and processed fish (especially tuna) and seafood products, fresh and processed fruits (pineapple, banana, mangoes), coconut and its byproducts (e.g., crude coconut oil, copra expellers, activated carbon, charcoal briquettes), rubber, palm oil, etc. while the forwarders are handling heavy tonnage but lesser value general cargoes. Another possible reason is that traders may not be very accurate in estimating the value of their cargoes which, as some of them mentioned during the interviews, was better known to their clients. Non-agriculture/ fishery manufacturers contribute 3% of total export value, consisting mostly of packaging materials (labels, stickers, corrugated cartons), copper ore, cement, furniture and home decors, wall panels, scrap tin cans, etc.

Again, the forwarders handled the biggest volume of imports (56%) though their estimated value was minimal, pointing to the above-cited possible reasons. The agriculture producers were also big importers in terms of both tonnage (41%) and value (73%). Major imports consist of agricultural raw materials and inputs like copra, fertilizer, insecticides, fungicides, herbicides, etc. Non-agriculture/ fishery manufacturers and traders/ distributors are also significant importers of high-value commodities (at 15% and 11%, respectively), mostly of tin and steel raw materials, packaging materials, thermal paper, petroleum products, etc. Both agricultural and non-agribased companies also import spare parts of industrial machines and equipment, sprayers, coal and clinker, gypsum. Imported products are generally shipped via Singapore or from Singapore. Some respondents have limited/no information on the port of origin of some imported products. Light industrial machines and/or equipment parts are usually shipped via air transport to shorten the delivery time.

**Table 3.4** – Export Volume and Value of Cargo Stakeholders by Nature of Business, 2011 (Davao and General Santos)

| Main business | Export | | | | Import | | | |
|---|---|---|---|---|---|---|---|---|
| | Volume | | Value | | Volume | | Value | |
| | ton | % | USD | % | ton | % | USD | % |
| Forwarding | 8,778,920 | 82.0 | 300,000 | 0.02 | 302,650 | 55.9 | 20,000 | 0.03 |
| Trucking | - | 0.0 | - | 0.0 | - | 0.0 | - | 0.0 |
| Agricultural producer | 1,850,942 | 17.0 | 491,969,048 | 30.7 | 222,055 | 41.1 | 56,671,524 | 72.9 |
| Fishery producer | 5,130 | 0.05 | 1,054,857,143 | 65.8 | 412 | 0.08 | 693,095 | 0.9 |
| Agri./ fishery producer | 42,298 | 0.4 | 10,614,305 | 0.7 | 400 | 0.08 | 190,476 | 0.2 |
| Manufacturer (non-agri./fishery) | 45,510 | 0.4 | 41,647,619 | 2.6 | 14,200 | 2.6 | 11,729,955 | 15.1 |
| Distributor/ trader/ wholesale dealer | 8,855 | 0.1 | 4,198,062 | 0.3 | 1,300 | 0.2 | 8,464,048 | 10.9 |
| TOTAL | 10,731,655 | 100.0 | 1,603,586,176 | 100.0 | 541,017 | 100.0 | 77,769,098 | 100.0 |

**Source:** Davao and General Santos Stakeholder Interviews, Survey Team, 2012

## Stakeholders' trading patterns vis-a-vis regional patterns

The major exports and imports of the surveyed stakeholders reflect the major industries of the Davao and SOCCSKSARGEN regions. Banana and coconut are the competitive advantages of the Davao Region. As shown in next table, fresh bananas and coconut and its byproducts are the top two exports from Davao, followed by fresh pineapples (coming from South Cotabato in Region XII but shipped out through Davao), rubber, gold, activated carbon, fruits and nuts, and fish. In 2010, these exports were valued at about USD730 million, accounting for nearly a third of Mindanao's total export value.

**Table 3.5** – Top Ten Exports and Principal Export Markets of Davao Region, 2010

| Export | | | Export market | | |
|---|---|---|---|---|---|
| Rank | Commodity | FOB value in US$ | Rank | Country | FOB value in US$ |
| | **Total Exports** | **784,886,299** | | **Total Exports in Top Markets** | **683,291,034** |
| | % to Mindanao Exports | 28.3 | | | |
| | **Top Ten Exports** | **729,733,694** | | | |
| 1 | Bananas, including plantains, fresh | 310,957,069 | 1 | Japan (excludes Okinawa) | 208,305,138 |
| 2 | Coconut (copra), palm kernel or babassu oil | 222,339,449 | 2 | United States of America | 115,012,245 |
| 3 | Pineapples, fresh | 34,013,185 | 3 | Netherlands | 100,096,132 |
| 4 | Desiccated coconut | 33,307,350 | 4 | China, People's Rep. of | 70,066,118 |
| 5 | Natural rubber | 32,086,114 | 5 | Korea, Rep. of (South) | 44,153,854 |

| Export | | | Export market | | |
|---|---|---|---|---|---|
| Rank | Commodity | FOB value in US$ | Rank | Country | FOB value in US$ |
| 6 | Gold (incl. gold plated with platinum) unwrought or in semi-finished form | 27,716,410 | 6 | Singapore | 42,450,005 |
| 7 | Activated carbon | 26,422,900 | 7 | Iran, Islamic Rep. of | 39,698,776 |
| 8 | Fruits, nuts and other edible parts of plants | 24,141,026 | 8 | Switzerland | 27,896,793 |
| 9 | Oil-cake and other solid residues of coconut or copra | 12,341,103 | 9 | Malaysia | 20,478,733 |
| 10 | Fish, frozen, excluding fish fillets | 6,409,088 | 10 | Italy | 15,133,240 |

**Source:** Mindanao Development Authority

Davao Region's total Cavendish banana production increased to over 2.8 million MT in 2009 growing at a rate of 14.3% over the last four years. The growth was largely contributed by the demand from Eastern Asia and the Middle East. The area planted/harvested to Cavendish banana also grew 6.6 percent. The issuance of Executive Order 807 in 2009, repealing the law that restricted the area planted to export banana, had likely contributed to its growth despite threats related to agrarian reform and the global financial crisis that started in 2007. The banana industry is one of the most developed supply chain industries among the region's priority products. Mainly exported fresh, there is a growing market for ready-to-eat banana products in USA, Canada and Australia, as served by one of the survey respondents. A current challenge to the banana industry is the Panama disease (Fusarium wilt), which threatens the health of banana plantations in Bukidnon, Davao del Norte, and Compostela Valley. Efforts are ongoing to find a cure for this disease and to develop disease-resistant varieties.

Coconut production in the region also performed well, though with a slower annual growth of 1.9%, translating to a production volume of 2.8 million MT in 2010. Exported coconut products include coconut oil, desiccated coconut, activated carbon, copra meal, coco coir, coco shell and coco chemicals. The survey in Davao included 5 processors of coconut products for export and domestic markets, including coconut syrup (11.2 MT exported monthly), coco sugar and teas, xylose crystal, molasses, coco shell charcoal, activated carbon, charcoal briquettes, and desiccated coconut.

An emerging commodity is dried and fermented cocoa beans where Davao is producing through contract growing and corporate farming. Cocoa is also feasible for intercrop with banana and coconut. There are already presence of foreign buyers from United States and Europe who are seriously supporting this industry through setting up of nurseries, tie-ups with individual and cooperative producers and the like. According to the Bureau of Agricultural Statistics (BAS), Davao Region produces 60-70% of the country's cocoa production.

The export trading route from Davao Port is via Manila/Singapore if the products are bound for USA, Europe and Middle East. For products heading to Japan and Korea, the route is Davao Port to Manila or direct to destination ports in Tokyo and Korea. There are also ships calling at some of the companies' private ports (e.g., cement going directly to Micronesia/Palau). Japan, USA, the Netherlands, China, Korea, Singapore, Iran, Switzerland, Malaysia and Italy are Davao's top 10 export markets.

Like Davao, the SOCCSKSARGEN region (Region XII) is also a major agricultural area. However, fishing is still its biggest industry especially in General Santos. In 2010, Region XII's top 10 exports brought in earnings of USD570 million, with prepared tuna products accounting for 37% (see Table 3.6). Coconut and its byproducts come in second at 19% share, followed by frozen tuna (17%), pineapple products (12%), fruit and vegetable juices (8%), fresh/ chilled/ frozen fish meat (3%), and oil palm (0.5%). The combined FOB value of these commodities accounted for 22% of total Mindanao exports.

**Table 3.6** – Top Ten Exports and Principal Export Markets of SOCCSKSARGEN Region, 2010

| Export | | | Export market | | |
|---|---|---|---|---|---|
| Rank | Commodity | FOB value in US$ | Rank | Country | FOB value in US$ |
| | **Total Exports** | **616,631,982** | | **Total Exports in Top Markets** | **509,843,957** |
| | % to Mindanao Exports | 22.2 | | | |
| | **Top Ten Exports** | **569,754,245** | | | |
| 1 | Tuna, prepared or preserved | 213,079,284 | 1 | United States of America | 201,735,661 |
| 2 | Coconut (copra), palm kernel or babassu oil, crude | 109,319,759 | 2 | Netherlands | 63,293,213 |
| 3 | Pineapples, prepared or preserved | 68,323,819 | 3 | Japan (excludes Okinawa) | 44,503,625 |
| 4 | Tuna, frozen | 95,419,177 | 4 | Germany | 43,997,469 |
| 5 | Fruit juices (including grape must) and vegetable juices | 43,985,915 | 5 | UK Great Britain and N. Ireland | 41,304,352 |
| 6 | Fish fillets and other fish meat (whether or not minced), fresh, chilled or frozen | 16,743,885 | 6 | Spain | 27,567,132 |
| 7 | Fish, dried, salted or in brine; smoked fish, whether or not cooked before or during the smoking process; flours, meals and pellets of fish, fit for human consumption | 7,399,279 | 7 | Italy | 24,884,002 |
| 8 | Oil-cake and other solid residues of coconut or copra | 7,364,971 | 8 | China, People's Rep. of | 24,836,802 |
| 9 | Food preparations not elsewhere specified or included | 5,457,406 | 9 | Malaysia | 21,179,418 |
| 10 | Palm oil and its fractions, crude | 2,660,750 | 10 | Canada | 16,542,283 |

**Source:** Mindanao Development Authority

Today, six of the seven tuna canneries in the Philippines are located in General Santos (the other one is in Zamboanga). Also, 12 of the more than 15 frozen tuna processors in the Philippines are in the city, which has been called the "Tuna Capital of the Philippines." Most of the canned tuna and other processed tuna products are exported to USA and European countries.

Coconut and oil palm farms and plantations are widespread in the region. Coconut is planted in almost all provinces in the region while palm oil is concentrated in Sultan Kudarat. It should be noted that there are also major banana farms in General Santos and Alabel, Sarangani Province. Banana, however, is not indicated as among the top ten exports from the region. The main reason is that bananas from this region are mostly trucked in container vans to Davao and shipped out through the Davao Port. Some major business developments that can potentially increase banana exports either through General Santos or Davao ports are the planned establishment of a 500 ha banana plantation in Kiamba, Sarangani Province and another 5,000 ha banana plantation in Maguindanao Province.

Similar to the Davao Region, SOCCSKSARGEN's major export markets are USA, Europe, Japan, China, Malaysia and Canada.

Rice is the number one imported product in Davao Region in the last four years. The Department of Agriculture (DA) attributed this to the decline in rice production in Mindanao because of the dry spell, pest infestation and shifting to industrial crops and commercial fruits. Other imported products are agricultural inputs (insecticides, fungicides, herbicides, etc.), fertilizers, paper and packaging materials, petroleum products, copper ores, and chemicals (see Table 3.7).

Vietnam and Thailand are the main sources of imported rice. Fertilizer and agricultural inputs mainly come from USA. The cement plant in Davao—which has its own private port—is sourcing gypsum from Thailand, clinker from Vietnam, and coal from Sulawesi, Indonesia. China is the source of various items including thermal paper.

**Table 3.7** – Top Ten Imports and Principal Sources of Import of Davao Region, 2010

| Import | | | Import source | | |
|---|---|---|---|---|---|
| Rank | Commodity | FOB value in US$ | Rank | Country | FOB value in US$ |
| | **Total Imports** | **701,874,443** | | **Total Imports in Top Sources** | **549,372,561** |
| | % to Mindanao Imports | 54.0 | | | |
| | **Top Ten Imports** | **460,743,885** | | | |
| 1 | Rice | 124,772,319 | 1 | United States of America | 92,857,863 |
| 2 | Uncoated craft paper and paperboard, in rolls or sheets | 85,325,617 | 2 | Vietnam | 76,649683 |
| 3 | Petroleum oils and oils obtained from bituminous minerals, other than crude | 60,047,197 | 3 | China, People's Rep. of | 73,059,917 |

| Import | | | Import source | | |
|---|---|---|---|---|---|
| Rank | Commodity | FOB value in US$ | Rank | Country | FOB value in US$ |
| 4 | Semi-chemical fluting paper | 37,784,911 | 4 | Thailand | 65,485,982 |
| 5 | Insecticides, rodenticides, fungicides, herbicides, anti-sprouting products and plant-growth regulators | 35,469,701 | 5 | Singapore | 64,917,322 |
| 6 | Urea, whether or not in aqueous solution | 31,836,495 | 6 | Japan (excludes Okinawa) | 51,951,461 |
| 7 | Copper ores and concentrates | 28,621,751 | 7 | Australia | 48,244,297 |
| 8 | Polymers of ethylene, in primary forms | 23,107,222 | 8 | Indonesia (includes West Papua) | 30,296,724 |
| 9 | Oil-cake and other solid residues | 18,862,632 | 9 | Korea, Rep. of (South) | 27,320,371 |
| 10 | Potassium chloride | 14,916,040 | 10 | New Zealand (excludes W. Samoa) | 18,588,941 |

**Source:** Mindanao Development Authority

The SOCCSKSARGEN Region imports some of the same commodities as Davao's, including rice and agricultural inputs. In addition, the region imports frozen fish, copra, corn, steel products (mainly for tin cans), and industrial equipment like cranes (see Table 3.8).

**Table 3.8** – Top Ten Imports and Principal Sources of Import of SOCCSKSARGEN Region, 2010

| Import | | | Import source | | |
|---|---|---|---|---|---|
| Rank | Commodity | FOB Value in US$ | Rank | Country | FOB Value in US$ |
| | **Total Imports** | **196,648,930** | | **Total Imports in Top Sources** | **168,556,406** |
| | % to Mindanao Imports | 15.1 | | | |
| | **Top Ten Imports** | **158,158,410** | | | |
| 1 | Rice | 52,938,824 | 1 | Vietnam | 49,759,963 |
| 2 | Fish, frozen | 43,055,617 | 2 | Japan (excludes Okinawa) | 25,840,564 |
| 3 | Copra | 19,994,262 | 3 | Papua New Guinea | 21,756,915 |
| 4 | Maize (corn) | 18,603,334 | 4 | Taiwan, Rep. of China | 15,874,676 |
| 5 | Flat-rolled products of iron or non-alloy steel | 6,193,836 | 5 | Argentina | 15,193,223 |
| 6 | Animal or vegetable fats and oils and their fractions | 4,823,760 | 6 | Thailand | 9,032,339 |
| 7 | Ships' derricks; cranes, including cable cranes; mobile | 4,335,221 | 7 | Korea, Rep. of (South) | 8,769,171 |
| 8 | Insecticides, rodenticides, fungicides, herbicides, anti-sprouting products and plant-growth regulators | 3,251,750 | 8 | Indonesia (includes West Papua) | 8,214,591 |
| 9 | Flat-rolled products of iron or non-alloy steel, of a width of | 2,760,805 | 9 | Malaysia | 7,188,236 |
| 10 | Oil-cake and other solid residues | 2,201,001 | 10 | China, People's Rep. of | 6,926,728 |

**Source:** Mindanao Development Authority

Vietnam and Thailand are also the sources of rice imports. Frozen fish comes from Papua New Guinea. Copra comes from Indonesia. Sources for other major imports are Japan, Taiwan, Argentina, Korea, Malaysia and China.

Logistics chain and port usage

Table 3.9 presents a summary of the 2011 exports cargo handling and logistics characteristics of the cargo stakeholders in the Davao/ General Santos survey. In terms of average monthly tonnage, the major exports are wood flooring and wall panels, fresh and processed fruits (mainly pineapple, Cavendish banana and mangoes), crude coconut oil and palm oil, rubber, fresh frozen and processed fish and seafoods, and packaging materials, among others. The combined tonnage of these export products totaled almost 90,000 MT a month.

**Table 3.9** – Summary of Export Logistics of Cargo Stakeholder, 2011 (Davao and General Santos)

| Commodity | | | Avg. monthly tonnage (ton) | Type of packing | Port | | |
|---|---|---|---|---|---|---|---|
| SITC | Commodity classification | Specific products of stakeholders | | | Origin | Transshipment | Destination |
| 03 | Fish, Crustaceans, mollusks and preparations | Canned tuna, frozen tuna products, smoked tuna, frozen skipjack, milkfish, processed and other seafood products | 7,427.5 | Boxes, bins, cases, cartons, palletized | General Santos, Davao, Cagayan de Oro | Manila, Singapore, Korea, Shanghai, Hong Kong. | Europe, Singapore, Japan, USA, China, Israel, Australia |
| 04 | Cereal & preparations | Corn seeds | 1.7 | sacks | General Santos | Manila | Vietnam, Indonesia |
| 05 | Vegetables and Fruits | Fresh fruits (pineapple, banana, mango, Cavendish banana, papaya), canned pineapple juices, dried fruits, processed banana, individually quick frozen (IQF) products | 22,320.3 | Basically cartons and boxes. Few container-ized. | General Santos and Davao | Singapore, Kaohsiung, Hong Kong, Port Klang Malaysia, Europe, China | Japan, Korea, New Zealand, Middle East, China, Asia, Russia, USA, Malaysia, Middle East, Australia, Canada, Hong Kong, Middle East, Europe |
| 07 | Coffee, tea, cocoa, spices, and manufactures | Tablea, cacao, coco sugar, coco vinegar | 0.2 | cases, boxes, corrugated cartons | General Santos | Manila | Hong Kong |
| 08 | Feedstuff for animals | Pineapple silage, fish meal | 122.5 | Sacks, bags | General Santos | | Japan |
| 09 | Misc. Edible Products & preparations | Coco syrup, foodstuffs | 1,011.2 | Drums, cartons, sacks | Cagayan de Oro, Davao, General Santos | Shanghai, Singapore, Hong Kong, Manila | USA, Europe, Australia |
| 24 | Cork & wood | Coco charcoal | 242.0 | sacks | General Santos | Manila | China |
| 28 | Metalliferous ores and metal scrap | Copper ore, scrap metal, scrap tin cans | 1,712.0 | Containers, sacks, bulk | Davao | Manila, Singapore, Korea, Hong Kong, Shanghai, Malaysia | China, Taiwan, USA, Europe, Australia |

| Commodity | | | Avg. monthly tonnage (ton) | Type of packing | Port | | |
|---|---|---|---|---|---|---|---|
| SITC | Commodity classification | Specific products of stakeholders | | | Origin | Transshipment | Destination |
| 32 | Coal, Coke and Briquettes | Activated carbon, charcoal briquettes | 1,880.0 | Sacks, and containers | Davao | Singapore, Malaysia (Tanjung Pelepas) | Europe, China |
| 43 | Processed animal & vegetable oils & fats | Crude coconut oil, Coco acid oil, Palm acid oil | 10,350.0 | Bulk, drums, cartons, crates | General Santos, Davao, Cagayan de Oro | | Europe, Pakistan, China |
| 59 | Xylose Crystal | Xylose crystal | 386.4 | Containers | Davao | Hong Kong | Incheon, Qingdao, Ningbo, Osaka |
| 62 | Rubber | Rubber | 10,000.0 | Bulk | Zamboanga, Cagayan de Oro | Tanjung Pinang, Shanghai, Singapore | Europe, Malaysia, China |
| 63 | Cork and wood manufactures | Wood flooring, wall panels | 27,332.0 | Containers | Davao | Shanghai/ Busan | Tokyo |
| 66 | Cement | Cement | 1,000.0 | Jumbo Bags 40 kgs | Davao | | Micronesia/Palau |
| 69 | Manufactures of metal | System kitchen | 400.0 | 40 DHC containers | Davao | Shanghai/ Busan | Tokyo |
| 72 | Specialized machinery | Cannery equipment (conveyors, tables, bins, etc.) | 25.0 | bulk laden | General Santos | | Papua New Guinea |
| 74 | Other industrial machinery | Other industrial machinery and parts | 130.0 | bulk laden | General Santos | | Papua New Guinea, Bitung |
| 89 | Misc. manufactured articles | Packaging materials (labels, hang tags, stickers, corrugated cartons), cords, photo frames, plastic cups, plastic pallets | 5,126.7 | palletized, wrapped, sacks, boxes, cartons, container | General Santos | Davao, Manila, Singapore, China (Kaohsiung), Hong Kong, Malaysia (Port Klang) | Madang Papua New Guinea, China, Taiwan, Spain, USA |
| TOTAL | | | 89,467.5 | | | | |

**Source:** Davao and General Santos Stakeholder Interviews, Survey Team, 2012

Many of the products are shipped in containers in a variety of packaging, including cartons, boxes and cases (for fresh and processed fruit products); boxes, cartons and pallets (for processed fish and seafoods); bins (for fresh frozen fish); big drums/ barrels (for coco and palm oil, coco syrup); and jumbo bags and sacks (for activated carbon, charcoal briquettes, cement and feeds). Other products like plastic pallets, furniture, wood flooring, wall panels, etc. are either bundled or stacked in containers without any special packaging. Crude coconut oil is shipped as liquid bulk while rubber and machinery are transported as dry bulk.

In terms of origin-destination, export cargoes from Davao and General Santos are usually transshipped to Manila, Singapore, Hong Kong, Kaohsiung, Shanghai, Busan, Malaysia (Tanjung Pelepas, Tanjung Pinang, Port Klang) and China onwards to their final export destinations in USA, Europe, Japan, Korea, Taiwan, the Middle East, Australia and Canada. Other products are directly shipped without requiring any transshipment, such as crude coconut oil to Europe, Pakistan and

China, cement to Palau/ Micronesia, machineries to PNG and Bitung, and feeds to Japan. Depending on the destination, delivery time greatly varies from as few as 3 days to as long as 60 days.

The combined import volume of the Davao and General Santos cargo stakeholders in 2011 was 81,147 MT (see Table 3.10). Among the major imports are coal, clinker, gypsum, packaging materials (e.g., paper, kraft liner board, paper rolls, thermal paper, glass jars), copra, sugar, fertilizers, soya bean meal, corn seeds, rice seeds, wheat, machinery and spare parts, tin plates/ rolls, and general cargoes (unspecified). Like export products, these import commodities are packed in various forms including boxes, cartons, cases, bags, sacks, bundles, and drums/pails. Coal is imported in dry bulk.

**Table 3.10** – Summary of Import Logistics of Cargo Stakeholders, 2011 (Davao and General Santos)

| Commodity | | | Avg. monthly tonnage (ton) | Type of packing | Port | | |
|---|---|---|---|---|---|---|---|
| SITC | Commodity classification | Specific products of stakeholders | | | Origin | Transshipment | Destination |
| 03 | Fish, Crustaceans, mollusks and preparations | Canned tuna, frozen tuna products, smoked tuna, frozen skipjack, milkfish, processed and other seafood products | 23.0 | Boxes (frozen) | Jakarta & Bitung of Indonesia | Jakarta | General Santos |
| 04 | Cereal & preparations | Corn seeds, rice seeds, wheat | 839.3 | Sacks, cartons | India, USA, Argentina | Singapore, Hong Kong | General Santos |
| 05 | Vegetables and Fruits | Agricultural products (onions, garlic, sugar), dates | 11.0 | Boxes, break bulk, sacks | Dubai, China | Singapore, Manila | Manila, General Santos |
| 06 | Sugar | Sugar | 1,750.0 | bags, sacks | Laem Chabang Port Thailand | Singapore | General Santos |
| 07 | Black pepper | Black pepper | 0.8 | jute sacks | Hanoi, Kuala Lumpur | Manila | General Santos |
| 08 | Soybean meal | Soybean meal | 1,200.0 | cartons | USA, Argentina | Singapore, Hong Kong | General Santos |
| 09 | Misc. Edible Products & preparations | Vegetable broth, ingredients | 13.2 | Sacks, bags | USA, Canada | Korea | General Santos |
| 29 | Crude Vegetable Material n.e.s. | Copra | 4,000.0 | Bulk | Indonesia (Tahuna), Papua New Guinea | | General Santos |
| 32 | Coal | Coal | 24,000.0 | Loose | Indonesia | | Davao |
| 33 | Lubricants | Lubricants | 85.0 | drums, pails (gallons/litters) | Singapore | | General Santos, Davao |
| 43 | Processed Animal & Vegetable Oils & Fats | Soya oil, sunflower oil | 100.0 | Cartons, flexi bags | Malaysia (Pasir Gudang) | Singapore | General Santos |
| 56 | Fertilizers other than group 272 | Doufos fertilizer, fertilizer and other related materials | 2,334.0 | Bags, sacks | Indonesia, China (Xiamen) | Singapore | General Santos |

| Commodity | | | Avg. monthly tonnage (ton) | Type of packing | Port | | |
|---|---|---|---|---|---|---|---|
| SITC | Commodity classification | Specific products of stakeholders | | | Origin | Transshipment | Destination |
| 59 | Dry ice production materials (liquid carbon dioxide) | Dry ice production materials (liquid carbon dioxide) | 100.0 | tanks | China, Singapore, Taiwan, USA | Manila, Singapore | Cebu and Davao |
| 64 | Paper & paper manufactures | Paper, kraft liner board, paper rolls, thermal paper, plastic resins, semi chem reels | 14,208.0 | Rolls, palletized, bags, | USA, Korea, Finland, China | Singapore | General Santos |
| 66 | Non-metallic mineral manufactures, n.e.s. | Packaging materials and imported glass jars, clinker, gypsum | 30,004.9 | Cases, boxes, cartons, bulk | Bangkok, Vietnam, Thailand | Manila | General Santos, Davao |
| 69 | Manufactures of metals n.e.s. | Tin plate sheets, tin free steel strips and ends/ lids, coated plates, tins, empty cans | 434.0 | Skid (metal strap bundled), boxes, cartons | Indonesia (Jakarta), Malaysia, Thailand | Singapore, Papua New Guinea | General Santos |
| 74 | Other industrial machinery & parts | Used machines, bottle washers, equipment, spare parts), machine parts | 831.3 | Bulk, cartons, boxes, containers | Malaysia, Korea, Middle East | Singapore, Hong Kong | Davao |
| 78 | General cargoes | General cargoes | 1,000.0 | boxes | China, Japan, Korea | China, Japan, Korea | General Santos, Davao, Cagayan de Oro |
| 82 | Furniture & parts thereof | Furniture, home decors | 10.0 | Boxes, bulk | Indonesia (Jakarta) | Manila | General Santos |
| 89 | Miscellaneous manufactured articles n.e.s. | Packaging materials, raw materials (paper, sticker paper), plastic tub, nets, pouches, seed bags, sprayers, vacuum packs, plastic bottles and other packaging materials, gypsum, glues, paints, ceramics, additives | 202.7 | Cartons, rolls, reels, sacks, bulk, bundles, palletized, boxes | China, Japan, Korea, Vietnam, Malaysia, USA, Thailand | Singapore, Manila, Taiwan | General Santos, Davao |
| TOTAL | | | 81,147.2 | | | | |

**Source:** Davao and General Santos Stakeholder Interviews, Survey Team, 2012

The major origin ports for the stakeholders' imports into General Santos are Indonesia (for coal, copra, frozen fish, duofos fertilizer, furnitures), Vietnam (for clinker), Thailand (for gypsum and sugar), Japan, China, USA, PNG, Taiwan, Korea, and Singapore. Manila and Singapore are the most common transshipment ports to General Santos and Davao Ports. Some cargoes are directly shipped to General Santos and Davao from the supplier countries. Copra is directly shipped from Tahuna and PNG to the private port of the General Santos crushing plant.

Average monthly tonnage of imports specifically from Indonesia includes 24,000 MT of coal (not specified from which Indonesian port); 2,000 MT of copra (from Tahuna); 93 MT of tin plate sheets, tin free steel strips and ends/lids (from Jakarta); 60 MT of coated steel plates and ends/ lids (from

Jakarta); 12 MT of frozen tuna products (from Jakarta); and 5 MT of furniture (from Jakarta). A company in Davao presently sources its thermal paper supply from China, though they believe that thermal paper in Indonesia is cheaper, if only transport costs can be competitive.

Warehouses and trucks are the most common logistics assets owned and/or rented by the companies. Other logistic assets are containers, container chassis, tractor heads and reefer vans. The bigger companies with relatively larger operations have more logistics assets, such as the pineapple processor with 134 trucks and 18 sets of tractor heads, container chassis and containers; the banana exporter with 600 trucks and 1,000 sets of tractor heads/ chassis/ containers; the activated carbon plant and fish processor with 15 warehouses each; the cement plant with 115-120 trucks; another banana company with 20 containers and many trucks; the cargo forwarder with 50 container chassis and 20 tractor heads; and the mango company with 3-4 reefer vans. Other logistics assets include cargo handling equipment such as forklifts. A few own their private ports.

Davao cargo stakeholders

Most (78%) of the stakeholders in the Davao Region use the Davao Port (Sasa Wharf) as the primary entry and exit point for their cargoes. A few also use the General Santos Port and Cagayan de Oro Port (in Northern Mindanao), mainly because they have branch offices in those areas, while still another few use their private ports located near the Davao Port. The Northern Mindanao cement plant ships cement to SOCCSKSARGEN via the General Santos Port, particularly when the Davao office runs short of cement stocks for delivery to SOCCSKSARGEN.

The shippers/ forwarders with a fixed number of deliveries in a month use the Davao Port at least seven times in a month. Those that ship more and less during peak and off-peak, respectively, use the Davao Port an average of four times a month during peak and between two to three times during off-peak months.

The loading and unloading of cargoes are usually done at the operations site, which to some companies are also their main offices. The plants of some of the shippers/ manufacturers are located as far as Davao del Sur, some 86 kilometers from Davao City. It may be noted that Davao del Sur is next to the province of Sarangani beside General Santos, roughly the same distance from Davao del Sur's capital city.

About 93% of the cargoes of the Davao stakeholders are containerized and the rest are bulk or break bulk/ loose. This coincides with the nature of the Davao Port's cargo throughput which is 90% containerized.

The Davao stakeholders prefer to use the Davao Port for the following main reasons:

1) *The Davao Port is the nearest port and nearer to them compared to the General Santos Port.*

   The distance and travel time between the stakeholders' plants/ offices and the Davao Port are shorter, making logistics costs cheaper. The respondents, however, were not able to provide the cost comparison between the Davao and General Santos Ports.

2) *The Davao Port meets their basic shipping requirements*.

   Among others, the port has reefer facilities, container yards, marshaling area, and container freight station. The services at the port are cargo handling, pilotage, porterage, tug assistance, watering, shore reception facility services, vessel repair/ maintenance, bagging, and shipping agency. The offices and/or representatives of the Customs, Immigration, Quarantine and Security (CIQS) agencies are also located within the port area. One of the respondents whose activated carbon plant is located in Toril, Davao City's last town next to the Davao del Sur Province, tried shipping out from General Santos. Since gantry cranes are not available at the General Santos Port, the company chose to use the Davao Port. The cement manufacturer, although mainly operating through its private port in Davao, is also a client at General Santos Port. They noted the poor service of the General Santos port handler, maybe because it is the sole handling company and has no competition, unlike in Davao Port where there are two port handlers. They also expressed the need to revisit the port layout and maybe seriously consider port expansion. One of the Davao forwarders also said that port charges in the General Santos Port are more expensive than those in Davao and Cagayan de Oro Ports (they did not provide any cost comparison).

3) *Davao Port is the only option within the Davao Region*.

   Davao Port is the base port in Davao Region. There is one Terminal Management Office (TMO) in Mati, Davao Oriental and others are municipal and private ports. The municipal ports are located in all provinces except for Compostela Valley. The private ports are owned by companies engaged in banana, cement, and oils.

The Davao stakeholders are generally satisfied with the Davao Port, although some consider the following as medium to major problems:

1) Port congestion - The congestion at the port is causing delays in loading and shipment of cargoes. Mother vessels cannot dock at berths and some docking areas are not working. The transit time of goods is, therefore, longer because they have to tranship the goods from port to mother vessel.
2) Davao Port has no 5-10 footer containers and has limited 20-footer reefer containers - A few stakeholders, like the activated carbon manufacturer, would like to have smaller containers

because they have clients with minimal orders. The fresh fruit product shipper noted the limited reefer containers at the port.

3) Slow customs clearance - The Bureau of Customs has gone into computerized systems. The system malfunction is causing slow processing of customs clearance.
4) Poor condition of access road - The port congestion is also attributed to damaged concrete pavement of roads outside the port as well as congested access road to the port.

Generally, the Davao stakeholders recommended port rehabilitation/ expansion to address initially the port congestion problem at the Davao Port.

<u>General Santos cargo stakeholders</u>

Majority of the SOCCSKSARGEN cargo stakeholders are headquartered in the region, mostly in General Santos. Some are branch offices also located in the area. The General Santos Port (Makar Wharf) is the preferred port for most (90%) of them for the following reasons:

1) General Santos Port is the nearest port to their plant and/or offices, which makes it the most accessible and convenient form of shipping transport in the area. It is the base port in the SOCCSKSARGEN region.
2) Because of its proximity and accessibility, it is cheaper (in terms of logistics costs) for the stakeholders to use the General Santos Port. The pineapple processor has its own private port but prefers to use Makar Wharf due to lower cost considerations.
3) For forwarders, General Santos Port is the preferred port of their clients.

The number of deliveries made at the General Santos Port varies among the stakeholders, usually depending on the size and nature of operations of the shippers. During peak months, their average deliveries range from less than once a month to as many as 100 times a month especially for highly perishable products. The fish processors and pineapple processor deliver their cargoes more frequently than the others. The range of deliveries goes down to 0-30 times a month during off-peak season.

Aside from the General Santos Port, some of the General Santos cargo stakeholders also use the Davao Port (21% of the stakeholders) and Cagayan de Oro Port (3%) mainly because it is cheaper for them to do so. Davao and CDO port charges are less expensive than those of General Santos port. The Davao Port also has more direct shipping services to export destinations of some of the shippers. One trader particularly finds the Davao Port more adept in handling mineral ore cargo. One agricultural producer also uses the Subic Port (north of Manila) because they co-share shipments with Subic-based shippers. The crude coconut oil manufacturer has its own private port which it currently uses for most of its operations.

The General Santos Port users are generally satisfied with their port usage in terms of availability of shipping type, ship call frequency, cargo capacity, shipping time and service quality. However, they cite some problems and areas needing improvement particularly on the relatively high port charges and the slow customs clearance. Some also complain about the quality of port services, citing a monopoly since there is only one port operator currently providing these services. A few stakeholders mentioned additional problems such as the presence of fixers/ brokers and some corruption at the port (which adds to their logistics costs), the delays and/or intermittent schedule of ships sometimes, lack of containers and container chassis, and old vessels.

General Santos-based shippers who also use the Davao Port cited the congestion at the Davao port, including its access roads, as the major problem there. Some also mentioned high port charges and slow customs clearance as significant problems in port usage.

For both the General Santos and Davao Ports, some shippers are concerned with frequent late arrival of ships due to shutouts in Singapore where loading/unloading prioritization depends on the cargo volume. Cargo space allocation is dependent on excess slot after vessels sail out from the last port of loading, and by the time the ships call on General Santos or Davao, there is not much cargo space available.

<u>Logistics costs</u>

Not all the cargo stakeholders provided information on their logistics costs. Some simply could not provide estimates as their brokers, shipping agents and forwarders take care of the detailed handling of their cargoes. For those who did provide information, the logistics costs vary widely, depending on the specific shipping routes and type of cargo. Some trends and patterns, though, can be derived from the partial data.

For export cargo either directly shipped or transshipped to Asian destinations (e.g., China, Vietnam, Jakarta, Korea, Taiwan), the indicative ocean freight service cost ranges from USD400-700 per TEU (see Table 3.11). Costs are relatively higher for cargo going to Japan, particularly for fresh products (e.g., mangoes, bananas, frozen fish) which are transported in refrigerated containers.

Average shipping costs for imports across similar routes appear to be higher than those for exports, ranging from USD700-900 per TEU.

**Table 3.11** – Indicative Export and Import Logistics Cost of Selected General Santos/ Davao Stakeholders, 2011

| Commodity | Avg. monthly tonnage (ton) | Port of origin | Trans-shipment port | Port of destination | Total land transporta-tion cost (USD) | Ocean freight service cost (USD) | TOTAL LOGISTICS COST (USD) | Remarks |
|---|---|---|---|---|---|---|---|---|
| **EXPORTS** | | | | | | | | |
| Copper ore | 20 | Davao | Manila, Singapore | Ningbo China | 100 | 600 | 700 | per TEU |
| Packaging materials (labels, hang tags, stickers, corrugated cartons) | 100 | Gensan | Davao, Manila, Singapore | Madang Papua New Guinea | 238 | 2,000 | 2,238 | assume 40 footer |
| Corn seeds | 1.7 | Gensan | Manila | Vietnam, Indonesia | 119 | 600 | 719 | per TEU |
| Frozen tuna products (cubes, fillet, steaks, loins, sashimi/sushi packs) | 27 | Gensan | Kaohsiung, Singapore | Los Angeles | 107 | 1,140 | 1,247 | assume TEU refrigerated |
| Yellow fin tuna | 40 | Gensan | Manila | USA | 107 | | 1,247 | could be same as above |
| Activated carbon | 400 | Davao | Tanjung | Korea | 131 | 570 | 701 | per TEU |
| Wall panels | 500 | Davao | Shanghai/ Busan | Tokyo | 286 | 715 | 1,000 | per TEU |
| Scrap tin cans | 350 | General Santos City | Manila | Taiwan | 71 | 381 | 452 | per TEU |
| Fresh Mangoes | | Davao | - | Tokyo | 400 | 2,300 | 2,700 | assume 40 footer refrigerated |
| Fish aggregation device (payao) parts | 130 | Gensan | - | Papua New Guinea, Bitung | | | 2,137 | assume 40 footer |
| Xylose Crystal | 188 | Davao | - | Incheon | 402 | 500 | 902 | per TEU |
| Xylose Crystal | 72 | Davao | - | Qingdao | 82 | 320 | 402 | per TEU |
| Xylose Crystal | 108 | Davao | - | Ningbo | 402 | 320 | 722 | per TEU |
| Xylose Crystal | 18 | Davao | Hong Kong | Osaka | 402 | 630 | 1,032 | per TEU |
| Fresh Mangoes | | Davao | - | Shanghai | 400 | 1,900 | 2,300 | assume 40 footer refrigerated |
| System kitchen | 400 | Davao | Shanghai/ Busan | Tokyo | 286 | 715 | 1,000 | per TEU |
| Fresh Mangoes | | Davao | - | Kobe | 400 | 2,300 | 2,700 | assume 40 footer refrigerated |
| Fresh Banana | 80 | Davao | Tanjung Pelepas, Malaysia | Middle East | 53.949 (inclusive of ocean freight) | | 1,124 | assume 48 containers per year |
| Activated carbon | 400 | Davao | Singapore | Europe | 131 | 2,100 | 2,231 | per TEU |
| Wood flooring | 26,832 | Davao | Shanghai/ Busan | Tokyo | 286 | 715 | 1,000 | per TEU |
| **IMPORTS** | | | | | | | | |
| Packaging materials | 1 | Ningbo China | Singapore - Manila | Davao | 100 | 600 | 700 | per TEU |
| Oil | 20 | Pasir Gudang Malaysia | Singapore | Gensan | 300 | 3,300 | 3,600 | assume 40 footer |
| Raw materials (paper, sticker papers) | 140 | Japan, Korea | Manila | Gensan | 208 | 729 | 938 | per TEU |
| Dry ice production materials (liquid carbon | 100 | China, Singapore, | Manila | Cebu and Davao | | | 1,500 | per TEU |

| Commodity | Avg. monthly tonnage (ton) | Port of origin | Trans-shipment port | Port of destination | Total land transporta-tion cost (USD) | Ocean freight service cost (USD) | TOTAL LOGISTICS COST (USD) | Remarks |
|---|---|---|---|---|---|---|---|---|
| dioxide) | | Taiwan | | | | | | |
| Glues, kitchen accessories, paints, ceramics, additives and packaging boxes | 192 | Tokyo | - | Davao | 571 | 1,429 | 2,000 | per 40 footer |
| Grow more fertilizer | 912 | USA | Singapore/ Hong Kong | Davao | 518 | 1,619 | 2,136 | per TEU |
| Equipments | 20 | Anywhere in Asia | - | Davao | | | 1,089 | per TEU |
| Ends/lids | 57.5 | Jakarta, Thailand | Singapore | Gensan | | | 714 | per TEU |
| Duofos fertilizer | 1122 | Indonesia | Singapore | Davao | 424 | 552 | 976 | per TEU |

Note: The "Remarks" column includes some assumptions made by the Survey Team in computing/ interpreting the cost data provided by the stakeholders.

**Source:** Davao and General Santos Stakeholder Interviews, Survey Team, 2012

Potential trading activities on the General Santos-Bitung shipping route by 2015

The General Santos/ Davao stakeholders projected some 1,370,000 MT of exports and 55,000 MT of imports for 2015. From these projections and the stakeholders' opinions on their potential use of the General Santos-Bitung shipping route, the following tables present a list of export and import commodities, respectively, and possible trading volumes across the route.

Among the major potential exports across the route are charcoal, activated carbon, fresh and processed fruits, packaging materials, beverage, equipment, fishing supplies and materials, and fish and seafood products. Potential export tonnage of these products in 2015 is at least 936 MT/month (see Table 3.12).

**Table 3.12** – Projected Export of General Santos/ Davao Stakeholders as Potential Cargo for the General Santos – Bitung Route, 2015

| 2015 projected export | | | | | | | 2011 trade |
|---|---|---|---|---|---|---|---|
| Commodity | Avg. monthly tonnage (ton) | Type of packing | Port of origin | Transshipment port | Port of destination | Consumption region | |
| Processed seafoods | 3.0 | cartons | Gensan | | Bitung | Indonesia | Handled exports of 0.5MT/mo to China via Manila. |
| Whole round tuna | 25.0 | Bulk, cartons | Gensan | Bitung | Surabaya | | In 2011, company exported various cargo including 60MT/mo of smoked tuna, 10MT/mo of fresh frozen tuna, 50MT of other seafoods to Japan and USA via MNL, and imported 3MT/mo of plastic tubs from Japan. |

| 2015 projected export | | | | | | | 2011 trade |
|---|---|---|---|---|---|---|---|
| Commodity | Avg. monthly tonnage (ton) | Type of packing | Port of origin | Transshipment port | Port of destination | Consumption region | |
| General cargoes (ice cream, generator sets, cold storage facility) | *Not specified* | | Gensan | | Tahuna, Bitung | Indonesia | Exported 20MT/mo of copper ore and 1MT/mo of packaging materials to China via Davao/ Manila/ Singapore. |
| Corn seeds | 8.3 | 50-kg sacks | Gensan | | Bitung | Indonesia | Exported 1.7MT/mo to Indonesia and Vietnam via GSC-MNL-JKT. |
| Fresh Cavendish bananas | (937.5) | 13.5 kg Boxes | Unifrutti Wharf (private port in Maguindanao) | | Bitung | ASEAN | Exported 700MT/mo to Tokyo, Japan via its private port. They are interested to explore the ASEAN market including Indonesia. |
| Dried fruits products (mango, pineapple, papaya) | *Not specified* | boxes | Gensan | | Bitung | Indonesia | Exported 0.1MT/mo to Japan, 1.1MT/mo to Malaysia, and 17.1MT/mo to USA via Manila. Wants to explore Indonesian market. |
| Fresh Mangoes | 7.0 | Standard 5kg Boxes | Davao | | Bitung | Indonesia | Exported to Kuala Lumpur via Manila. Wants to explore Indonesian market. |
| Fruit jams, jellies and juices, coco sugar, coco vinegar | *Not specified* | cases, boxes, corrugated cartons | Gensan | | Bitung | Indonesia, BIMP-EAGA | Exported 0.2MT/mo to Hong Kong via Manila. Wants to explore the BIMP-EAGA market thru the Gensan-Bitung route. |
| Processed fruits (jams, jellies, etc.) | *Not specified* | | | | Bitung | Indonesia, BIMP-EAGA | Currently expanding its processed fruits business (jams, jellies, etc.) |
| Dates cola beverage | 160.0 | Aluminum cans in boxes | Gensan | | Bitung | Indonesia, ASEAN | Currently developing dates-enhanced food and beverage products. |
| Coco charcoal | 300.0 | sacks | Gensan | | Bitung | Indonesia, China | Exported 242MT/mo to China via Manila. Wants to explore the Indonesian market. |
| Activated carbon | 15.0 | Jumbo Bags / Small Sacks | Davao | | Bitung | Indonesia, Malaysia | Exported 100MT/mo to Taiwan via Singapore. Wants to explore the Indonesian market. |
| Activated carbon | *Not specified* | 20-ft container | Davao | | Bitung | Indonesia | Handled exports of 400MT/mo to China via Shanghai. Interested to look for clients who can use the new route. |
| Activated carbon | 60.0 | 20-ft container | Davao | | Bitung | Indonesia and neighboring countries | Exported 400MT/mo to Europe via Singapore. Wants to explore Indonesian and ASEAN markets. |
| Charcoal | 60.0 | Jumbo bags, small sacks | Davao | | Bitung | Indonesia and neighboring countries | Exported 100MT/mo of charcoal briquettes to Europe via Singapore |
| Charcoal | 15.0 | Jumbo bags, small sacks | Davao | | Bitung | Indonesia, Malaysia | |

| 2015 projected export | | | | | | | 2011 trade |
|---|---|---|---|---|---|---|---|
| Commodity | Avg. monthly tonnage (ton) | Type of packing | Port of origin | Transshipment port | Port of destination | Consumption region | |
| Cannery equipment (conveyors, tables, bins, etc.) | 50.0 | Bulk | Gensan | | Bitung | Indonesia | Exported 25MT/mo to PNG. Can explore transport to PNG via Bitung if competitive costs. Also interested to export to Indonesia. |
| Other industrial machinery and parts (fish aggregating device parts) | *Not specified* | Bulk | Gensan | Bitung | Papua New Guinea, Bitung | Papua New Guinea, Bitung | Exported 130MT/mo to PNG and Bitung. |
| Oil milling machine parts | *Not specified* | Bulk | Gensan | | Bitung | Amurang, North Sulawesi | Exported 0.5MT/mo to its sister company in Amurang (North Sulawesi). Willing to use Gensan-Bitung route if competitive costs. |
| Vessel equipment | 2.0 | Loose | Gensan | | Bitung | Indonesia | Exported 70MT/mo of fish, seafoods and fishmeal to Japan via Manila. |
| Packaging materials (labels, hang tags, stickers, corrugated cartons) | 200.0 | palletized, wrapped | Gensan | | Bitung | Indonesia, East Timor | Exported 100MT/mo to Madang PNG via Davao/ Manila/ Singapore. Can explore transport via Bitung route of competitive costs. Wants to export to Indonesia. |
| Polyethylene foam packaging, polyethylene insulators | *Not specified* | Rolls | Davao | | Bitung | North Sulawesi, Indonesia | Imported 1,122MT/mo of duofos fertilizer from Indonesia via Singapore. |
| Cords, fish nets | 30.8 | sacks, rolls | Gensan | | Bitung | Indonesia | Handled exports of 16.7MT/mo of cords to China via Manila. Wants to explore the Indonesian market |
| TOTAL | 936.1 | | | | | | |

Note: Total exports do not include tonnage of commodities (in parenthesis, totaling 937.5MT/mo) that are currently being exported to countries other than Indonesia but may be explored for the Indonesian market.

**Source:** Davao and General Santos Stakeholder Interviews, Survey Team, 2012

The General Santos/ Davao stakeholders are also looking at Indonesia as a potential source of supply of coal, frozen fish, copra, fertilizer, tin plates/lids/ends, paper products (for packaging materials), lumber and furniture, and equipment and spare parts. Estimated volume of these import cargoes for 2015 is at least 32,670 MT/month (see Table 3.13).

The volume of potential cargoes, both for export and import, can still increase if some of the stakeholders can use the General Santos-Bitung route as an alternative route to their markets and sources of supply. This possibility, however, greatly depends on whether or not using such alternative route will give them a competitive advantage in terms of lower logistical costs, better (or at least the same) market prices, and lower raw material acquisition costs. Nevertheless, they expressed interest in exploring such a route option.

Some stakeholders are interested to explore trading and business opportunities with Indonesia and nearby countries that may arise from the opening of the General Santos-Bitung route. At this time, however, most of them are not yet sure what specific products or businesses these could be.

While there is interest in using the shipping route, there is a need to validate the suitability of the specific cargoes for RO-RO type of shipping.

**Table 3.13** – Projected Import of General Santos/ Davao Stakeholders as Potential Cargo for the General Santos – Bitung Route, 2015

| 2015 projected import | | | | | | 2011 trade |
|---|---|---|---|---|---|---|
| Commodity | Avg. monthly tonnage (ton) | Type of packing | Port of origin | Transshipment port | Port of destination | |
| Frozen tuna products (belly, collar bone, tail, steaks) | 20.0 | individually quick frozen, boxes | Bitung | | Gensan | Imported 12MT/mo from Indonesia via Jakarta. Willing to import more depending on supply availability. |
| Frozen tuna | 3.0 | frozen packed | Indonesia | | Gensan | Imported 1MT/mo from Indonesia. |
| Frozen tuna | 83.0 | Frozen packed | Bitung | | Gensan | |
| Frozen tuna | 4,500.0 | Frozen in cartons | Bitung | | Gensan | Imported various ingredients and packaging materials from USA, China, Korea and Thailand for their fish cannery operations. |
| Fish products | *Not specified* | Frozen packed | Bitung | | Gensan | |
| Tuna products | *Not specified* | Frozen packed | Bitung | | Gensan | Imported 10MT/mo from Korea via Manila. |
| Agricultural products (onions, garlic, sugar ) | 1.0 | break bulk, jute sacks | Bitung, other ASEAN countries | | Gensan | Imported 1MT/mo from China via Manila. Wants to explore supply from Indonesia and other ASEAN countries. |
| Black pepper | 1.6 | jute sacks | Indonesia, BIMP-EAGA | | Gensan | Imported 0.8MT/mo from Hanoi and KL via Manila. Wants to explore supply from BIMP-EAGA via Gensan-Bitung route. |
| Ingredients (vegetables) | 1.0 | bags | Indonesia | | Gensan | Imported 10MT/mo from Canada and USA. Wants to source out from Indonesia |
| Coal | 33.5 | Sacks, bags | Indonesia | | Gensan | |
| Coal | 24,000.0 | loose | Indonesia | | Davao | Imported 24,000MT/mo from Indonesia. |
| Copra | 2,000.0 | bulk | Tahuna, Indonesia | | Gensan (private port) | Imported 2,000MT/mo from Tahuna. Cannot project import requirements. But if their production targets increase, surely their copra requirements will increase also. |
| Copra | (2,000.0) | bulk | Papua New Guinea | | Gensan | Imported 2,000MT/mo from PNG. Can explore transport via Bitung? |
| Duofos fertilizer | 1,570.0 | Bags | Indonesia | Singapore | Davao | Imported 1,122MT/mo from Indonesia via Singapore. |

| 2015 projected import | | | | | | 2011 trade |
|---|---|---|---|---|---|---|
| Commodity | Avg. monthly tonnage (ton) | Type of packing | Port of origin | Transshipment port | Port of destination | |
| Fertilizer and other related materials | (300.0) | bags, sacks | Indonesia, Asia | | Gensan | Imported 300MT/mo from Xiamen, China via Singapore. Wants to explore supply from Indonesia and other Asian countries. |
| Paper, kraft liner board | (4,262.0) | palletized | Savannah Georgia USA | Singapore | Gensan | Imported 3,552MT/mo from Savannah Georgia, USA via Singapore. Possible source from Indonesia? |
| Paper rolls, plastic resins | (11,722.0) | rolls, bags | Korea, Savannah (USA), Kotka Finland | Singapore | Gensan | Imported 10,656MT/mo from Korea, USA and Kotka, Finland. Possible source from Indonesia? |
| Thermal paper | (15.0) | Boxes | China | | Davao | Imported 15MT/mo from China. Company knew that thermal paper is cheaper in Indonesia but, without direct transport routes before, they have already invested in their office in China which they would probably use for some more years before considering other potential sources of supply. |
| Tin plate sheets, tin free steel strips and ends/lids | 130.0 | skid (metal strap bundled) | Jakarta | Singapore, Papua New Guinea | Gensan | Imported 93MT/mo from Jakarta via Singapore and PNG. |
| Coated plates | 161.0 | skid (metal strap bundled) | Jakarta, Thailand | Singapore | Gensan | Imported 80.5MT/mo from Jakarta and Thailand via Singapore. |
| Tins | (10.0) | boxes | Malaysia, Thailand | Singapore | Gensan | Imported 10MT/mo from Malaysia and Thailand via Singapore. Possible to source from Indonesia? |
| Ends/lids | 92.0 | carton boxes | Jakarta, Thailand | Singapore | Gensan | Imported 57.5MT/mo from Jakarta and Thailand via Singapore. |
| Equipment | (20.0) | Bulk | Asia | | Davao | Imported 20MT/mo from Asian countries. Can be sourced from Indonesia? |
| Furnitures and home decors | 20.0 | bulk | Jakarta | Manila | Gensan | Imported 10MT/mo from Jakarta via Manila. |
| Lumber | 55.0 | Bulk | Indonesia | | Davao | |
| TOTAL | 32,671.1 | | | | | |

Note: Total imports do not include tonnage of commodities (in parenthesis, totaling 18,329MT/mo) that are currently being imported from countries other than Indonesia, but may be explored for sourcing from Indonesia.

**Source:** Davao and General Santos Stakeholder Interviews, Survey Team, 2012

### 3.1.3 Travel/Tourism Stakeholders

The Survey Team interviewed 5 travel and tour operators in General Santos and 4 operators in Davao.

Travel and tour operators are usually small companies, with capitalization below USD50,000, average personnel complement of 3 to 5, and average gross sales of USD20,000 (except for the biggest grossing operator who reported sales of USD500,000). The tour operators in Davao are relatively bigger and reported higher sales than those in General Santos.

They handle mostly domestic tourists, which account for around 95% of total clientele compared to only 5% international/ foreign. Most are outbound tourists from General Santos, Davao, Manila and Zamboanga going to popular foreign regional destinations such as Singapore, Hong Kong, Macau, Middle East, Bangkok, Korea, Jakarta, Japan, Australia, USA and Canada, among others. The usual domestic transit points for outbound destinations are Cebu, Davao, Manila and Clark. Most of their inbound tourists originate from Manila, Korea, Hong Kong, Singapore and Bangkok.

The operators handled a total of 16,033 outbound domestic and 1,035 international tourists in 2009, going down to 10,656 domestic and 585 international in 2010, and recovering to 15,767 domestic and 849 international in 2011 (see Table 3.14). All of them suffered marked declines in tourists starting in 2010, mainly due to the growing popularity of online booking among travelers. Inbound tourists, both domestic and international, are generally much less than outbound for most tour operators, averaging only about 1,590 domestic and 250 international tourists per year.

**Table 3.14** – Sales Performance of Travel and Tour Stakeholders, 2009-2011 (Davao and General Santos)

| | 2009 (Pax) | 2010 (Pax) | 2011 (Pax) | Major destination/ originating country of international tourists |
|---|---|---|---|---|
| Outbound Domestic | 16,033 | 10,656 | 15,767 | |
| Outbound International | 1,035 | 585 | 849 | Hong Kong, Singapore, Thailand, Malaysia, USA, Japan, Korea, China, Dubai, Qatar, Middle East, Indonesia, UK, Canada, New Zealand, Australia |
| *Total Outbound* | *17,068* | *11,241* | *16,616* | |
| Inbound Domestic | 1,527 | 1,346 | 1,889 | |
| Inbound International | 355 | 70 | 330 | Hong Kong, USA, Dubai, Qatar, Singapore, Thailand, Malaysia, Japan, Korea, China, Indonesia, Canada, New Zealand, Australia |
| *Total Inbound* | *1,882* | *1,416* | *2,219* | |
| TOTAL Outbound & Inbound | 18,950 | 12,657 | 18,835 | |

Note: This includes data from only 7 tour operators; 2 respondents did not provide their passenger records.

**Source:** Davao and General Santos Stakeholder Interviews, Survey Team, 2012

The most popular outbound tour packages are the General Santos/ Davao-Manila-Hong Kong and General Santos/ Davao-Cebu-Hong Kong tours, which cost from PhP20,000-32,000 per person (average of PhP27,000) for 3D/2N duration. The transport mode is by plane, with an average of 3.6 hours transit time in between connections. This particular tour averaged 8 passengers a month in 2011, projected to increase to 18 a month by 2015. A few companies projected a decrease in tour clientele, citing the continuing trend of online booking. The second most popular tours are the 4D/3N

General Santos/ Davao-Manila-Singapore package and the 4D/3N Davao-Clark-Bangkok package, costing an average of PhP30,000 per person. They are also by plane, with a 4 hour average transit time. These tours averaged 5 passengers a month in 2011, which is projected to increase to 8 per month by 2015. Other tours common among the operators are the 4N/5D General Santos/ Davao-Manila/Cebu-Korea tour (PhP56,000), 4D/3N Davao-Singapore tour (PhP38,000), and the 4D/3N General Santos/ Davao-Manila-KL tour (PhP25,000) which got an average patronage of 3 passengers per month in 2011 and projected to increase to 8 by 2015. Some of the long-haul (average 7D/6N) tour destinations are London, USA and Beijing, transiting from Manila.

According to some tour operators, Indonesians who come to Davao and General Santos are usually from Manado and Jakarta. They come mainly for shopping and business. They buy in bulk to resell to Indonesia. Filipinos who avail of outbound tours to Indonesia are usually leisure travelers.

The package tour business in the Philippines has distinct peak months, namely October-November, December-January, and March-June. The rest of the months are lean months.

The tour operators are generally bullish about the travel and tour industry in the next few years. They projected an average 70% increase in their current numbers of tourists handled by 2015. Applying this to the data in Table 3.14, the total number of tourists that the 7 tour operators are projected to handle in 2015 will be about 32,020.

The operators see the advantages of RO-RO services as encouraging more trade, tourism, investments and income in the Philippines, especially the SOCCSKSARGEN and Davao regions; provide a more affordable travel option to/from the regions and stimulate greater travel; and increase tourism sales. However, there are some apprehensions about potential port traffic congestion, crime, terrorism, smuggling, human trafficking, and seasickness during travel.

They expect the RO-RO services to be affordable, safe, have frequent and convenient schedules (at least twice a week), enough capacity for passengers (at least 200) and cargo, good accommodations, and managed efficiently by a reputable operator with good business savvy. A few said the service should have an ambiance of a leisure boat because tourists travel for leisure and fun. They generally welcome the opening of the RO-RO service and hope that it would be promoted effectively.

All of the General Santos operators unanimously said they are willing to use the RO-RO services for the above-cited advantages. In addition, they see the RO-RO route as an opportunity to offer new tour packages, and a potentially much cheaper alternative to the expensive and longer air travel via Manila, and Jakarta or Singapore. Some of the Davao operators, however, are not too keen on the route. They said that the RO-RO service is not for the leisure traveler and maybe better for cargo.

They fear that the land travel (3 hours) between Davao and General Santos to take the boat to/from Bitung may be inconvenient and tiring for some travelers.

Passengers who may potentially use the service are traders, Indonesians studying in the Philippines and their relatives, and travelers who are adventurous and not in a hurry. The RO-RO operation can also boost the education sector, as Indonesians can study English and other skilled courses in the regions.

Some of the operators said they are willing to bring vehicles across the route if only the issues on right hand/left hand drive vehicles, driver's license and other legal issues, and drivers' familiarity with the places would not be a problem. They think that a fare of PhP2,500-7,000 (average PhP5,300 or USD125) per passenger would be acceptable fare rates on the RO-RO. Terminal fees should be less than the airport terminal fee of PhP200.

The RO-RO operation can help the local economy and expand development outreach. The more people and cargo passing across two points, the more it will bring additional jobs (initially at the ports and eventually to the surrounding areas), increased revenues for the local economies, etc. On the negative side, there is apprehension that the new route might foster backdoor smuggling, human trafficking, and movement of illegal aliens.

The RO-RO project can also enhance bilateral relations between the Philippines and Indonesia. The Philippines-Indonesia relationship has been strengthened by the BIMP-EAGA cooperation. The introduction, and more importantly the sustainability, of the new RO-RO service will deepen the ties between the two countries.

### 3.1.4 Views and Opinions on the General Santos-Bitung RO-RO Route

Generally, the cargo stakeholders in Davao and General Santos have not been using RO-RO shipping service, and thus have limited and/or no information on this RO-RO undertaking. Nevertheless they welcome the project and are open to the RO-RO project. Many may have no definite plans on how to proceed because their market destinations are USA, Europe, Middle East, Southeast Asia (excluding Indonesia), etc. Others are more keen on the route as they either have existing business relations with Indonesia or have already identified their trading and business opportunities with Indonesia. The following section summarizes the major views and opinions of the Davao/ General Santos survey stakeholders regarding the General Santos-Bitung route.

1) *The new route can potentially increase trade and business opportunities for Mindanao.*

   According to the Philippine Coconut Authority, Davao Region region has 376,000 hectares of farms planted to coconut, with half of the total area located in Davao Oriental. From these farms, the region produces about three million nuts annually. A number of coconut-based companies in the Davao Region and more companies are likely to position here. According to DTI, several companies are already planning to expand and/or establish new coconut-based operations in the region. These include the expansion of operations of existing companies producing desiccated coconut, activated carbon, coco charcoal, and other new coconut-based products; a new Filipino-Korean joint venture in Mati City, Davao Oriental on a coconut peat plant; and a few other companies who plan to go into coco fiber and other downstream processing of coconuts. These projects may trigger a possible shortage of raw materials in the future. The General Santos-Bitung route can be used to source out raw materials from Indonesia. The crude coconut oil manufacturer in General Santos, which currently imports its copra from Tahuna, Indonesia is interested to use the planned RO-RO route if the costs will be competitive.

The General Santos-based fishing operators and fish processors, especially those with operations and business relationships in Bitung/ Manado are keenly interested to explore the more direct route for their current and potential exports/ imports to/from Indonesia.

One of the surveyed companies in Davao is interested to export its polyethylene packaging and polyethylene roofing insulation products to Indonesia via the General Santos-Bitung route. The same company is also sourcing substantial volumes of duofos fertilizer from Indonesia (no information as to where in Indonesia) via Singapore.

A furniture dealer in General Santos is currently importing Indonesian furniture and home decors via Jakarta. They want to explore the Bitung-General Santos route as a possibly cheaper alternative route.

Other stakeholders, especially those based in the SOCCSKSARGEN region, also see potential trading and business opportunities that can come with the opening of the direct shipping route with Indonesia. The forwarders can expand their clientele base when the route becomes available.

2) *The new route can possibly reduce overall logistics costs.*

Because the planned shipping route is more direct, shorter, provides faster transit and vessel turnaround, and may entail less handling fees, the stakeholders who are interested to potentially use the new route think that this would contribute to lowering their overall logistics costs. They point out that it is important that prior to implementation, the shipping costs will go through careful deliberation among the authorized participating groups in the Philippines and Indonesia.

3) *The new route can potentially benefit the local economies of the Philippines and Indonesia.*

   The increase in trade, business, investments and tourism in both countries that may be brought about by the opening of the direct shipping route can benefit the local economies and people of the two countries.

To realize the abovementioned anticipated benefits of the new RO-RO service, the stakeholders raised the following concerns and conditions that should be considered in developing the new route and service:

1) *The shipping cost per nautical mile should be competitive vis-a-vis the current costs incurred by the shippers using alternative routes.*

   The bottom-line consideration of the shippers is cost. If they could bring/get their cargo requirements to/from their destinations at a lower cost through the new route, then the new shipping service would be attractive for them to use.

2) *The vessel schedule should maintain a regular and stable schedule (at least twice a week and more frequent in the long-run).*

   To sustain business between the two countries, the new shipping service should maintain a regular schedule of maybe twice a week at the start. The frequency could increase later. The schedule should also be reliable. The time of departure and arrival should not change frequently, unless due to uncontrollable factors such as bad weather, etc. Transshipment delays should be avoided, if not eliminated. There should be minimal interruptions on the way to destinations (e.g., unnecessary checkpoints/coast guards).

3) *The type and size of the vessel should meet the requirements of the shippers.*

   The vessel should have adequate cargo capacity (at least 100 TEUs), safe and seaworthy (appropriate to the wind and wave attributes of the route). It should have lifting gears/ cranes of at least 35 tons lifting capacity, capable of accommodating/ servicing reefer containers, and with refrigeration sockets/terminals on board. The shipping service should be operated by a reliable and reputable group. It should have proper insurance and adequate number of qualified personnel to provide quality service.

4) *The RO-RO port facilities should be adequate.*

   The priority bay/berthing for the RO-RO service is necessary to facilitate faster loading and unloading of passengers, vehicles and cargoes. This could also ensure the timely departure and arrival of the RO-RO vessel. The current cargo handling facilities in the General Santos Port may be inadequate and may need to be expanded. The existing monopoly of the lone port handler should be addressed to improve port services.

5) *The shipping service should be well supported by all the concerned sectors.*

Both the government, private and non-government sectors in the Philippines and Indonesia should support and promote the new shipping service to help it realize its benefits. Both governments should facilitate easy documentation clearance/permits for the shipping operator, provide incentives, eradicate informal fees, ensure transparency and consistency in policies and regulations. All sectors should help promote the use of the new service in order to build demand and sustain its operation over the long-run.

6) *Cargo in containers on chassis is expensive.*

Transporting goods in containers on chassis is costly because the chassis has to be delivered back to origin. Some shippers have problems with availability of containers; with the RO-RO service, there may also be a problem with availability of container chassis.

7) *Regulate the entry of similar agricultural products.*

Unless regulated, the opening of this route may possibly be detrimental to the plight of local farmer producers in the region. Although there may be uncontrolled market forces for the trading between the Philippines and Indonesia, it is still hoped that the local players (especially farmers) will be sustained and benefited.

## 3.2 Bitung and Manado

### 3.2.1 General Profile of Stakeholders

From the total of 45 respondents, the respondent sample is dominated by freight forwarding companies (17 companies), while the rest are manufacturers, traders and travel agents (see Table 3.15). In term of location distribution, many forwarding companies and manufacturers are located in Bitung City as the center of industry in North Sulawesi, while traders and travel agents are more concentrated in Manado City as a center of business and services. It is understandable whether forwarding companies and manufacturers tend to open their business near industrial estates and port, where potential demand, adequate infrastructure, and good accessibility are the main factors. In the other side, traders and travel agents prefer to locate their business around the city center, where people concentration and movement are high and tertiary economic activities more alive.

**Table 3.15** – Distribution of Survey Sample by Type of Stakeholder (Bitung and Manado)

| City | Shipper / manufacturer / processor | Trader / distributor / retailer | Freight forwarder | Travel & tour operator | TOTAL |
|---|---|---|---|---|---|
| Bitung and Manado | 10 | 3 | 17 | 15 | 45 |
| % | 22.2 | 6.7 | 37.8 | 33.3 | 100.0 |

**Source:** Bitung and Manado Stakeholder Interviews, Survey Team, 2012

### 3.2.2 Cargo Stakeholders

According to the North Sulawesi Trade Agency publication, the economic sector in Bitung City is composed of relatively varied business entities. However, the dominant business sectors are fishery, natural resources (wood, coal, and copra), food and beverage, and as well as furniture industries. Therefore, the survey was directed to cover such business sectors. As Table 3.16 shows, fishery producers were the most interviewed respondents (13.3%) after the forwarders (53.3%).

**Table 3.16** – Cargo Stakeholders by Type of Business (Bitung and Manado)

| Item | | Forwarder | Trucking | Agri. producer | Fishery producer | Agri./ fishery processor | Manufacturer (non-agri./ fishery) | Distributor / trader / wholesale dealer | Others | TOTAL |
|---|---|---|---|---|---|---|---|---|---|---|
| Main business | No | 16 | 1 | 2 | 4 | 3 | 1 | 3 | 0 | 30 |
| | % | 53.3 | 3.3 | 6.7 | 13.3 | 10.0 | 3.3 | 10.0 | 0.0 | 100.0 |
| Business activities | No | 16 | 2 | 2 | 4 | 4 | 2 | 9 | 0 | 39 |
| | % | 41.0 | 5.1 | 5.1 | 10.3 | 10.3 | 5.1 | 23.1 | 0.0 | 100.0 |

**Source:** Bitung and Manado Stakeholder Interviews, Survey Team, 2012

In terms of company size by number of employees, more than half of the cargo stakeholder respondents are classified as small companies (see Table 3.17). Only three companies are considered large. If classified according to value of capitalization, all of the respondents are categorized as small and medium companies. The classifications are based on standard definitions by the Indonesian Statistics Bureau and Ministry of Cooperative and Small Medium Enterprise. Based on capitalization, the 12 forwarder respondents are a mix of small and medium companies. Unfortunately, almost half of respondents could not be classified, since they did not give their relevant information.

There is a distinctive pattern in the forwarding business in Bitung. Most of them are small, involving only less than 10 employees with a capital of not more than IDR100,000,000. Generally, all matters related to the technical deliveries in the field are done by the involvement of third parties such as truck rental company and driver, document processing services, and others.

**Table 3.17** – Cargo Stakeholders by Company Size (Bitung and Manado)

| Company size (shippers) | No. of comp. by employment size | No. of comp. by capitalization | Forwarder | Trucking | Agri. producer | Fishery producer | Agri./ fishery processor | Manufacturer (non-agri./fishery) | Distributor / trader / wholesale dealer |
|---|---|---|---|---|---|---|---|---|---|
| Micro | 3 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| % | 10.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Small | 16 | 10 | 7 | 0 | 1 | 0 | 0 | 0 | 2 |
| % | 53.3 | 33.3 | 23.3 | 0.0 | 3.3 | 0.0 | 0.0 | 0.0 | 6.7 |
| Medium | 8 | 8 | 5 | 0 | 0 | 2 | 0 | 0 | 1 |
| % | 26.7 | 26.7 | 16.7 | 0.0 | 0.0 | 6.7 | 0.0 | 0.0 | 3.3 |
| Large | 3 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| % | 10.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| No answer | 0 | 12 | 4 | 1 | 1 | 2 | 3 | 1 | 0 |
| % | 0.0 | 40.0 | 13.3 | 3.3 | 3.3 | 6.7 | 10.0 | 3.3 | 0.0 |
| TOTAL | 30 | 30 | 16 | 1 | 2 | 4 | 3 | 1 | 3 |
| % | 100.0 | 100.0 | 53.3 | 3.3 | 6.6 | 13.4 | 10.0 | 3.3 | 10.0 |

**Source:** Bitung and Manado Stakeholder Interviews, Survey Team, 2012

Note:

1) Company classification by employment size based on Statistics Indonesia Bureau:
   - Micro : 1 – 4 employees
   - Small : 5 – 19 employees
   - Medium : 20 – 99 employees
   - Large : more than 100 persons
2) Company classification by capitalization based on Ministry of Cooperative and Small Medium Enterprise:
   - Micro : < IDR10,000,000
   - Small : IDR10,000,001 – IDR200,000,000
   - Medium : IDR200,000,001 – IDR10,000,000,000
   - Large : > IDR10,000,000,000

Only less than 50% of respondents gave their export/ import volumes and values during the survey. Hence, according to the 18 respondents, the agriculture and fishery producers are recorded as the most active exporters, whereas the forwarders are the most active importers (see Table 3.18). Based on their responses, export activities are portrayed to be larger than imports, in both volume and value.

**Table 3.18** – Export Volume and Value of Cargo Stakeholders by Nature of Business, 2011 (Bitung and Manado)

| Main business | Export | | | | Import | | | |
|---|---|---|---|---|---|---|---|---|
| | Volume | | Value | | Volume | | Value | |
| | ton | % | USD | % | ton | % | USD | % |
| Forwarding | 210,200 | 10.2 | 64,000 | 1.5 | 23,800 | 96.0 | 68,570 | 100.0 |
| Trucking | - | - | - | - | - | - | - | - |
| Agricultural producer | 50 | 0.0 | 40,000 | 1.0 | - | - | - | - |
| Fishery producer | 36,085 | 1.8 | 685,714 | 15.5 | - | - | - | - |
| Agri./ fishery producer | 1,804,005 | 87.8 | 1,928,571 | 43.6 | - | - | - | - |
| Manufacturer (non-agri./fishery) | 3,600 | 0.2 | 1,710,000 | 38.6 | - | - | - | - |
| Distributor/ trader/ wholesale dealer | - | - | - | - | 1,000 | 4.0 | - | - |
| TOTAL | 2,053,940 | 100.0 | 4,428,285 | 100.0 | 24,800 | 100.0 | 68,570 | 100.0 |

**Source:** Bitung and Manado Stakeholder Interviews, Survey Team, 2012

Survey results show that China and the Netherlands are the top two export destinations from Bitung. Fishery products, charcoal, woods, oilcake and active carbon are the most exported commodities to those countries. Among the Southeast Asian countries, the respondents mostly exported their commodities to Vietnam, Singapore, and Thailand. In some cases, Singapore is also used as a transshipment point for their exports onwards to their European and East Asian destinations.

The largest commodities exported from Bitung by the respondents are coconut flour and fishery products. In case of fishery products, these are flying fish (*cakalang)*, tuna, and wood fish (*tongkol*). The following table presents a detailed breakdown of the major commodities handled by the respondents.

**Table 3.19** – Summary of Export Logistics of Cargo Stakeholders, 2011 (Bitung and Manado)

| Commodity | | Avg. monthly tonnage (ton) | Type of packing | Port | | |
|---|---|---|---|---|---|---|
| SITC | Specific products of stakeholders | | | Origin | Transshipment | Destination |
| 03 | Flying fish (*cakalang*), tuna,wood fish (*kayu/tongkol*) | 3,053 | Styro-foam box (frozen) | Bitung | Jakarta, Singapore | Thailand, South Korea, Japan, Netherlands |

| Commodity | | Avg. monthly tonnage (ton) | Type of packing | Port | | |
|---|---|---|---|---|---|---|
| SITC | Specific products of stakeholders | | | Origin | Transshipment | Destination |
| 07 | Clove, vanilla | 11 | Bags | Bitung | Surabaya, Jakarta, Singapore | Singapore, Netherlands, Belgium (and European countries) |
| 09 | Coconut flour | 150,000 | Bags | Bitung | Jakarta | Belgium, Netherlands |
| 22 | Oilcake | 267 | Loose | Bitung | Jakarta | China |
| 24 | Charcoal, coconut woods | 405 | Bags, container ized | Bitung | Makassar, Surabaya, Jakarta, Singapore | Vietnam, China |
| 43 | Copex (kernel oil) | 550 | *Not specified* | Bitung | | China |
| 59 | Activated carbon | 40 | Containe rized | Bitung | Makassar, Jakarta | China |
| TOTAL | | 154,326 | | | | |

**Source:** Bitung and Manado Stakeholder Interviews, Survey Team, 2012

Regarding import activities, the major items imported by the respondents are primary goods such as rice and industrial products such as electronics and vehicle spare parts. It is recorded that more than 15,000 tons of rice is imported per month, while electronics and vehicle spare parts averaged only 201 tons per month (see Table 3.20). China and two Southeast Asia countries (Thailand and Vietnam) are the dominant origins of these import commodities.

**Table 3.20** – Summary of Import Logistics of Cargo Stakeholders, 2011 (Bitung and Manado)

| Commodity | | Avg. monthly tonnage (ton) | Type of packing | Port | | |
|---|---|---|---|---|---|---|
| SITC | Specific products of stakeholders | | | Origin | Transshipment | Destination |
| | Rice | 19,500 | Bags | Thailand, Vietnam | Semarang | Bitung |
| 89 | Electronics, spare parts (car, motor), | 201 | Boxes, varies, inside container | European countries, China, Malaysia | Singapore, Jakarta, Surabaya | Bitung |
| TOTAL | | 19,701 | | | | |

**Source:** Bitung and Manado Stakeholder Interviews, Survey Team, 2012

Only 9 respondents (out of a total 35) shared their projections regarding export activities. In addition, only 3 respondents illustrated their import activities in the future. Tables 3.21 and 3.22 show the projected exports and imports in 2015. Many of the respondents look forward to exporting coconut flour, palm derivative oil, and charcoal to North East Asian and European countries such as China, Korea, the Netherlands, and Belgium. The only recorded import commodities are electronics and vehicle spare parts from China, Malaysia, Taiwan and European countries. Worth noting is that most of the stakeholders think that they can use the planned General Santos-Bitung RO-RO shipping service for transshipment only, not as final destination of their cargoes.

**Table 3.21** – Projected Exports of Bitung Stakeholders as Potential Cargo for the General Santos – Bitung Route, 2015 (Bitung and Manado)

| Commodity | Avg. monthly tonnage (ton) | Type of packing | Port of origin | Transshipment port | Port of destination | Consumption region |
|---|---|---|---|---|---|---|
| Frozen flying fish (*cakalang*), tuna, and other | 82 | Boxes, in container | Bitung | Philippines | Japan, China, Korea, Netherlands, Belgium | Japan, China, Korea, Netherlands, Belgium |
| Cloves | 20 | Bags | Bitung | Philippines | Singapore, Thailand | Singapore, Thailand |
| Charcoal | 440 | Bags, in container | Bitung | Philippines | Vietnam, China | Eastern Asia countries |
| Palm derivative oil | 1,000 | *Not specified* | Bitung | Philippines | China, USA | China, USA |
| Vanilla | 2 | Bags | Bitung | Philippines | | European countries |
| Coconut wood | 5 | *Not specified* | Bitung | Philippines | China | China |
| Coconut flour | 160,000 | Bags | Bitung | Philippines | Belgium, Netherlands | European countries |
| Activated carbon | 50 | Container | Bitung | Philippines | China | China |
| TOTAL | 161,599 | | | | | |

**Source:** Bitung and Manado Stakeholder Interviews, Survey Team, 2012

**Table 3.22** – Projected Imports of Bitung Stakeholders as Potential Cargo for the General Santos – Bitung Route, 2015 (Bitung and Manado)

| Commodity | Avg. monthly tonnage (ton) | Type of packing | Port of origin | Transshipment port | Port of destination | Consumption region |
|---|---|---|---|---|---|---|
| Electronics, spare parts | 270 | Boxes | Europe, China, Taiwan, Malaysia | Gensan | Bitung, Manado | North Sulawesi |
| TOTAL | 270 | | | | | |

**Source:** Bitung and Manado Stakeholder Interviews, Survey Team, 2012

### 3.2.3 Travel/Tourism Stakeholders

Manado is well known as one of the interesting tourism destinations in Indonesia. There are several places of tourist interest around this city, ranging from volcanoes, natural conservations, shopping centers, and cultural places. In addition, Manado is also often used as a venue for holding regional and international events. There are more than 10 star-classed hotels and 50 restaurants supporting the tourism activities in this city. Along with the increasing of tourism facilities development, the travel agent business is also growing rapidly. Therefore, Manado has good potential for tourism development.

The survey interviewed 15 tour and travel agent respondents. The most common business lines engaged in by the travel agents are ticketing, hotel reservation, and inbound tour packages. According to survey results, the number of outbound trips grew steadily per year during 2009-2011 (see Table 3.23). The number of inbound tourists also shows some growth during 2010-2011. According to the Tourism Agency of North Sulawesi Province, this rapid increase is contributed by many regional and international events held in Manado during 2011.

Domestic tourists to Manado are usually from Jakarta, Makassar and Denpasar, while the foreign tourists are from Southeast Asia (Singapore, Malaysia), Europe (UK, Netherlands), and many others. In case of outbound traffic, many tourists travel to China, Saudi Arabia, Singapore, Malaysia, and others.

**Table 3.23** – Sales Performance of Travel and Tour Stakeholders, 2009-2011 (Bitung and Manado)

| | 2009 (Pax) | 2010 (Pax) | 2011 (Pax) | Major destination/ originating country of international tourists |
|---|---|---|---|---|
| Outbound Domestic | 1,050 | 2,195 | 2,840 | - |
| Outbound International | 355 | 410 | 522 | UK, Netherlands, China, Singapore, Malaysia, Korea, Saudi Arabia |
| *Total Outbound* | *1,360* | *2,605* | *3,362* | - |
| Inbound Domestic | 995 | 1,510 | 11,440 | - |
| Inbound International | 185 | 158 | 277 | Malaysia, Singapore, Belgium, Korea, Singapore, Japan |
| *Total Inbound* | *1,180* | *1,668* | *11,717* | |
| TOTAL Outbound & Inbound | 2,540 | 4,273 | 15,079 | |

**Source:** Bitung and Manado Stakeholder Interviews, Survey Team, 2012

### 3.2.4 Views and Opinions on the General Santos-Bitung RO-RO Route

The tables below summarize the opinions of the respondents with regard to the opening of a RO-RO service with Bitung as a port of call.

**Table 3.24** – Cargo Stakeholders' Opinions on the Bitung-General Santos-Davao Route (Bitung and Manado)

| Potential and advantages of RO-RO Service | Issues and concerns on the RO-RO service |
|---|---|
| It provides cheaper service fares and more intensive schedule. | Many businesses are doing their shipping by their own vessels and port. |
| It can carry large trucks and passengers vehicles with short time of | It is considered as unstable vessel, therefore many stakeholders |

| Potential and advantages of RO-RO Service | Issues and concerns on the RO-RO service |
|---|---|
| loading and unloading process. | are worried that sharing space between cargoes, passengers and vehicles is too risky for security and safety, especially for such long distance trip. |
| Its operation can revive international trade between Indonesia and Philippines, and encourage government to make open-trade agreement. | It can increase import products coming to North Sulawesi. As an impact, it may compete with local products, which are commonly of less quality (trade imbalance). |
| It is possible to increase business opportunities for more people especially small and medium businesses. | High waves during rough sea conditions can be very dangerous for private vehicles and cargoes inside the vessel. |
| It can connect Bitung to other hinterland potential islands such as Tahuna, instead of its main route (General Santos and Davao). | Its operation may require detailed suitability of port design and facilities as well as good accessibility from the city center, therefore additional cost could be incurred by government to construct supporting infrastructures. |
| It can reduce the current high transportation cost caused by transit route to/from Surabaya/Jakarta before Singapore. In this case, shippers can directly distribute their cargoes to other countries via Davao/General Santos. | It may increase the potential of smuggling, terrorism, and other illegal activities if the operation is not supported by adequate regulation and control by the government (Bitung and Gensan). |
| It has large capacity to accommodate containers. | |

**Source:** Bitung and Manado Stakeholder Interviews, Survey Team, 2012

**Table 3.25** – Travel/Tourism Stakeholders' Opinions on the Bitung-General Santos-Davao RO-RO Route (Bitung and Manado)

| Potential and advantages of RO-RO service | Issues and concerns on the RO-RO service |
|---|---|
| It can be good alternative to airplane for travelling abroad, especially with cheaper fares. | It may not suitable for tourism activities since the travel time from Bitung to Gensan is very long, and may be uncomfortable due to the mixing of cabin with cargoes. |
| It can carry coach bus and passenger vehicles, can attract tourists to come by their own vehicles (less cost in this way). | Different vehicle and traffic regulations between countries may cause some problems without any adjustment policy. |
| It can increase the number of tourists coming to the Philippines, and vice versa, especially those who cannot afford airline fares. | |
| It can be new potential attraction, which is sailing to the Philippines with RO-RO, would be potential for adventurous tourists or backpackers. | High waves during rough sea conditions can be very dangerous for private vehicles and cargoes inside the vessel. |
| It can connect Bitung to other hinterland potential islands such as Tahuna, instead of its main route (General Santos and Davao). | Its operation may require detail suitability of port design and facilities as well as good accessibility from the city center, therefore additional cost could be incurred by government to construct supporting infrastructures. |
| It can reduce the current high transportation cost caused by transit route to/from Surabaya/Jakarta before Singapore. In this case, shippers can directly distribute their cargoes to other countries via Davao/General Santos. | It may increase the potential of smuggling, terrorism, and other illegal activities if the operation is not supported by adequate regulation and control by the government (Bitung and Gensan). |
| It has large capacity to accommodate containers. | |
| It has potential since many people in North Sulawesi have good relationships with people in Davao-Gensan, such as family relations, cultural relations, etc. | |

**Source:** Bitung and Manado Stakeholder Interview, Survey Team, 2012

## 3.3 Penang

### 3.3.1 General Profile of Stakeholders

A total of 40 stakeholders responded to the survey in Penang. The number is broken down into 16 travel and tour operators, 10 freight forwarders, 8 ship operators or ship agents, 3 shippers/ manufacturers/ processors, and 3 traders/ distributors/ retailers (see Table 3.26). Most of the respondents have their headquarters in Penang, except for the ship operators/ ship agents, which is quite understandable since Penang is not really a maritime center for shipping companies. On the other hand, considering that Penang is a tourist destination, more than 90% of the travel and tour operators are headquartered at Penang.

**Table 3.26** – Distribution of Survey Sample by Type of Stakeholder (Penang)

| City | Shipper / manufacturer/ processor | Trader / distributor / retailer | Freight forwarder | Travel & tour operator | Ship operator/ ship agent | TOTAL |
|---|---|---|---|---|---|---|
| Penang | 3 | 3 | 10 | 16 | 8 | 40 |
| % | 7.5 | 7.5 | 25.0 | 40.0 | 20.0 | 100.0 |

**Source:** Penang Stakeholder Interviews, Survey Team, 2012

The succeeding discussions will focus on stakeholders in the cargo business. The analysis on tour and travel operators will be presented in the latter part.

### 3.3.2 Cargo Stakeholders

Nearly half of the respondents are in the forwarding business (see Table 3.27). Ten identified this as their main line of business, and two others (a distributor/trader and a ship agent) identified it as also one of their business activities. Ship operators and ship agents were also given special focus in the survey since their insight, experience and expertise would be crucial for the successful implementation and sustainable operation of the RO-RO service.

**Table 3.27** – Cargo Stakeholders by Type of Business (Penang)

| Item | | Forwarder | Trucking | Manufacturer (non-agri./ fishery) | Distributor / trader / wholesale dealer | Ship operators & ship agent | TOTAL |
|---|---|---|---|---|---|---|---|
| Main business | No | 10 | 0 | 3 | 3 | 8 | 24 |
| | % | 41.7 | 0.0 | 12.5 | 12.5 | 33.3 | 100.0 |
| Business activities | No | 12 | 2 | 3 | 3 | 8 | 28 |
| | % | 42.9 | 7.1 | 10.7 | 10.7 | 28.6 | 100.0 |

**Source:** Penang Stakeholder Interviews, Survey Team, 2012

In terms of company size based on the number of employees, more than half of the respondents can be classified as small companies (with 10 to 99 employees), a third can be classified as micro (employing less than 10 employees). The respondents from the manufacturing side are big companies; two companies employ more than 200 persons in their operations and the other one is categorized as medium with 140 workers (see Table 3.28).

The companies were not classified according to their capitalization because only four gave information on their company's capitalization and gross sales, and some with just vague figures (like more than MYR1 million). However, it can be deduced that the companies with more workers have a bigger capitalization.

**Table 3.28** – Cargo Stakeholders by Company Size (Penang)

| Company size (shippers) | No. of comp. by employment size | Forwarder | Manufacturer (non-agri./fishery) | Distributor / trader / wholesale dealer | Shipping & shipping agent |
|---|---|---|---|---|---|
| Micro | 8 | 5 | 0 | 2 | 1 |
| % | 33.3 | 50.0 | 0.0 | 66.7 | 12.5 |
| Small | 13 | 5 | 0 | 1 | 7 |
| % | 54.2 | 50.0 | 0.0 | 33.3 | 87.5 |
| Medium | 1 | 0 | 1 | 0 | 0 |
| % | 4.2 | 0.0 | 33.3 | 0.0 | 0.0 |
| Large | 2 | 0 | 2 | 0 | 0 |
| % | 8.3 | 0.0 | 66.7 | 0.0 | 0.0 |
| TOTAL | 24 | 10 | 3 | 3 | 8 |
| % | 100.0 | | | | |

**Source:** Penang Stakeholder Interviews, Survey Team, 2012

The survey respondents from Penang handled more than five million tons (one TEU is estimated at 20 tons) of exports and more than four million tons of imports in 2011 (see Table 3.29). The ship operators and ship agents account for about 80% of the total volume of trade.

The values of the export and import trades are not shown as only two respondents gave data on the export value and only one respondent gave the value of their imports. Most respondents gave the reason that they have no information at their level.

**Table 3.29** – Export Volume and Value of Cargo Stakeholders by Nature of Business, 2011 (Penang)

| Main business | Export | | | | Import | | | |
|---|---|---|---|---|---|---|---|---|
| | Volume | | | | Volume | | | |
| | ton | TEU | Total | % | ton | TEU | Total | % |
| Forwarding | 134,200 | 13,200 | 398,200 | 7.7 | 7,500 | 20,910 | 425,700 | 10.1 |
| Manufacturer (non-agri./fishery) | 500,000 | 14,400 | 788,000 | 15.3 | 300,000 | 840 | 316,800 | 7.5 |
| Distributor/ trader/ wholesale dealer | 2,900 | 50 | 3,900 | 0.1 | 23,600 | 2,500 | 73,600 | 1.8 |
| Shipping | 15,000 | 197,899 | 3,972,980 | 77.0 | 36,000 | 167,400 | 3,384,000 | 80.6 |
| TOTAL | 652,100 | 225,549 | 5,163,080 | 100. | 367,100 | 191,650 | 4,200,100 | 100.0 |

Note: The survey respondents either gave their cargo tonnage in metric tons or TEUs. The TEUs are converted to tons, at 20 tons per TEU, to compute the total tonnage.

**Source:** Penang Stakeholder Interviews, Survey Team, 2012

The table below shows the major commodities handled by the respondents and their logistics characteristics. In terms of average monthly tonnage, the top three major exports are steel billets, general cargo and rubber products. The destination ports are varied, from Aceh Langsa in Indonesia to ports in Europe, East Asia, the Middle East, Australia, and America. The major transshipment ports are Port Klang, Singapore and Hong Kong. The goods are mostly exported in containers. The total exports of the respondents total to some 780,000 tons per month.

**Table 3.30** – Summary of Export Logistics of Cargo Stakeholders, 2011 (Penang)

| Commodity | | | Avg. monthly tonnage (ton) | Type of packing | Port | | |
|---|---|---|---|---|---|---|---|
| SITC | Commodity classification | Specific products of stakeholders | | | Origin | Transshipment | Destination |
| 04 | Cereal & preparations | Rice | 140 | Bags | Penang | | Aceh Langsa |
| 06 | Sugar, sugar preparations and honey | Sugar | 12,585 | Bags in containers | Penang | Port Klang | Kuching, KK, Aceh Langsa |
| 43 | Processed Animal and vegetable oils and fats | Fatty Acid | 600 | Containerized | Penang | Singapore, Port Klang | Spain, USA |
| 57 | Plastics in primary forms | PVC resin, Plastic resin | 12,250 | Containerized | Penang | Singapore, Port Klang | Singapore, Kuching, Jakarta |
| 58 | Plastics in non-primary forms | Plastic packaging | 5 | Loose cargo | Penang | | Aceh Langsa |
| 59 | Chemical materials and products, n.e.s. | Chemical products | 400 | Containerized | Penang | West port | Kobe/Busan |
| 62 | Rubber manufactures, n.e.s. | Rubber, tyres | 77,885 | Containerized | Penang | Singapore, Port Klang, Hong Kong | China, Korea, Japan, India |

| Commodity | | | Avg. monthly tonnage (ton) | Type of packing | Port | | |
|---|---|---|---|---|---|---|---|
| SITC | Commodity classification | Specific products of stakeholders | | | Origin | Transshipment | Destination |
| 63 | Cork and wood manufactures (excluding furniture) | Fiber board | 7,600 | Containerized | Penang | Singapore | Middle East, India |
| 66 | Non metallic mineral manufactures, n.e.s. | Solar panels | 5,200 | Containerized | Penang | Port Klang | USA |
| 67 | Iron and steel | Steel billets | 500,000 | | Penang | | Various ports |
| 74 | Other industrial machinery and parts | Agricultural and Industrial machinery | 100 | Containerized | Penang | West port | Sydney |
| 82 | Furniture and parts thereof | Furniture | 1,200 | | Penang | North Port | Japan Kobe/Korea Busan |
| 89 | Miscellaneous manufactured articles, n.e.s. | General cargo | 167,900 | Pallet, containerized | Penang, South Thailand | North Port | Europe, Middle East, USA, Kuching, Kota Kinabalu, Sandakan, Shanghai |
| TOTAL | | | 780,765 | | | | |

**Source:** Penang Stakeholder Interviews, Survey Team, 2012

As regards imports, the major items are miscellaneous items like glass panels, manufactured products, merchandise, empty containers, and goods for transshipment, monomers, and cars. Other items account for less than 10,000 tons per month (see Table 3.31). The total imports of the respondents account for less than half of the exports at about 320,000 tons per month. The trading partners for import are almost the same countries they trade with in export.

**Table 3.31** – Summary of Import Logistics of Cargo Stakeholders, 2011 (Penang)

| Commodity | | | Avg. monthly tonnage (ton) | Type of packing | Port | | |
|---|---|---|---|---|---|---|---|
| SITC | Commodity classification | Specific products of stakeholders | | | Origin | Transshipment | Destination |
| 03 | Fish, Crustaceans, mollusks and preparations | Frozen seafood | 8 | Boxes | Langsa Aceh | | Butterworth |
| 04 | Cereal & preparations | Wheat, maize | 2,400 | Container ized | Australia /Argentina | West port | Penang |
| 05 | Vegetables and Fruits | Coconut | 5 | Loose | | | Satun South Thailand |
| 24 | Cork and wood | Sawn timber | 900 | Bundled | Kuching /Kota Kinabalu | | Penang |

| Commodity | | | Avg. monthly tonnage (ton) | Type of packing | Port | | |
|---|---|---|---|---|---|---|---|
| SITC | Commodity classification | Specific products of stakeholders | | | Origin | Transshipment | Destination |
| 27 | Crude fertilizers other than division 56, and crude minerals | Sand | 4,000 | Bulk | Chennai | | Penang |
| 32 | Coal, coke and briquettes | Charcoal | 10 | Bundles | Langsa Aceh | | Butterworth |
| 55 | Essential oils for perfume materials and cleaning preparations | Raw wax | 100 | Pallet inside containers | Belawan | | Penang |
| 56 | Fertilizers other than group 272 | Urea, fertilizer | 8,095 | Loose cargo, containerized | Langsa Aceh, Europe/US/China | Singapore | Butterworth, Penang |
| 57 | Plastics in primary forms | Monomer, liquid monomer | 28,000 | Bulk tanker | Jakarta /Kaoshiung/Chiba, Middle East/Korea/Jakarta | Port Klang | Own port, Penang |
| 62 | Rubber manufactures, n.e.s. | Rubber and scrap rubber | 200 | Break bulk | Langsa Aceh | | Butterworth |
| 63 | Cork and wood manufactures (excluding furniture) | Plywood, Paper box | 2,600 | Palletized break bulk, containerized | Kuching, Keelung, Shanghai | | Penang |
| 69 | Manufactures of metal, n.e.s. | Steel products | 80 | Containerized | Westport | Penang | Northern region |
| 74 | Other industrial machinery and parts | Agricultural and Industrial machinery | 2,800 | Containerized | Guangzhou | West port | NBCT |
| 78 | Road vehicles | Cars (CBU and CKD) | 16,000 | Containerized | Japan, Germany, Thailand, Korea | Westport/North Port of Port Klang | Penang Port |
| 89 | Miscellaneous manufactured articles n.e.s | Glass Panels, manufactured products, merchandise, empty containers, transshipment | 261,200 | Containerized | Kantang South Thailand, Vietnam /China/US /Europe /North East Asia, Guangzhou | Port Klang, PTP, Singapore, North port | Chinese, Japanese, European, US ports, Penang, NBCT |
| TOTAL | | | 317,398 | | | | |

**Source:** Penang Stakeholder Interviews, Survey Team, 2012

The most common assets owned or rented by the cargo stakeholders are container chassis/trailers, trucks/prime movers, and warehouses. Understandably, a logistics company owns the most number of trucks/prime movers and container chassis/trailers. Six companies own at least one warehouse each. One plastics company owns nine warehouses to store their goods.

The ship agents do not own any vessel, but are just representatives of shipping companies. One respondent is a ship owner/operator and owns vessels.

Other than Penang Port (including the New Butterworth Container Terminal), the respondents also used Port Klang, Singapore, Kuching and Bukit Kayu Hitam. Penang Port (and/or NBCT) was chosen because the cargoes are either coming from Penang or going to Penang. The other ports were chosen because they provide transshipment services, and as in the case of Bukit Kayu Hitam, serves as the road gateway to South Thailand.

### 3.3.3 Travel/Tourism Stakeholders

The most common business activities engaged in by the 16 tourism stakeholder respondents in the survey are ticketing and hotel reservations, and inbound tour packages, at 10 companies each (see Table 3.32). Outbound tour packages and transport rental services are offered by 6 companies each, and 3 companies are engaged in hotel operations.

**Table 3.32** – Tourism Stakeholders by Type of Business (Penang)

| Item | | Ticketing and hotel reservations | Inbound tour packages | Outbound tour packages | Transport rental services | Hotel Operations | Total |
|---|---|---|---|---|---|---|---|
| Business Activities | No. | 10 | 10 | 6 | 6 | 3 | 35 |
| | % | 28.57 | 28.57 | 17.14 | 17.14 | 8.57 | 100.0 |

**Source:** Penang Stakeholder Interviews, Survey Team, 2012

There are no large tourism stakeholders among the Penang survey sample. The respondents are mostly small companies (12 companies or 75% of the total) with 10 or more employees but less than a hundred (see Table 3.33). There are 3 micro companies (less than 10 employees) and 1 medium-sized company with more than a hundred employees.

**Table 3.33** – Penang Tourism Stakeholders by Company Size (Based on Employment)

| Micro | | Small | | Medium | | Large | | Total |
|---|---|---|---|---|---|---|---|---|
| Number | % | Number | % | Number | % | Number | % | Number |
| 3 | 18.75 | 12 | 75.0 | 1 | 6.25 | 0 | 0.0 | 16 |

**Source:** Penang Stakeholder Interviews, Survey Team, 2012

Penang is posturing itself as a tourist destination reinforced by the fact that George Town is a declared World Cultural Heritage site and has a highly publicized and advertised medical tourism industry. Most of the tourists coming for the World Cultural Heritage site are from Europe, the USA, and other affluent and culturally-inclined countries. For medical tourism, the tourists/patients are mostly affluent Indonesian families seeking technologically advanced medical treatment. This is a fast growing market and is further spurred by intensive media campaign.

The number of tourists handled by the respondent companies has shown a steady increase over the last three years. It also encouraged others to get into the tourism business. The table below shows the healthy growth of the tourist clients of the respondent companies.

The present tourist profile shows that these tourists come to Penang via air transport. If ever the RO-RO service would serve the tourism industry, it has to find its own niche market.

**Table 3.34** – Sales Performance of Travel and Tourism Stakeholders, 2009-2011 (Penang)

| | Year | | | Major Markets |
|---|---|---|---|---|
| | 2009 | 2010 | 2011 | |
| Inbound Tourists | 9,260 | 9,900 | 11,950 | Singapore, Indonesia, Thailand, Australia, China, Hong Kong, Vietnam, Taiwan, Europe, Cambodia, Korea, Japan |
| No. of Respondents | 6 | 6 | 6 | |
| Average per Respondent | 1,543 | 1,650 | 1,992 | |
| Outbound Tourists | 47,015 | 72,215 | 89,454 | |
| No. of Respondents | 13 | 13 | 14 | |
| Average per Respondent | 3,617 | 5,555 | 6,390 | |

**Source:** Penang Stakeholder Interviews, Survey Team, 2012

Based on the survey, the respondents feel that the tourism market will grow by about 13% per year up to 2015 (up from 5,199 in 2011 to 8,375 in 2015).

### 3.3.4 Views and Opinions on the Belawan-Penang-Phuket RO-RO Route

The table below summarizes the opinions of the cargo respondents with regard to the opening of a RO-RO service with Penang as a port of call.

**Table 3.35** – Summary of Opinions and Comments of Cargo Stakeholders (Penang)

| Potential and advantages of RO-RO service | Issues and concerns on the RO-RO service |
|---|---|
| It will provide better opportunity to market their products or market new products. | Current volume of cargo is small, not attractive for ship operators. |
| They could break away from monopolistic businessmen. | Quotas are imposed on products. (Not on RO-RO service). |
| Willing to go into a Joint Venture Agreement to start the service. This is a service that must be put in operation. | Competition from Chinese imports makes trade unprofitable. |

| Potential and advantages of RO-RO service | Issues and concerns on the RO-RO service |
|---|---|
| This will upgrade the service, providing safer voyage compared to existing service. | Port of Phuket is far from rubber producing areas. |
| It will provide an alternative to road and rail transport. | RO-RO rates must be competitive. |
| Trade may increase with additional mode of transport. It will hasten the growth of the region. | There might be trade imbalance. |
| Low cost for development. No need for container cranes. | Service might need subsidy to get firm footing. |
| Car exports/imports can use the service. | Government regulations must be liberalized. |
| It will support the plan for a logistics hub at the Industrial Park. | |
| It will support the increased infrastructure activities. | |
| Goods can be moved without containers. | |

**Source:** Penang Stakeholder Interviews, Survey Team, 2012

The tourism stakeholders are upbeat on the prospect of having a RO-RO service serving Penang. However, they also pointed out that there are issues that must be resolved. The table below outlines their comments.

**Table 3.36** – Summary of Opinions and Comments of Tourism Stakeholders (Penang)

| Potential and advantages of RO-RO service | Issues and concerns on the RO-RO service |
|---|---|
| It will be an additional mode of transport to bring in tourists. | Discomfort in a cargo vessel vis-a-vis a cruise liner. |
| It will provide more jobs and better income. | Service must be regular. |
| More products can be traded. | Should have hassle-free disembarkation. |
| Tourists will enjoy sea cruise. | Public information, media campaign are needed. |
| | Increased road traffic in Penang. |

**Source:** Penang Stakeholder Interviews, Survey Team, 2012

Other issues discussed

- Mode competition/substitution. The suitability/ viability of RO-RO shipping against air and land transport as well as conventional shipping should be looked into.
- Frequency of RO-RO services is a concern. A high frequency of RO-RO service is critical, especially for passengers.
- Should look into the potentials of making Penang a hub port for the Indonesia-Malaysia-Thailand Growth Triangle (IMT-GT), with the RO-RO service serving as the feeder.
  The customs, immigration, quarantine and security (CIQS) services, policies, and regulations must also be aligned with the concept of seamless transport to encourage trade, and therewith help ensure sustainable RO-RO shipping operations.

## 3.4 Belawan and Medan

### 3.4.1 General Profile of Stakeholders

The total successful survey sample is 35 respondents, of which 10 are tour and travel agents and the rest are forwarders and shippers (see Table 3.37). Most of those who were interviewed are located in Medan as capital city of North Sumatra and a few of them are located in Belawan near the Belawan Port. All tour operators have their headquarters in Medan. About 70% of forwarders and shippers are headquartered at Medan and the rest only act as branch offices.

**Table 3.37** – Distribution of Survey Sample by Type of Stakeholder (Belawan and Medan)

| | Shipper / Manufacturer / Processor | Trader / Distributor / Retailer | Freight Forwarder | Travel & Tour Operator | TOTAL |
|---|---|---|---|---|---|
| Belawan and Medan | 6 | 4 | 15 | 10 | 35 |
| % | 17.1 | 11.3 | 42.9 | 28.6 | 100.0 |

**Source:** Belawan and Medan Stakeholder Interviews, Survey Team, 2012

### 3.4.2 Cargo Stakeholders

Nearly half of the respondents are in the forwarding business (see Table 3.38). Twelve identified forwarding as their main line business, while eight of them also do trucking as their second line business.

**Table 3.38** – Cargo Stakeholders by Type of Business (Belawan and Medan)

| Item | | Forwarder | Trucking | Agri. Producer | Fishery Producer | Agri./ Fishery Processor | Manufacturer (Non-Agri./ Fishery) | Distributor / Trader / Wholesale Dealer | Others | TOTAL |
|---|---|---|---|---|---|---|---|---|---|---|
| Main business | No | 12 | 2 | 3 | 1 | 0 | 2 | 5 | 0 | 25 |
| | % | 48.0 | 8.0 | 12.0 | 4.0 | 0.0 | 8.0 | 20.0 | 0.0 | 100.0 |
| Business activities | No | 14 | 8 | 3 | 4 | 0 | 2 | 5 | 0 | 33 |
| | % | 42.4 | 24.2 | 9.1 | 3.0 | 0.0 | 6.1 | 15.2 | 0.0 | 100.0 |

**Source:** Belawan and Medan Stakeholder Interviews, Survey Team, 2012

In terms of company size based on the number of employees, 10 companies can be classified as medium-sized companies (with 20 to 99 employees). Based on capitalization, 14 companies can be classified as medium-sized (IDR 200 – 10,000 million). These medium-sized companies are mostly forwarding companies (see Table 3.39). Nine respondents refused to give their capitalization amounts, citing company rules.

**Table 3.39** – Cargo Stakeholders by Company Size (Belawan and Medan)

| Company Size (Shippers) | No. of Comp. by Employment Size | No. of Comp. by Capitalization | Forwarder | Trucking | Agri. Producer | Fishery Producer | Agri./ Fishery Processor | Manufacturer (Non-Agri./Fishery) | Distributor / Trader / Wholesale Dealer |
|---|---|---|---|---|---|---|---|---|---|
| Micro | 2 | 0 | 2 | 0 | 0 | 0 | 0 | 0 | 0 |
| % | 8.00 | 0.00 | 8.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Small | 8 | 2 | 6 | 4 | 1 | 0 | 0 | 0 | 1 |
| % | 32.00 | 8.00 | 24.00 | 16.00 | 4.00 | 0.00 | 0.00 | 0.00 | 4.00 |
| Medium | 10 | 14 | 7 | 5 | 1 | 0 | 0 | 0 | 1 |
| % | 40.00 | 56.00 | 28.00 | 20.00 | 4.00 | 0.00 | 0.00 | 0.00 | 4.00 |
| Large | 4 | 0 | 0 | 0 | 0 | 1 | 0 | 3 | 0 |
| % | 16.00 | 0.00 | 0.00 | 0.00 | 0.00 | 4.00 | 0.00 | 12.00 | 0.00 |
| No answer | 1 | 9 | 0 | 0 | 1 | 0 | 0 | 0 | 0 |
| % | 4.00 | 36.00 | 0.00 | 0.00 | 4.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| TOTAL | 25 | 25 | 15 | 9 | 3 | 1 | 0 | 3 | 2 |
| % | 100 | 100 | 60.00 | 36.00 | 12.00 | 4.00 | 0.00 | 12.00 | 8.00 |

**Source:** Bitung and Manado Stakeholder Interviews, Survey Team, 2012

Note:

1) Company classification by employment size based on Statistics Indonesia Bureau:
   - Micro : 1 – 4 persons
   - Small : 5 – 19 persons
   - Medium : 20 – 99 persons
   - Large : more than 100 persons
2) Company classification by capitalization based on Ministry of Cooperative and Small Medium Enterprise:
   - Micro : < IDR10,000,000
   - Small : IDR10,000,001 – IDR200,000,000
   - Medium : IDR200,000,001 – IDR10,000,000,000
   - Large : > IDR10,000,000,000

Regarding exports and imports, not all respondents provided such data to the surveyors because some of them have no data or information at their level. About 71% of the total volume of export trade are come from distributors/ traders/ wholesale dealers and about 53% of import trade volume are from agricultural producers. Table 3.40 below shows the data with some explanatory notes.

**Table 3.40** – Export Volume and Value of Survey Stakeholders by Nature of Business, 2011 (Belawan and Medan)

| Main Business | Export | | | | Import | | | |
|---|---|---|---|---|---|---|---|---|
| | Volume | | Value | | Volume | | Value | |
| | ton | % | IDR | % | ton | % | IDR | % |
| Forwarding | 1,907,830 | 28.8 | 2,569,010,000 | 0.8 | 6,231,085 | 99.9 | 794,400,000 | 46.9 |
| Trucking | 0 | 0.0 | 0 | 0.0 | 0 | 0.00 | 0 | 0.0 |

| Main Business | Export | | | | Import | | | |
|---|---|---|---|---|---|---|---|---|
| | Volume | | Value | | Volume | | Value | |
| | ton | % | IDR | % | ton | % | IDR | % |
| Agricultural Producer | 500 | 0.01 | 250,000,000,000 | 75.4 | 0 | 0.00 | 900,000,000 | 53.1 |
| Fishery Producer | 1,440 | 0.02 | 0 | 0.0 | 0 | 0.00 | 0 | 0.0 |
| Agri./ Fishery Producer | 0 | 0.0 | 0 | 0.0 | 0 | 0.00 | 0 | 0.0 |
| Manufacturer (Non-Agri./Fishery) | 5,200 | 0.1 | 5,158,000,000 | 1.6 | 0 | 0.00 | 0 | 0.0 |
| Distributor/ Trader/ Wholesale Dealer | 4,702,709 | 71.1 | 73,972,024,911 | 22.3 | 200 | <1 | 0 | 0.0 |
| TOTAL | 6,617,679 | 100.0 | 331,699,034,911 | 100.0 | 6,231,285 | 100.0 | 1,694,400,000 | 100.0 |

**Source:** Belawan and Medan Stakeholder Interviews, Survey Team, 2012

Notes:

- Export volume only filled by 14 companies representing 6 forwarders, 2 agricultural producers, 1 fishery producer, 3 distributors/ traders, and 2 manufacturers; 1 company answered 670 TEUs.
- Export value only filled by 9 companies representing 4 forwarders, 1 agricultural producer, 2 distributors/ traders, and 2 manufacturers.
- Import volume only filled by 5 companies representing 4 forwarders, 1 distributor/trader; 1 company answered 450 TEUs and 1 company answered 300 empty drums.
- Import value only filled by 5 companies representing 4 forwarders, and 1 agricultural producer.

Table 3.41 shows the major commodities handled by the respondents and their logistics characteristics. Three major export commodities are areca nut, resin stone and cinnamon skin. All of these are containerized and most use Singapore and Port Klang with port destination to Korea, Singapore, Australia, USA, Hamburg, Shanghai, Japan, China and Malaysia.

**Table 3.41** – Summary of Exports Logistics of Cargo Stakeholders, 2011 (Belawan and Medan)

| Commodity | | | Avg. Monthly Tonnage (ton) | Type of Packing | Port | | |
|---|---|---|---|---|---|---|---|
| SITC | Commodity Classification | Specific Products of Stakeholders | | | Origin | Transshipment | Destination |
| 23 | Crude rubber (including synthetic and reclaimed) | Rubber | 3,750 | container | Belawan | - | Singapore, Korea |
| 07 | Coffee, tea, cocoa, spices and manufatures thereof | Coffee seed | 537 | container | Belawan | Singapore | Singapore, Australia, Korea, USA, Hamburg, Australia |
| 51 | Organic chemicals | Glycerin | 1,050 | container | Belawan | Port Klang | Shanghai |
| 89 | Miscellaneous manufactured articles, n.e.s | General cargo | 130 | container | Belawan | Singapore | Japan, China, Malaysia, India |
| 89 | Miscellaneous manufactured articles, n.e.s | Returnable package | 39 | container | Belawan | Port Klang | Pasir Gudang |
| 05 | Vegetables and fruits | Areca Nut/Betel Nut | 180 | container | Belawan | | Singapore |
| 05 | Vegetables and fruits | Areca Nut/Betel Nut | 238,596 | container | Belawan | Singapore | India |

| Commodity | | | Avg. Monthly Tonnage (ton) | Type of Packing | Port | | |
|---|---|---|---|---|---|---|---|
| SITC | Commodity Classification | Specific Products of Stakeholders | | | Origin | Transshipment | Destination |
| 05 | Vegetables and fruits | Areca Nut/Betel Nut | 1,200 | container | Belawan | Port Klang | Chennai |
| 34 | Gas, natural and manufactured | Active carbon | 280 | container | Belawan | | Singapore |
| 62 | Rubber manufactured | Tires and tubes | 60 | container | Belawan | | Hamburg |
| 05 | Vegetables and fruits | Areca Nut/Betel Nut | 513.5 | container | Belawan | Singapore | Bangladesh |
| 03 | Fish, crustaceans, molluscs and preparations thereof | Shrimp | | | Belawan | | Japan, Europe, Asia, USA |
| 53 | Dyeing, tanning and coloring materials | Resin | 95,313 | container | Belawan | | Australia |
| 43 | Processed animal and vegetable oils and fats | Gambir | 375 | container | Belawan | Port Klang | Calcutta |
| 07 | Coffee, tea, cocoa, spices and manufatures thereof | Cinnamon skin | 31,541 | container | Belawan | Singapore | China, Malaysia |
| 84 | Articles of apparel and clothing accessories | Gloves | 10 | container | Belawan | | India |
| 42 | Fixed vegetable oils and fats, crude, refined or fractionated | CPO | 900 | container | Belawan | Singapore | Nigeria |
| 07 | Coffee, tea, cocoa, spices and manufatures thereof | Nutmeg skin | 20,630 | container | Belawan | Singapore | Malaysia |
| TOTAL | | | 395,104.5 | | | | |

**Source:** Belawan and Medan Stakeholder Interviews, Survey Team, 2012

In the imports table below, there are miscellaneous imported items, such as animals feed, chemicals, electronics, fertilizer, etc. Most use containers and some use bulk for packing. The ports of origin are mostly Korea, China, Singapore, Japan and Madagascar with transshipment ports in Singapore and Port Klang. The major commodities are fertilizer and construction cargo.

**Table 3.42** – Summary of Imports Logistics of Cargo Stakeholders, 2011 (Belawan and Medan)

| Commodity | | | Avg. Monthly Tonnage (ton) | Type of Packing | Port | | |
|---|---|---|---|---|---|---|---|
| SITC | Commodity Classification | Specific Products of Stakeholders | | | Origin | Transshipment | Destination |
| 08 | Feedstuff for animals (excluding unmilled cereals) | Animal feed | 600 | container | Korea | Singapore | Belawan |

| Commodity | | | Avg. Monthly Tonnage (ton) | Type of Packing | Port | | |
|---|---|---|---|---|---|---|---|
| SITC | Commodity Classification | Specific Products of Stakeholders | | | Origin | Transshipment | Destination |
| 5 | Chemical and related products, n.e.s. | Chemical | 375 | container | Shanghai | Port Klang | Belawan |
| 59 | Chemical materials and products, n.e.s. | Chlorine | 48 | container | Pasir Gudang | Port Klang | Belawan |
| 89 | Miscellaneous manufactured articles, n.e.s | Electronics | 560 | container | Laem Chabang | Singapore | Belawan |
| 89 | Miscellaneous manufactured articles, n.e.s | Empty drum | 1300 unit | container | Singapore | | Belawan |
| 56 | Fertlizer other than group 272 | Fertilizer | 1000 | Containe r, bulk | Shanghai | Singapore | Belawan |
| 74 | Other industrial machinery and parts | Automotive sparepart | 375 | container | Japan | Singapore | Belawan |
| 66 | Non metallic mineral manufactures, n.e.s. | Gypsum powder | 550 | container | Bandar abbas | | Belawan |
| 5 | Chemical and related products, n.e.s. | Chlorine | 32 | container | Madagascar | | Belawan |
| 81 | Prefabricated buildings, sanitary, heating and lighting fixtures, n.e.s. | Construction cargo | 1000 | Containe r, bulk | Shanghai | Singapore | Belawan |
| 02 | Dairy products | Food | 450 | container | Shanghai | Port Klang | Belawan |
| 52 | Inorganic chemical | Bentonite | 250 | container | Chennai | | Belawan |
| 65 | Textile yarn and related products | Textile | 225 | container | Shanghai | Port Klang | Belawan |
| TOTAL | | | 5,465 | | | | |

**Source:** Belawan and Medan Stakeholder Interviews, Survey Team, 2012

For projected exports, the respondents forecast that exports for areca nut, resin stone and cinnamon skin will increase in 2015 with destinations to China, India and Bangladesh as shown in the table below.

**Table 3.43** – Projected Exports of Stakeholders as Potential Cargo for the Belawan – Penang – Phuket RO-RO Route, 2015 (Belawan and Medan)

| Commodity | Avg. Monthly Tonnage (ton) | Type of Packing | Port of Origin | Transshipment Port | Port of Destination | Consumption Region |
|---|---|---|---|---|---|---|
| Rubber | 600 | Container | Belawan | | Busan | |
| Glycerin | 1,050 | Container | North Sumatera | | Shanghai | |
| Vegetables | 50 | Break bulk | Brastagi | | Penang and Singapore | |

| Commodity | Avg. Monthly Tonnage (ton) | Type of Packing | Port of Origin | Transshipment Port | Port of Destination | Consumption Region |
|---|---|---|---|---|---|---|
| Areca nut | 201,880 | Container | Aceh, Padang | | Karachi, Mongolia, Nepal, Chennai, India | |
| Cinnamon skin | 35,000 | Container | Belawan | | China | |
| Fish | 50 | Break bulk | Aceh | | Penang and Singapore | |
| Gambir | 375 | Container | Lampung | | Calcutta | |
| Resin stone | 80,000 | Container | Belawan | | Bangladesh | |
| CPO | 900 | Container | North Sumatera | | Nigeria | |
| Chemical | 75 | Container | North Sumatera | | Tokyo | |
| TOTAL | 319,980 | | | | | |

**Source:** Belawan and Medan Stakeholder Interviews, Survey Team, 2012

Fertilizer is forecasted as the biggest import in 2015, followed by animal feed, food, chemicals, automotive spare parts, and textile (see Table 3.44). These are mostly packed in containers, except for fertilizer which is also transported in bulk. These will be imported from China, Belgium, Korea and Japan.

**Table 3.44** – Projected Imports of Stakeholders as Potential Cargo for the Belawan – Penang – Phuket RO-RO Route, 2015 (Belawan and Medan)

| 2015 Projected Imports | | | | | | | 2011 Trade |
|---|---|---|---|---|---|---|---|
| Commodity | Avg. Monthly Tonnage (ton) | Type of Packing | Port of Origin | Transshipment Port | Port of Destination | Consumption Region | |
| Animal feed | 600 | Container | Korea | | Belawan | Animal feed | |
| Chemical | 375 | Container | China | | Belawan | Chemical | |
| Fertilizer | 1,000 | Container, bulk | Belgium, China | | Belawan | Fertilizer | |
| Automotive sparepart | 375 | Container | Japan | | Belawan | Automotive sparepart | |
| Food | 450 | Container | China | | Belawan | Food | |
| Textile | 225 | Container | China | | Belawan | Textile | |
| TOTAL | 3,025 | | | | | | |

**Source:** Belawan and Medan Stakeholder Interviews, Survey Team, 2012

### 3.4.3 Travel/ Tourism Stakeholders

Related to tourism activities in Medan, the number of tourists handled by responding tour and travel companies has shown a steady increase, from 8,667 in 2009 to 11,051 in 2011 (see Table 3.45). Inbound tourists, mostly domestic, account for most of this tourist traffic. International tourists coming to Medan and Belawan come from the USA, New Zealand, Singapore, Australia, Germany and Penang.

**Table 3.45** – Sales Performance of Travel and Tour Stakeholders, 2009-2011 (Belawan and Medan)

| | 2009 (Pax) | 2010 (Pax) | 2011 (Pax) | Major Destination/ Originating Countries of International Tourists |
|---|---|---|---|---|
| Outbound Domestic | 821 | 1,096 | 1,662 | |
| Outbound International | 102 | 130 | 450 | Malaysia, Australia, Europe, Netherland, Germany, Genting, KL, Penang |
| *Total Outbound* | *923* | *2,149* | *2,112* | |
| Inbound Domestic | 5,379 | 4,678 | 5,258 | |
| Inbound International | 2,365 | 3,298 | 3,681 | USA, New Zealand, Singapore, Australia, Germany, Penang |
| *Total Inbound* | *7,744* | *7,976* | *8,939* | |
| TOTAL Outbound & Inbound | 8,667 | 10,125 | 11,051 | |

**Source:** Belawan and Medan Stakeholder Interviews, Survey Team, 2012

### 3.4.4 Views and Opinions on the Belawan-Penang-Phuket RO-RO Route

Tables 3.46 and 3.47 summarize the respondents' opinions regarding the planned opening of the RO-RO service with Belawan as a port of call.

**Table 3.46** – Summary of Opinions and Comments of Cargo Stakeholders (Belawan and Medan)

| Potentials and advantages of RO-RO services | Issues and concerns on the RO-RO service |
|---|---|
| Can make transportation business easier for exporting goods by RO-RO service. | RO-RO service must provide enough space for containers to accommodate current and forecasted cargo volumes. |
| RO-RO service could be a sea transport alternative as a fast transport vehicle between islands. | Channel is quite shallow and facility to support this project is still insufficient. |
| RO-RO service can support tourism development in Medan to Penang and also as an alternative medical tourism transport. | Regulation and bureaucracy still quite complicated, they need to be simplified to make process of transporting goods smoother. |
| RO-RO service can accommodate cargo movement easier, especially if accompanied by simplification in customs regulations. | RO-RO service must provide a good scheduling, reliable and competitive fares compared to the other modes of transport. Subsidized fare schemes should be considered to achieve appropriate fare. |
| | Loading and unloading position should be considered so as not to bother other port activities. |

**Source:** Belawan and Medan Stakeholder Interviews, Survey Team, 2012

**Table 3.47** – Summary of Opinions and Comments of Tour and Travel Operators (Belawan and Medan)

| Potentials and advantages of RO-RO services | Issues and concerns on the RO-RO service |
|---|---|
| RO-RO can provide an alternative sea transport that is more convenient, can carry passengers with their vehicles, low cost for tour traveling, constant and reliable schedule. | To provide smooth connection for tourism between two countries, the most important thing is simplify the regulations related to carrying own vehicles across the border. |
| RO-RO is expected to accommodate low level consumers from Belawan to Penang so they can transport easier and cheaper rather than sea transport. | RO-RO design should also consider to provide convenient service for passengers and vehicles with good speed to achieve short sailing time. |
| | If all the facilities and process of RO-RO service can be implemented soon with a good integration then tour and travel operators will be willing to make a new package tour using this service. |

**Source:** Belawan and Medan Stakeholder Interviews, Survey Team, 2012

# 3.5 Phuket

## 3.5.1 General Profile of Stakeholders

The stakeholder survey in Phuket only covered a small sample of 2 cargo stakeholders and 3 travel/tourism stakeholders.

By number of employees, 3 of the respondent companies are small, 1 is medium-sized, and another is large (see Table 3.48). All the travel and tour operators are small, while the medium- and large-sized companies are manufacturers/ distributors.

**Table 3.48** – Distribution of Survey Sample by Employment Size and Type of Business (Phuket)

| Number of Employees | Total Number of Companies by Employment Size | Manufacturer/ Distributor | Travel & Tour Operator |
|---|---|---|---|
| < 10 | 3 | - | 3 |
| % | 60.0 | | |
| 10 – 100 | 1 | 1 | - |
| % | 20.0 | | |
| > 100 | 1 | 1 | - |
| % | 20.0 | | |
| TOTAL | 5 | 2 | 3 |
| % | 100.0 | 40.0 | 60.0 |

**Source:** Phuket Stakeholder Interviews, JICA Study Team, 2012

## 3.5.2 Cargo Stakeholders

The two manufacturers/ distributors is an exporter and the other, an importer. Their foreign trade situation is shown in Table 3.49.

**Table 3.49** – Summary of Cargo Stakeholders' Profile (Phuket)

| Company (business type) | No. of Employee | Capitalization | Export 2011 | | Import 2011 | | Cargo Handled |
|---|---|---|---|---|---|---|---|
| | | | Volume | Value | Volume | Value | |
| Company A (manufacturer) | 343 | 50 million Baht | 525 TEUs | 25 million USD | n.a. | n.a. | latex glove |
| Company B (distributor) | 40 | n.a. | n.a. | n.a. | 1,000 tons | n.a. | wood door, lumber, plywood |

**Source:** Phuket Stakeholder Interviews, JICA Study Team, 2012

The exporter is a latex glove manufacturer that exports its products mainly to USA, followed by Nigeria and Israel, on a monthly average volume of 53 TEUs in 2011. The company uses Songkhla Port as its origin port, and Penang Port as transshipment for its USA destination (see Table 3.50).

The number of deliveries to USA reaches 17 times every month, at an average of 35 TEUs per month.

**Table 3.50** – Summary of Export Logistics of Cargo Stakeholders, 2011 (Phuket)

| Commodity | | | Avg. Monthly Tonnage (TEU) | Type of Packing | Port | | |
|---|---|---|---|---|---|---|---|
| SITC | Commodity Classification | Specific Products of Stakeholders | | | Origin | Trans-shipment | Destination |
| 62 | Rubber manufactures, n.e.s. | Latex glove | 35 | Containerized | Songkhla | Penang | USA |
| | | | 10 | | Songkhla | - | Nigeria |
| | | | 8 | | Songkhla | - | Israel |
| TOTAL (TEUs) | | | 53 | | | | |

Note: Record from one company only.

**Source:** Phuket Stakeholder Interviews, JICA Study Team, 2012

Even though the company does not export and sell its products to Malaysia at present, it shows an interest in exporting its gloves to Penang—and probably distributed to all of Peninsular Malaysia—via Penang Port in the future, corresponding to the planned RO-RO operation. It projected a total of 70 TEUs monthly to be exported to Penang in 2015 (see Table 3.51).

**Table 3.51** – Projected Export of Phuket Stakeholders as Potential Cargo for the Belawan – Penang – Phuket RO-RO Route, 2015

| Commodity | Avg. Monthly Tonnage (TEU) | Type of Packing | Port of Origin | Transshipment Port | Port of Destination | Consumption Region |
|---|---|---|---|---|---|---|
| Latex glove | 70 | Containerized | Phuket Port | - | Penang Port | Penang |
| TOTAL (TEUs) | 70 | | | | | |

Note: Projection is from one company only.

**Source:** Phuket Stakeholder Interviews, JICA Study Team, 2012

The distributor imported 1,000 MT of wood doors, lumber and plywood in 2011, which it supplied to local shops. It imports its raw material (lumber) from Sumatra. It was reported that the company imported around 100 tons of lumber from Belawan to Phuket via Penang in 2011 (see Table 3.52). Current type of packing is in break bulk or loose, but with the planned opening of the new RO-RO route, the company claimed it can utilize RO-RO by using containers for shipping some 100 TEUs per month of lumber in 2015 (see Table 3.53).

**Table 3.52** – Summary of Import Logistics of Cargo Stakeholders, 2011 (Phuket)

| Commodity | | | Avg. Monthly Tonnage (TEU) | Type of Packing | Port | | |
|---|---|---|---|---|---|---|---|
| SITC | Commodity Classification | Specific Products of Stakeholders | | | Origin | Transshipment | Destination |
| 24 | Cork and wood | Lumber | 100 | Break bulk/ loose | Belawan | Penang | Phuket |
| TOTAL (TEUs) | | | 53 | | | | |

Note: Record from one company only.

**Source:** Phuket Stakeholder Interviews, JICA Study Team, 2012

**Table 3.53** – Projected Import of Phuket Stakeholders as Potential Cargo for the Belawan – Penang – Phuket RO-RO Route, 2015

| Commodity | Avg. Monthly Tonnage (TEU) | Type of Packing | Port of Origin | Transshipment Port | Port of Destination | Consumption Region |
|---|---|---|---|---|---|---|
| Lumber | 100 | Containerized | Belawan | - | Phuket | Phuket |
| TOTAL (TEUs) | 100 | | | | | |

Note: Projection is from one company only.

**Source:** Phuket Stakeholder Interviews, JICA Study Team, 2012

### 3.5.3 Travel/Tourism Stakeholders

The three small-sized tour and travel agents interviewed in Phuket all handle international travel and tour services. Malaysia, Myanmar, Singapore, South Korea, Hong Kong and China are indicated as their major destination countries for international outbound travel. Their combined total international outbound tourist traffic of 1,530 per month in 2011 is modestly projected to increase to 1,630 in 2015 (see Table 3.54).

**Table 3.54** – Monthly Sales Performance of Travel and Tour Stakeholders in 2011 and Forecast in 2015 (Phuket)

| Country Destination | 2011 (Pax/month) | Forecast 2015 (Pax/month) | Major Destination |
|---|---|---|---|
| Malaysia | 580 | 480 | Penang, Kuala Lumpur |
| Myanmar | 300 | 300 | Toa Island |
| Singapore | 200 | 300 | |
| South Korea | 300 | 300 | |
| Hong Kong | 50 | 50 | - |
| China | 100 | 200 | |
| TOTAL International Outbound | 1,530 | 1,630 | |

Note: Data is from three companies.

**Source:** Phuket Stakeholder Interviews, JICA Study Team, 2012

### 3.5.4 Views and Opinions on the Belawan-Penang-Phuket RO-RO Route

Tables 3.55 and 3.56 summarize the opinions of the Phuket stakeholders on the planned RO-RO shipping service with Phuket as one of the ports of call.

**Table 3.55** – Summary of Opinions and Comments of Cargo Stakeholders (Phuket)

| Potentials and advantages of RO-RO services | Issues and concerns on the RO-RO service |
|---|---|
| If RO-RO is operated, they can import about 1-2 containers per time. They do not need to rent a whole ship to import goods. | Transport time and cost should be lower than road transport. |
| RO-RO is relative cheaper than using air transport. | Transport cost including truck cost from factory to Phuket Port should be less than truck cost from factory to Penang Port in the present about 40-50%. Schedule should meet a vessel's schedule at Penang Port. |
| | This RO-RO project has to plan export matters carefully. |
| | Facility and operation plan of Phuket port should be improved to support cargo service because now passenger vessel is the first priority to them. |
| | Vessel line that operates in this route should meet demand for their customers. |

**Source:** Phuket Stakeholder Interviews, JICA Study Team, 2012

**Table 3.56** – Summary of Opinions and Comments of Travel/Tourism Stakeholders (Phuket)

| Potentials and Advantages of RO-RO Services | Issues and Concerns on the RO-RO Service |
|---|---|
| RO-RO project will increase number of transfer tourists and it will increase income. | Time schedule (punctual) is the most important factor that should be considered for RO-RO operation because it should meet demand of business in order to compete with other transport modes. |
| Will improve opportunity in business, save transport cost and increase the number of tourists especially from Malaysian side. | For tourism who usually rent a car should be interested in this service because they can rent a car and travel with RO-RO service to any destination. |
| | Foreigner tourists like to travel by ship but Thai tourists do not like this mode. So, tourists from Thailand may be low for this RO-RO service; Travel time of RO-RO service should be one factor that should be considered. |

**Source:** Phuket Stakeholder Interviews, JICA Study Team, 2012

## 3.6 Dumai and Pekanbaru

### 3.6.1 General Profile of Stakeholders

Forwarding companies comprise the most number (almost half) of the total 15 survey respondents in Dumai and Pekanbaru (see Table 3.57). Travel and tour agents are the next biggest group, followed by manufacturers, traders and distributors. In terms of location distribution, there are more respondents in Pekanbaru than in Dumai. In this region, Pekanbaru is the center of almost all economic activities including trade, industry and tourism. Industries and businesses usually open their factories in Dumai but also operate their administrative offices in Pekanbaru. This way, according to the respondents, is more efficient and effective for their businesses since the distance between Dumai and Pekanbaru is far enough and traffic conditions along the connecting highway is not ideal. The four Dumai-based respondents were included in the survey to understand the conditions in the field, especially those related to industrial activities.

**Table 3.57** – Distribution of Survey Sample by Type of Stakeholder (Dumai and Pekanbaru)

| | Shipper / Manufacturer / Processor | Trader / Distributor / Retailer | Freight Forwarder | Travel & Tour Operator | TOTAL |
|---|---|---|---|---|---|
| Pekanbaru | 0 | 1 | 5 | 5 | 11 |
| Dumai | 2 | 1 | 1 | 0 | 4 |
| Total | 2 | 2 | 6 | 5 | 15 |
| % | 13.33 | 13.33 | 40.00 | 33.3 | 100.00 |

**Source:** Dumai and Pekanbaru Stakeholder Interviews, Survey Team, 2012

### 3.6.2 Cargo Stakeholders

Mining, fishery and agricultural products, as well as pulp and paper, are the most dominant commodities in Riau Province. Businesses handling these commodities are growing rapidly. Some of them are large companies, especially the pulp and paper manufacturers. The 10 cargo stakeholders include 6 forwarders, an agricultural producer, a manufacturer and a trader (see Table 3.58). According to most forwarding companies, some of the commodities usually distributed from Riau to Malacca by cargo vessels include paper, coffee, plywood, construction goods, vegetables, rubber, and mining products. In this case, Riau Province has two important gateways for cargo, namely Prawang Port and Dumai Port. Between these two, Prawang handles one of the largest port traffic in the province and is able to handle containers.

**Table 3.58** – Cargo Stakeholders by Type of Business (Dumai and Pekanbaru)

| Item | | Forwarder | Trucking | Agricultural Producer | Fishery Producer | Agriculture/Fishery Processor | Manufacturer (Non-Agriculture / Fishery) | Distributor / Trader / Wholesale Dealer | Others | Total (N) |
|---|---|---|---|---|---|---|---|---|---|---|
| Main Business | No. | 6 | 0 | 1 | 0 | 0 | 1 | 1 | 1 | 10 |
| | % | 60 | 0 | 10 | 0 | 0 | 10 | 10 | 10 | 100 |
| Business Activities | No. | 6 | 0 | 1 | 0 | 0 | 1 | 1 | 1 | 10 |
| | % | 60 | 0 | 10 | 0 | 0 | 10 | 10 | 10 | 100 |

**Source:** Dumai and Pekanbaru Stakeholder Surveys, JICA Study Team, 2012

Based on capitalization and employment size, Pekanbaru and Dumai have many business entities, from micro to large companies. However, the survey was able to cover 7 small and 3 large companies (in terms of employment size) and 5 medium and 5 large companies (in terms of capitalization), as shown in Table 3.59.

Among the respondents, the biodiesel and food manufacturing company is the biggest, with almost 2,000 workers and IDR250 trillion worth of assets. It produces biodiesel, cooking oil, margarine, and other complementary foods. Five forwarders also have large assets of more than IDR250 billion.

**Table 3.59** – Cargo Stakeholders by Company Size (Dumai and Pekanbaru)

| Company Size (Shippers) | No. of Co by Employment Size | No. of Co. by Capitalization | Forwarder | Trucking | Agricultural Producer | Fishery Producer | Agriculture/ Fishery Processor | Manufacturer (Non-Agriculture/ Fishery) | Distributor/ Trader/ Wholesale Dealer |
|---|---|---|---|---|---|---|---|---|---|
| Micro | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| % | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Small | 7 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| % | 70.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Medium | 0 | 5 | 1 | 0 | 1 | 0 | 0 | 1 | 2 |
| % | 0.00 | 50.00 | 10.00 | 0.00 | 10.00 | 0.00 | 0.00 | 10.00 | 20.00 |
| Large | 3 | 5 | 5 | 0 | 0 | 0 | 0 | 0 | 0 |
| % | 30.00 | 50.00 | 50.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| no answer | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| % | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Total | 10 | 10 | 6 | 0 | 1 | 0 | 0 | 1 | 2 |
| % | 100 | 100 | 60.00 | 0.00 | 10.00 | 0.00 | 0.00 | 10.00 | 20.00 |

**Source:** Dumai and Pekanbaru Stakeholder Surveys, JICA Study Team, 2012

Manufacturers are the most active exporters in Riau Province. From the interviews, they shipped out at least 720,000 tons of cargo in 2011 (see Table 3.60). This is the largest volume compared to export activities of other entities. In terms of imports, distributors are the most active importers.

**Table 3.60** – Export Volume and Value of Cargo Stakeholders by Nature of Business, 2011 (Dumai and Pekanbaru)

| Main Business | Exports | | | | Imports | | | |
|---|---|---|---|---|---|---|---|---|
| | Volume | | Value | | Volume | | Value | |
| | ton | % | IDR | % | ton | % | IDR | % |
| Forwarding | 255,000 | 16.54 | 55,510,000 | 5.92 | 0 | 0.00 | - | - |
| Trucking | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | - | - |
| Agricultural Producer | 15,000 | 0.97 | 0 | 0.00 | 10,000 | 7.69 | - | - |
| Fishery Producer | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | - | - |
| Agriculture/Fishery Processor | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | - | - |
| Manufacturer (Non-Agri/Fishery) | 720,000 | 46.69 | 705,600,000 | 75.26 | 0 | 0.00 | - | - |
| Distributor/Trader/Wholesale Dealer | 552,000 | 35.80 | 176,400,000 | 18.82 | 120,000 | 92.31 | - | - |
| Total | 1,542,000 | 100.00 | 937,510,000 | 100.00 | 130,000 | 100.00 | - | - |

Note:
1 USD = 9,578.54 IDR (by OANDA Converter)
Export value only filled by 3 companies representing 1 forwarding, 1 manufacturing, and 1 trader
No one from the two importer companies filled the import value

**Source:** Dumai and Pekanbaru Stakeholder Surveys, JICA Study Team, 2012

Riau Province has 2.3 million ha of oil palm plantations, which produce 6-7 million tons of crude palm oil (CPO) per year. It also produces high quality crude oil and is home to Chevron and Pertamina oil companies.

According to respondents, most of the export cargoes are complementary foods such as margarine and cooking oil, mining products such as coal, CPO, and manufactures such as pulp and paper, biodiesel, fertilizer and wood (see Table 3.61). They export their products all over the world with Malaysia, China and European countries as the major destinations. In terms of export process, most respondents transport their cargo via Dumai Port and Prawang Port. Other than export to Malaysia, most of the cargoes are transshipped to Singapore before reaching their final destinations. Nevertheless, Dumai-Malacca is a favorable shipping route for most respondents exporting to Malaysia.

Vegetables, fish, cigarettes, etc. are shipped to Malacca on traditional wooden-hulled boats. In return, cement and consumer goods are brought to Dumai. Any official cargo data on traditional trade only captures those from the PELINDO port and excludes those traded outside the port. It is estimated that PELINDO traditional trade data is less than 50% of the actual total trade.

In case of export and import with Malaysia, both countries face several obstacles. For example, Malaysian security policy prohibits several Indonesian potential products such as mango, salak and batik to be exported to Malaysia. Indonesian exporters question this policy. Therefore, further cooperation is expected by most of the stakeholders to smoothen the trade interaction between countries. Table 3.62 summarizes the import activities of the respondents by type of cargo and port used. The data were taken from a limited number of respondents who answered the import questions in the questionnaires.

**Table 3.61** – Summary of Exports Logistics of Cargo Stakeholders, 2011 (Dumai and Pekanbaru)

| SITC Class-ification | Commodity Classification | Specific Products of Stakeholders | Avg. Monthly Tonnage (ton) | Type of Packing | Ports of Origin | Transshipment Ports | Destination Ports |
|---|---|---|---|---|---|---|---|
| 21 | Hides, skins and furskins, raw | Palm kernel expeller | 100 | Bulk | Prawang (Pekanbaru) | Singapore | Netherlands (Rotterdam) |
| 24 | Cork and wood | Wood | 8,000 | Bulk | Prawang (Pekanbaru) | - | Malaysia (Malacca) |
| 25 | Pulp and waste paper | Pulp | 14,000 | Break bulk (boxes) | Prawang (Pekanbaru) | Malacca | Malaysia (Malacca), Saudi Arabia |
| 29 | Crude animal and vegetable material | Palm shell | 8,000 | Bulk | Prawang (Pekanbaru) | - | Malaysia (Malacca) |
| 32 | Coal, coke, and briquettes | Coal | 20,000 | Bulk | Prawang (Pekanbaru), Sei Pakning (Pekanbaru), Dumai | Malacca, Singapore | Malaysia, China, Europe, |
| 43 | Processed animal and vegetable oils and fats | Cooking oil, margarine, biodiesel, CPO | 1,107,000 | | Dumai | Malacca, Singapore | Singapore, China, India, Netherlands, Malaysia |
| 51 | Organic chemicals | Fertilizer | 25,000 | | Dumai | | Malaysia |
| Total | | | 1,182,100 | | | | |

**Source:** Dumai and Pekanbaru Stakeholder Surveys, JICA Study Team, 2012

**Table 3.62** – Summary of Imports Logistics of Cargo Stakeholders, 2011 (Dumai and Pekanbaru)

| SITC Class-ification | Commodity Classification | Specific Products of Stakeholders | Avg. Monthly Tonnage (ton) | Type of Packing | Ports of Origin | Transshipment Ports | Destination Ports |
|---|---|---|---|---|---|---|---|
| 03 | Fish, Crustaceans, mollusks and preparations | Fish product | 6,000 | Boxes (frozen) | China | Malacca | Pekanbaru (Prawang Port) |
| 11 | Beverages | Beverages | 2,000 | Boxes | China | Malacca | Pekanbaru (Prawang Port) |
| 51 | Organic chemicals | Fertilizer | 10,000 | Bulk | Egypt, Canada, Australia | Malaysia | Dumai |
| 59 | Chemical materials and products | Methanol | 10,000 | Bulk | Malaysia, South Korea | | Dumai |
| Total | | | 28,000 | | | | |

**Source:** Dumai and Pekanbaru Stakeholder Surveys, JICA Study Team, 2012

Fertilizer and CPO are prospective export commodities considered by respondents (see Table 3.63). Moreover, they predicted that future trade patterns would place Riau Province as the central point for export and import of Western and Southern Sumatra markets. Riau Province plans to complete the Pekanbaru-Dumai toll road (200 km) in 2015, which is expected to accommodate increased cargo movements among regions as well as from/to hinterlands. Potential hinterlands are Padang, Bukittinggi and Jambi, outside internal Riau Province cities and districts.

In case of imports, Malaysia is the dominant origin country. Imported commodities include food and beverage, clothes, CPO, methanol, and electronics (see Table 3.64). However, according to the respondents, at least two commodities, methanol and food and beverage, are shipped from Malaysia with a total volume of 15,000 tons/month.

**Table 3.63** – Projected Exports of Pekanbaru/Dumai Stakeholders as Potential Cargo for the Dumai-Malacca RO-RO Route, 2015

| Commodity | Avg. Monthly Tonnage (ton) | Type of Packing | Port of Origin | Trans-shipment Port | Port of Destination | Consumption Region (Destination) |
|---|---|---|---|---|---|---|
| Palm Shell | 8,000 | Not specified | Pekanbaru | | Malacca | Malaysia |
| Fertilizer | 450,000 | Not specified | Dumai | Singapore | Malaysia, Singapore, China, Europe | Malaysia, Singapore, China, Europe |
| CPO | 42,000 | Not specified | Dumai | | Malaysia, China, Europe | Malaysia, Singapore, China, Europe |
| Cooking oil | 15,000 | Not specified | Dumai | | Malaysia, China, Europe (Netherlands) | Malaysia, Singapore, China, Europe |
| Total Exports | 515,000 | | | | | |

**Source:** Dumai and Pekanbaru Stakeholder Surveys, JICA Study Team, 2012

**Table 3.64** – Projected Imports of Pekanbaru/Dumai Stakeholders as Potential Cargo for the Dumai-Malacca RO-RO Route, 2015

| Commodity | Avg. Monthly Tonnage (ton) | Type of Packing | Port of Origin | Transshipment Port | Port of Destination |
|---|---|---|---|---|---|
| Food products and beverages | 5,000 | boxes | Malaysia | | Pekanbaru |
| Methanol | 10,000 | bulk | Malaysia, South Korea | | Dumai |
| Total Imports | 15,000 | | | | |

**Source:** Dumai and Pekanbaru Stakeholder Surveys, JICA Study Team, 2012

### 3.6.3 Travel/ Tourism Stakeholders

Basically, Riau Province is not considered as a popular tourism destination in Indonesia. There are limited tourist attractions in the area. The most visited is Pekanbaru City as the center of shopping and Malayan cultural center. Outside the city, there are several beach attractions in Rupat Island and Bengkalis Main Island, but the sites are not yet developed by the government. Lack of infrastructure, tourism activities, and information become the factors that make Riau Province tourism sites only visited by limited number of tourists. In fact, there is a pattern that Malaysian or Singaporean tourists visit Pekanbaru, stay for transit before continuing their travel to Padang or Bukittinggi for cultural and other tourism activities.

The survey interviewed travel agent respondents. The most common business activities engaged in by the travel agents are ticketing, hotel reservations, and outbound tour packages (see Table 3.65). The total outbound and inbound tourists they handled has been increasing, from about 494,000 in 2009 to 1.2 million in 2011. According to them, the number of outbound tourists is higher because of short business/ tourism travelers. For example, many Pekanbaru people go to Bandung, Jakarta, Singapore, and Kuala Lumpur by airplane. In addition, Riau people also prefer traveling by ferry. This way, they use Malacca as a gateway to visit Kuala Lumpur.

**Table 3.65** – Travel Sales Performance of Travel and Tour Stakeholders, 2009-2011 (Dumai and Pekanbaru)

| | 2009 | 2010 | 2011 | Major destination/ originating country of international tourist |
|---|---|---|---|---|
| Outbound Domestic | 173,500 | 499,100 | 651,500 | |
| Outbound International | 161 | 281 | 300 | Hong Kong, Singapore, Thailand, Malaysia, USA, Japan, Korea, China, Dubai, Qatar, Middle East, Indonesia, UK, Canada, New Zealand, Australia |
| *Total Outbound* | *173,661* | *499,381* | *651,800* | |
| Inbound Domestic | 290,200 | 470,250 | 550,250 | |
| Inbound International | 55 | 75 | 112 | Hong Kong, USA, Dubai, Qatar, Singapore, Thailand, Malaysia, Japan, Korea, China, Indonesia, Canada, New Zealand, Australia |
| *Total Inbound* | *290,255* | *407,325* | *550,362* | |
| Total Outbound & Inbound | 493,916 | 906,706 | 1,202,162 | |

**Source:** Dumai and Pekanbaru Stakeholder Surveys, JICA Study Team, 2012

### 3.6.4 Views and Opinions on the Dumai-Malacca RO-RO Route

The tables below summarize the opinions of the respondents regarding the opening of a RO-RO service with Dumai as a port of call.

**Table 3.66** – Cargo Stakeholders' Opinions on the Dumai-Malacca RO-RO Route (Dumai and Pekanbaru)

| Potential and advantages of RO-RO service | Issues and concerns on the RO-RO service |
|---|---|
| RO-RO can help small and medium exporters or importers to do their businesses. | Many businesses are doing their shipping by their own vessels and port. |
| RO-RO carrying vehicles would be useful for Riau people since many of them often visit Malacca. | Trade agreement between Indonesia and Malaysia must be evaluated, especially for the trade barrier on specific commodities. |
| RO-RO provides service alternative to connect to Malacca by cheaper fares. | RO-RO operation may increase the smuggling if customs officers do not improve their control. |
| RO-RO encourages hinterlands of Riau province to export their commodities via Dumai. | Dumai-Pekanbaru is quite far and has bad accessibility, therefore without road improvement; RO-RO may not be effectively utilized by traders in Riau hinterlands. |
| | RO-RO will be the competitor for current ship operators of Dumai-Malacca. |

**Source:** Dumai and Pekanbaru Stakeholder Surveys, JICA Study Team, 2012

**Table 3.67** – Tourism Stakeholders' Opinions on the Dumai-Malacca RO-RO Route (Dumai and Pekanbaru)

| Potential and advantages of RO-RO service | Issues and concerns on the RO-RO service |
|---|---|
| RO-RO can be good alternative to airplane for traveling abroad, especially with cheaper fares. | RO-RO may not be suitable for tourism activities since the vessel condition is mixed with cargo. |
| RO-RO can carry coach bus and passenger vehicles, including rescue cars, since many potential tourists from Riau visit Malaysia for medical purposes (less cost in this way). | RO-RO is slower than airplane; without competitive ticket fares, RO-RO may lose the competition with airplane, which offer cheap fares to Singapore and Malaysia. |
| Travel agents can increase their business by offering tourism package by RO-RO, shuttle bus service from Pekanbaru to Dumai, and ticketing agents. | |

**Source:** Dumai and Pekanbaru Stakeholder Surveys, JICA Study Team, 2012

## 3.7 Malacca

### 3.7.1 General Profile of Stakeholders

The stakeholder interview survey in Malacca covered a small sample of 8 respondents (see Table 3.68). The three traders deal mainly with coal, petroleum products, and clothing and accessories. The tourism service operators include three travel and tour operators handling mainly ticketing and hotel reservations, outbound and inbound tours, transport services, and general sales agent services for airlines; a hotel; and a hospital that caters to medical tourists.

**Table 3.68** – Distribution of Survey Sample by Type of Business and Size (Malacca)

| Company size | Total No. of companies by employment size | Trader/ distributor/ retailer | Travel and tour operator | Hotel | Hospital |
|---|---|---|---|---|---|
| Small | 7 | 3 | 3 | 1 | - |
| % | 87.5 | | | | |
| Medium | 1 | - | - | - | 1 |
| % | 12.5 | | | | |
| Large | - | - | - | - | - |
| % | 0.0 | | | | |
| TOTAL | 8 | 3 | 3 | 1 | 1 |
| % | 100.0 | 37.5 | 37.5 | 12.5 | 12.5 |

Note: Company size is based on the number of employees: Small - Up to 50; Medium - 51-150; Large - over 150.

**Source:** Malacca Stakeholder Interviews, JICA Study Team, 2012

Except for the medium-sized state hospital, all the other companies are small, with total number of employees below 50. The levels of capitalization and gross sales vary among the companies. The companies have an average capitalization of USD310,000 but their respective annual gross sales widely range from USD150,000 to USD50 million.

### 3.7.2 Cargo Stakeholders

One of the traders imported 65,000 MT of coal monthly from East Kalimantan, Indonesia in 2011 (see Table 3.69). This is delivered once a month in bulk by Panamax size bulker to Port Dickson or the private bulk ports near the coal-fired power plants of the Malaysian electric company. Trading arrangement is by freight on board (FOB) basis and the government-owned power company takes care of all shipping arrangements.

**Table 3.69** – Summary of Import Logistics of Cargo Stakeholders, 2011 (Malacca)

| Commodity | | | Avg. monthly tonnage (ton) | Type of packing | Port | | |
|---|---|---|---|---|---|---|---|
| SITC | Commodity classification | Specific products of stakeholders | | | Origin | Transshipment | Destination |
| 04 | Cereal & preparations | Rice | *Not specified* | 50kg, 20kg and 10kg packs | Thailand, Vietnam, India | | Malacca |
| 32 | Coal, coke and briquettes | Coal | 6,500.0 | Bulk | East Kalimantan | | Port Dickson, private bulk ports |
| 33 | Petroleum, petroleum products, and related materials | Gasoline, petroleum products | *Not specified* | Bulk | Domestic (already gets from local oil company) | | |
| 84 | Articles of apparel and clothing accessories | Clothes, handbags, accessories, etc. | 0.9 | Boxes | Bandung, Bangkok (airports) | | Malacca (airport) |
| TOTAL | | | 6,500.9 | | | | |

Note: Two respondents did not provide information on tonnage.

**Source:** Malacca Stakeholder Interviews, JICA Study Team, 2012

The clothes and accessories trader also has a building maintenance and cleaning service business, and also trades construction materials and other consumer goods. Her children periodically (once or twice a month) go to Bandung, Indonesia by air and to Bangkok, Thailand either by train or by air to buy clothes, bags, accessories, etc. for retailing in Malacca mainly through internet. In 2011, they hand-carried some 30 cases of these products per trip by themselves so they never paid import tax in Malaysia.

The petroleum products dealer has two gasoline stations and also trades rice. Both are largely subsidized commodities requiring business licenses. He gets petroleum products from Petron (manufacturer and distributor of petroleum products) in bulk and his rice, in 50kg/ 20kg/ 10kg packs, from Bernas (which is the sole importer of rice from Thailand, Vietnam and India). The company owns a 3-ton capacity truck for loading cargo. He did not specify his cargo volumes.

The cargo stakeholders did not provide any projections for 2015, though they generally considered the opening of the RO-RO route as beneficial to increased trade and business opportunities with Indonesia.

### 3.7.3 Travel/Tourism Stakeholders

The travel and tour operators, together with the hotel and hospital, handled at least 321,200 tourists in 2009, including 300,800 outbound and 20,400 inbound tourists (see Table 3.70). This went up to

401,400 in 2010 and further rose to 504,100 in 2011, for an average annual increase of 25%. Most of the outbound tourists go to Indonesia, Thailand, China, Taiwan, Korea, Europe and Saudi Arabia (mostly for the pilgrimage tours). Inbound international tourists mainly come from Indonesia, Thailand, China, Taiwan, Korea and other ASEAN countries. Domestic inbound tourists come from around Malacca, Genting, Cameron, Langkawi, Kuching and Kota Kinabalu.

It is interesting to note from the reports of both the hotel and the state hospital that most (up to 90%) of their clients are medical tourists. Some 70% of these are Indonesians from Pekanbaru, Jambi, Dumai, Palembang, Bengkalis, and other cities in Sumatra and Riau Province. Nowadays, they also get some customers from Java, Kalimantan and even Papua. For marketing, the hotel utilizes internet booking and their connection with Malacca hospitals. The hospital also has agents in several places around Indonesia to assist clients who want to seek medical services in Malacca.

**Table 3.70** – Sales Performance of Travel and Tour Stakeholders, 2009-2011 (Malacca)

| | 2009 (Pax) | 2010 (Pax) | 2011 (Pax) | Major destination/ originating country of international tourist |
|---|---|---|---|---|
| Outbound domestic | ND | ND | ND | |
| Outbound international | 300,800 | 351,000 | 401,200 | Indonesia, Thailand, China, Taiwan, Korea, Europe, Saudi Arabia |
| *Total outbound* | *300,800* | *351,000* | *401,200* | |
| Inbound domestic | 300 | 300 | 550 | Genting, Cameron, Langkawi, Kuching, Kota Kinabalu, Malacca |
| Inbound international | 20,100 | 50,100 | 102,350 | Indonesia, Thailand, China, Taiwan, Korea, other Asian countries |
| *Total inbound* | *20,400* | *50,400* | *102,900* | |
| TOTAL Outbound & Inbound | 321,200 | 401,400 | 504,100 | |
| % growth | - | 25.0 | 25.6 | |

Note: Includes data from 3 travel and tour operators, 1 hotel and 1 hospital. Only one operator provided data on domestic outbound tourists. Data from the hotel and hospital are for 2011 only.

**Source:** Malacca Stakeholder Interviews, JICA Study Team, 2012

The medical tourists come to Malacca by passenger boat (Dumai-Malacca) and airplane. Some from Sumatra fly to Kuala Lumpur and take the land trip to Malacca. Others fly from Pekanbaru-Malacca on the low cost carriers. They stay from a couple of days to two weeks. Many patients prefer to stay at their hotel because hotel room/bed rates are cheaper than those of hospital room/bed. The hotel welcomes those visitors to balance room occupancy rates between weekdays and weekends. Some Indonesian medical tourists are affluent and can afford to stay in Malacca with their families. It is an emerging market compared with previous years where Indonesian visitors were mostly job-seekers. Still, there are many Indonesians working in Malacca, including in the hotel of the survey respondent.

The prices for tour packages depend on the routes and destinations. For example, the 14-day Malacca-Saudi Arabia (through Karachi/ Dacca/ Qatar) tour of one operator costs about USD 1,900 per passenger. The Asian tours of another operator costs from USD630-950 to USD3,150 for a 5-8 days tour. The 4-day Malacca-Indonesia (via Singapore) tour costs about USD240 per passenger.

The tourism stakeholders also did not make provide any projections of their tourist traffic. However, going by their historical data it is estimated that their combined total tourist traffic would almost double to about 1 million tourists by 2015.

### 3.7.4 Views and Opinions on the Dumai-Malacca RO-RO Route

The Malacca stakeholders generally view the opening of the Dumai-Malacca RO-RO shipping route as a positive development. Following are their opinions on the advantages, disadvantages, and expectations from the new shipping service:

1) It will be good for economic activities at both sides and can increase trade. Sumatra exports fish, vegetables (e.g., tomato, cabbage) and fruits (e.g., pineapple) while Malacca exports sugar, biscuits and processed food products. Perishable goods can be transported in good quality. In addition, electric appliances (e.g., air conditioners) and construction materials (tiles, cement, wood, roof plates, etc.) can be transported on the RO-RO.

2) Malacca residents may utilize this new route to go shopping on weekends with their own cars, both for personal consumption and for commerce.

3) The new RO-RO shipping service can encourage more people to travel. Besides the Malacca-Dumai route that supports medical tourism between Indonesia and Malaysia, there is also one passenger ferry service that operated between Bengkalis, Riau and Malacca. Currently people from Bengkalis prefer to visit Malacca directly by ferry rather than use the airplane.

4) Importers of fish and other products must obtain import license and be allocated "quota", which may be obstacles to expanding trade. Quarantine regulations will have to be complied with.

5) If Malacca and Peninsular Malaysia close its market to protect domestic producers through import registration, quota, Singapore may become an alternative market. There is recently observed an increase in Thai trucks to Singapore through the Malaysian North-South Expressway.

6) There should be strict security for vehicles, especially the cars motorcycles, riding on the RO-RO. It has been reported that an average of 10 motorcycles are stolen daily in Malacca.

7) In the case of the Dumai-Malacca route at present, if there is patient that needs to go back to Dumai accompanied by a nurse because of serious illness, they use the passenger ferry and ask the patient to lie down on the seats, which is uncomfortable for the patient. If the RO-RO can accommodate the medical facilities with lower cost than the plane, then the demand for medical tourism will increase.

8) The passenger fare on the RO-RO should be cheaper than that of airlines or speed boat. At least 1/3 the price of an air ticket would be preferable. The Pekanbaru-Malacca airfare on Wings Air or Sky Airlines is around USD60-80 one-way. Flights, however, are limited.

9) The shipping frequency should at least be one roundtrip per day in the starting year, and may be increased when demand increases. The vessel should have a 200-passenger capacity, preferably with special cabins with beds for health service patients.

The tour operators are willing to consider bringing their vehicles across the RO-RO route if the driver's license will be recognized, the drivers will become familiar with the roads and traffic regulations, and safety and security conditions will be ensured at the Indonesian side.

*Meeting with the Customs Agency*

The Survey Team also met with the Malacca Customs Agency to discuss concerns regarding the customs regulations that may be applicable to the ASEAN RO-RO shipping services, particularly on the Dumai-Malacca route. Following are the highlights of the meeting:

1) In both Indonesia and Malaysia, customs regulations and procedures based on national customs laws will still apply regardless of any special bilateral/ regional integration trade arrangement such as the ASEAN RO-RO project.

2) There are some differences in approach between Indonesian and Malaysian customs regulations but they are still in line with international customs conventions under the World Customs Organization (WCO). Among these differences are the value thresholds for passenger goods, amount of customs bond, periodic duties applied for temporary importation, customs documents used for import/ export, re-import, etc. The meeting was of the view that such differences should be harmonized and/or mutually accepted if the ASEAN RO-RO shipping services are implemented.

3) In terms of customs procedures, the most feasible ways to accommodate and facilitate the ASEAN RO-RO project include the following:

    a) Both sides to find any preceding regulations that can be used as best practice for the ASEAN RO-RO project on the proposed routes. One of the best practices to look at is the currently operating Labuan-Muara RO-RO route between Malaysia and Brunei Darussalam.

b) The Survey Team to consider preparing a proposed draft of a new Customs Director-General decree circular that is still in line with current customs regimes in both countries but can help facilitate and expedite movements of cargo and passengers using the ASEAN RO-RO vessels upon implementation.

# ■ Chapter 4 – Conclusion and Recommendations

As in other survey activities, running the stakeholder interview survey for this ASEAN RO-RO study was not free from operational challenges such as tight timetable and budget, logistical difficulties, unavailability and/or lack of interest and participation of some target stakeholders, and lack of access to necessary disaggregated and quality secondary and primary data and information, among others. Despite such challenges, however, the survey exercise is deemed successful in gathering useful information that helped the JICA Study Team conduct an objective and scientific analysis of the viability of opening RO-RO shipping services in the three priority routes of Dumai-Malacca, Belawan-Penang-Phuket, and General Santos-Bitung.

## 4.1 Insights from the Survey Results

The survey results reveal many interesting information that can validate and supplement secondary data gathered during the study's first field survey especially in areas and sectors where such information is either non-existent or lacking. More importantly, the survey is able to provide primary, first-hand information and insights from local stakeholders themselves who are potential users of the intra-ASEAN RO-RO services being planned.

While the level and quality of information gathered by the survey vary across the covered areas, there are some common sentiments evident among the various stakeholder respondents, including the following:

(1) Local stakeholders are generally receptive and welcome the development of RO-RO shipping services across the three priority routes. For both cargo and tourism stakeholders, transport connectivity is very important to promoting international trade and tourism, expanding businesses, improving local economies, enhancing incomes, and promoting international relationships among countries.

(2) With limited or no experience transporting cargo and passengers across the priority routes due to absence or lack of direct shipping services, much less RO-RO services, most stakeholders are not sure how exactly to use the planned RO-RO shipping services and what and how much cargo and passenger traffic they can generate across the routes. Nevertheless, many

are interested to use the RO-RO services if these could connect them to their export markets, import sources and outbound/ inbound destinations in a faster, cheaper and more convenient way.

(3) For them to use it, stakeholders generally require that RO-RO shipping should be able to provide regular, timely, reliable, less costly, safe, comfortable, convenient, and technically appropriate and adequate services.

(4) The development of RO-RO shipping services should have the support of government and private sector institutions as well as the general public. Current cross-border regulatory frameworks, such as those on CIQS, as well as certain trade barriers across the routes should be reviewed and, where appropriate, liberalized and/or reformed to promote RO-RO route development and sustainability.

(5) In developing the RO-RO routes and services, potential risks of smuggling, human trafficking, terrorism, trade imbalances, competition with local industries, etc. should be mitigated.

## 4.2 Lessons Learned from the Survey Process

Following are some key lessons learned from the survey experience which can guide and make more rewarding and meaningful similar activities in the future:

(1) The survey should have very clear objectives and target outputs from the beginning. This will facilitate the smooth conduct of survey activities including overall survey design, sampling framework, budget and time programming, technical and administrative preparations, actual survey management, data processing and analysis, and documentation and reporting. The survey objectives, desired outputs and design should be clearly understood by all members of the survey team.

(2) Sufficient time should be allocated for the conduct of the survey and proper timing should be observed. From hindsight, stakeholder surveys of this size and coverage would ideally need at least three months of preparatory activities and at least two months to complete if done simultaneously by several survey teams.

(3) Target stakeholders should be adequately prepared for the survey. They should be sufficiently informed of the objectives, activities and timetable of the survey way ahead of time. This would contribute to their interest, openness and cooperation with the survey.

(4) Whenever required, confidentiality of survey information should be maintained. Stakeholders can be very wary of surveys asking for information on company finance and operations. They

become more open and cooperative respondents when assured and convinced that survey information will be treated in strict confidence.

(5) Partnering for the survey with local organizations that are reputable and respected in the stakeholder community, have adequate influence and clout, have extensive networks and adequate office resources can facilitate the activities of the survey team. It is important that local survey partner organizations understand and fully support the objectives of the survey.

(6) The survey team should consist of professionals who have adequate skills and familiarity with running surveys. All team members should be properly oriented and prepared on the objectives and design of survey activities.

(7) Needless to say, adequate financial, technical and manpower resources that are commensurate with the design, size and coverage of the survey should be mobilized.

# Annex 2.1

# Guidelines for Survey Managers

**THE MASTER PLAN AND FEASIBILITY STUDY ON AN ASEAN ROLL-ON/ ROLL-OFF (RO-RO) SHIPPING NETWORK AND SHORT SEA SHIPPING**

**GUIDELINES FOR SURVEY MANAGERS OF THE STAKEHOLDER SURVEY**

## Background and Rationale

1. The background of the study and the stakeholder survey and port traffic survey is discussed in the attached Survey Brief. The following guidelines are meant to guide the stakeholder survey managers, supported by their designated local partner organizations in the port areas, in planning and implementing the survey.

## Objective

2. The main objective of the stakeholder survey is to gather primary information on the current and future levels and characteristics of international trading and tourism activities as well as the stakeholders' perceptions about the new RO-RO services being planned in the 3 pilot routes. This information will validate and expand on previous information gathered from the data gathering, stakeholder consultations and ocular visits conducted during the first field surveys of the study, particularly in the areas where there is incomplete or scant information. Such information will serve as inputs to the feasibility study being undertaken for these routes.

## Methodology

<u>Sampling</u>

3. The survey entails the face-to-face interview of a limited sample of stakeholders using a prepared interview questionnaire. The questionnaire will be prepared by the JICA study team[1] with inputs from the assigned route survey managers. A team of surveyors/interviewers will be mobilized to conduct the interviews and to encode/process the survey returns, under the supervision of the survey manager assigned in each of the survey area.

4. The sampling methodology is a stratified purposive sampling. It is purposive in that target stakeholders to be covered by the survey should be organizations that will have interests in the development of RO-RO shipping services in the 3 pilot routes--that is, those that have previous, existing and/or potential international trading or tourism activities across the routes using the partner ports. These will mainly include cargo shippers (export and/or import), forwarders, consignees, and consolidators, as well as travel and tour operators, airline/ passenger shipping service agents, and other tourism organizations dealing with international inbound and outbound passenger movements. Whether or not based within the pilot routes' influence areas (defined as areas that will be impacted upon by RO-RO shipping development in the pilot routes), these stakeholders should be operating and/or planning to operate in the transport corridors of the pilot routes.

5. The target sample in each survey area will be stratified according to type of stakeholders (e.g., shipper, forwarder, tourism organization) and size of establishment (small, medium, large). As majority of businesses in the survey areas are small and medium enterprises (SMEs), and since large companies either have their own private ports and/or deal mostly with large volumes

[1] Dr. Yoshikazu Kanai and Mr. Ronald Sison.

of containerized cargo or bulk cargo that may not be suitable for RO-RO shipping, it is expected that majority of the samples will be SMEs. The distribution of the total target sample by type of business will vary across the survey areas, depending on the universe of business establishments as well as the predominance of industries in each area. Such sample distribution is left at the discretion of the survey managers taking into consideration the proposed selection criteria below.

6. Priority in the selection of target samples for the survey should be given to the following stakeholders:

- Manufacturing companies operating or planning to operate businesses at the partner countries across the routes (e.g., Philippine-Indonesian joint venture fish canneries in Bitung, South Cotabato-based pineapple plantation/ cannery expanding its plantation area in Kalimantan, etc.);
- Companies with existing or future overseas branches at the partner countries;
- Companies supplying or planning to supply products to the partner countries;
- Companies sourcing or planning to source out products from the partner countries;
- Companies exporting to other Asian countries products that are being imported by the partner countries;
- Companies importing from other Asian countries products that are exported by the partner countries;
- Companies providing cargo forwarding services across the partner countries; and
- Companies facilitating the travel of people (e.g., residents, visitors, overseas workers) particularly across the partner countries.

7. It should be noted that some stakeholders who are currently doing business across the partner countries may or may not be using direct air or marine transport routes, including the pilot routes, because of the lack of direct shipping (and/or air) services, costs, or other considerations. In such cases, official records of their trade or tourism flows across the pilot routes may not be readily available, if at all. It will be useful to capture this trading and tourism flow as potential cargo and passenger load for RO-RO shipping.

8. There are also companies which are currently doing or planning to do business across the partner countries that use private ports for their business, not the government ports included in the pilot routes. If there is no prior indication of interest from these companies to divert any part of their business through the government ports in the pilot routes, then these companies should not be included in the sample stakeholders. Such interest or absence of interest should be determined with the assistance of the local survey partner organizations.

9. Together with the local partner organizations and in consultation with relevant business support organizations, the survey managers should come up with a long list of target stakeholders for the survey using the abovementioned selection guidelines. This list will be further filtered and refined to come up with a shortlist of the target 50 stakeholders per area. The shortlist should include a buffer of at least 20 additional stakeholders to replace any of the initial 50 but who may decline to participate.

10. The target is to have at least 50 successful interviews, meaning that the respondents are the appropriate ones and the interview questionnaires are completely and accurately accomplished, with good quality data, within the survey timeframe. There is a risk that not all targeted interviews will be successful for any or a combination of these reasons: (1) the stakeholder initially agrees but later on decides not to push through with the interview; (2) the

interview takes too long to finish because of postponement of interview appointments, interviewee is busy, quality of information is not good and needs to be validated, etc.; (3) the stakeholder selected is not an appropriate choice for the purpose of the survey; or (4) the interviewer does not do a good job. The survey managers should reduce this risk by ensuring as much as possible that the appropriate types of stakeholders are included in the target list for the survey, and that qualified interviewers are hired for the job. It is important that the survey managers select a good set of target stakeholders in consultation with the local partner organizations. It is left to the discretion of the survey managers to target an additional number of interviews (say, 55 or 60) to allow for a buffer against possible unsuccessful interviews.

Survey Organization

11. For this type of survey, interviewers should come from the survey areas and preferably be professionals (not student level) with a facility to talk with senior officers of stakeholder organizations and preferably with a certain level of familiarity with economic and business conditions in the influence areas of their pilot ports. The survey managers can request assistance of the partner organizations in recruiting the interviewers. The survey managers should mobilize enough number of interviewers to complete the survey within the timetable.

Survey Proper

12. Target stakeholders on the final shortlist will be sent invitations/requests to participate in the survey, by email or courier. The letter should include a copy of the questionnaire with route map and RORO operation plan, and general instructions. Where appropriate and however best to encourage stakeholder participation, the letter should be signed either by the head of the partner organization or by the JICA study team leader. The survey managers can help draft the template letters. The survey manager will assign the interviewers their respective stakeholders to contact and interview. The number of assigned stakeholders per interviewer will depend on the number of interviewers mobilized.

13. After sending the requests, the interviewers will initially call their respective assigned stakeholders to confirm their receipt of the invitations and willingness to participate (or not) in the survey, and answer any queries/clarifications by the stakeholders. If willing to participate, the interviewer will ask for the name of the contact person/interviewee and the appointment schedule for the on-site face-to-face interview either at respondent's office or any other convenient location, including the office of the partner organization. An advantage of doing the interviews at the respondents' offices is that they will have ready access to reference documents or records to source information required by the questionnaires. It is possible that for some stakeholders, the survey team would need to call back a few more times to confirm the appointments and interviewees. If the number of willing participants goes below 50, additional stakeholders will be invited from the buffer shortlist.

14. Another option is for the survey manager, assisted by 1 or 2 interviewers to do all the calling and following up for interview appointments. As appointments are confirmed, interviewers are assigned to do the interviews. To save time, interviewers can already do the on-site interviews immediately, even while succeeding appointments are being confirmed. When most of the appointments have been made, the interviewers doing the initial calls can join the conduct of interviews.

15. It is the discretion of the survey managers what would be the suitable transport arrangements for the interviewers, either by group or individual. For time and cost convenience

and whenever possible, each interviewer should be assigned interview appointments within the same vicinity.

16. As soon as accomplished, the survey questionnaires will be submitted to the survey manager for checking and validation. The survey manager can assign one of the interviewers to assist him/her in this task. Questionnaires needing further validation/completion with the stakeholders will be returned to the concerned interviewers for completion. These interviewers will contact the concerned stakeholders for completion of the questionnaires either by phone or on-site interview, whatever is appropriate. The survey manager or his/her assistant will validate the questionnaires again until found acceptable.

Encoding and Processing of Survey Returns

17. The survey managers will assign at least 2 encoders to encode the successfully accomplished questionnaires as they come. The encoders will use a coding template prepared by the JICA study team.[2] The survey managers will monitor and supervise the encoding on the field, ensuring that this task is done properly and efficiently.

18. The coding template will include output tables that should be automatically generated from the encoded returns anytime. The required output tables will be provided by the JICA study team.[3] When at least 50% of the survey returns has been encoded, the encoders can start generating auto tables to indicate trends and patterns that will be used in preliminary analysis. Final output tables will be generated once all the survey returns have been encoded.

Completion of Survey and Turnover of Survey Returns

19. The survey manager will prepare and submit a brief report on the conduct of the survey and any implementation issues and lessons learned. No analysis of the survey returns is required in this report.

20. All accomplished survey questionnaires, encoded files, and output tables generated will be turned over to the JICA study team upon completion of the survey.

[2] Mr. Sison.
[3] All study team members with specific data table requirements.

# Annex 2.2

# Guidelines for Interviewers

THE MASTER PLAN AND FEASIBILITY STUDY ON THE ESTABLISHMENT OF AN ASEAN ROLL-ON/ ROLL-OFF (RO-RO) SHIPPING NETWORK AND SHORT SEA SHIPPING

GUIDELINES FOR INTERVIEWERS FOR THE STAKEHOLDER SURVEY FOR THE GENSAN-BITUNG ROUTE

General:

1. The objective of the stakeholder survey is to gather information on existing and potential trade and passenger traffic between the Philippines and Indonesia, particularly using the Davao/General Santos -- Manado/Bitung transport corridor, as well as stakeholders' perceptions on the possibility of operating a Roll-On/Roll-Off (RO-RO) shipping service between General Santos Port and Bitung Port. The results of the survey will serve as inputs to assessing the feasibility of the planned RO-RO route.

2. Before the on-site, face-to-face interviews, request letters from the JICA study team and the Department of Trade and Industry (DTI) will be sent to the target stakeholders, together with a copy of the questionnaire. The requests will be followed up by the survey team for confirmation of appointments. The survey coordinator will distribute these appointments among the interviewers.

3. The interviewers should always carry with them their survey kits (to be provided by the survey coordinator) with their survey IDs, authorization letters, pencils, blank questionnaire forms, detailed map of Philippines-Indonesia-Malaysia, survey brief, and interviewer's guide.

4. Throughout the conduct of the face-to-face interviews, the interviewers should always be courteous, pleasant and patient with the stakeholder interviewees. They should wear their IDs at all times at the interview sites and during the interviews. At the start of the interviews, the interviewers should introduce themselves and the objective of the survey. For any concern about the confidentiality of survey information, the interviewers should assure the stakeholders that any information gathered from the survey will be used only for the study and will be treated in aggregates/ totals, thus avoiding reference to any specific company or personality.

5. With prior notice about the survey and enough lead time before the on-site interviews, the stakeholder interviewees are expected to have prepared the necessary information required by the survey and, hopefully, will bring with them the accomplished questionnaires during the face-to-face interviews.

   5a. If the stakeholder has accomplished the questionnaire, this should be turned over to the interviewer at the start of the interview session. The interviewer should check the answers for completeness and accurateness. The interview can proceed with the interviewer asking the stakeholder for some clarification or further explanation of their answers and filling up of un-answered questions. To hasten the interview session, the interviewer can skip questions that have been adequately answered or do not need any clarification.

   5b. If the stakeholder has NOT accomplished the questionnaire, the interviewer should proceed with the session by filling up a blank questionnaire as he/she goes through the questions one by one with the stakeholder until all questions have been adequately answered.

   5c. If, during the interview, the stakeholder cannot complete the answers to the questionnaire and requests for more time to complete it, the interviewer can set another appointment to come back for the completed questionnaire. Upon return for the questionnaire, he/she should check if the questionnaire has been completely accomplished and, if not, should have another session with the stakeholder to complete the same.

6. The interviewer should continue probing and encouraging the stakeholder to answer questions completely. For open-ended and enumeration-type questions, the interviewer should ask "anything else/more, sir/ma'am?" before leaving the particular question.

7. Some stakeholders may likely provide more information than what is being asked, sometimes seemingly "unrelated" to the specific questions at hand. The interviewer should note down such additional information on the side margins of the questionnaire or at the back of the sheets (indicate if continued at the back). The encoder and survey analyst can later sort out whether or not this additional information can be useful for the study. It is advisable for the interviewer to voice record, with permission of the stakeholder, the session and to refer to the voice recording later to write in the questionnaire more detailed information from the interview.

8. At the end of the interview session, the interviewer should thank the stakeholder for his/her time and cooperation, and advise him/her that the interviewer will contact him/her again for any additional information that needs to be followed up or clarified. The interviewer should ask for a business card and verify the most convenient contact number to reach the stakeholder and the convenient schedule to call and note these down in the questionnaire. The interviewer should also ask the stakeholder if he/she can recommend other stakeholders whom he/she thinks have business interests with Indonesia and/or can benefit from the planned RO-RO shipping service and, therefore, can be included in the survey. Such referrals can be included in the target survey sample.

## A. Survey of Forwarders, Shippers and Consignees

At the start of the session, the interviewer should indicate in the appropriate box on page 1 his/her name, survey city, sequence number, date and time of the interview. Before proceeding to the Q&A portion of the interview, the interviewer should briefly describe the Gensan-Bitung route with reference to the page on the RORO Shipping Operation Plan and supplemented with the more detailed map.

Q1 to Q4. These questions on basic information about the stakeholder and his/her company should be filled up with complete information on names, address, designation and contact details.

Q3. A **headquarter** is the main/principal office of an organization, usually located in the capital city of the organization's area of operation, or in the nation's capital in the case of those with national operations. A **branch** office usually takes care of the main office's operations in a certain area, and is comprised of smaller divisions of different aspects of the company (e.g., human resources, marketing, accounting, etc.). A branch office will typically have a branch manager who will report directly to, and take orders from, a management member of the main office. A **satellite** office is usually smaller than a branch office and has more limited and specific focus of operation (e.g., marketing, buying, client reception, etc.).

Q5. Type of Business can have multiple answers. Encircle the numbers of all that apply and underline the main business according to the stakeholder.

Q6. To be answered only by producers or processors. Enumerate the major specific products.

Q7. Total number of employees includes all regular, contractual and casual employees.

Q8. Total capitalization amount is based on the company's SEC registration papers. Stakeholder may just give an estimate.

Q9. Total gross sales amount is based on the company's financial statement for 2011. Stakeholder may just give an estimate. Though it is possible that the amount given may be understated (for internal revenue tax considerations), the interviewer should take any given amount at face value and should not question it to avoid antagonizing the stakeholder (and jeopardizing the rest of the interview).

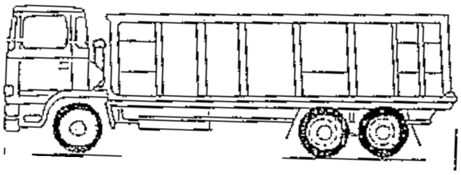
Q10. Data on total TONNAGE of exports and imports is very important for the survey; this is a must-answer item. Information on export/import value is useful but stakeholder can just give estimates and, if he/she cannot or refuses to give estimates, the value portion can be skipped. If the stakeholder needs more time to consult records for export/import tonnage and value, the interviewer can call him/her later to get the information.

Q11. For producers/processors, cargoes handled will most probably be the same as the main products (Q6). For forwarders, cargoes are the products of their respective clients which they handle.

Q12. Containerized cargoes are those transported in container vans all filled by the company's products. Bulk cargoes are those transported unpackaged in large quantities either in liquid, granular, or particulate form as a mass of relatively small solids (e.g., petroleum, oil, grains, gravel, coal, etc.) usually in a bulk carrier or tanker. Breakbulk, loose or general cargoes are those that are transported/loaded individually, not in bulk, and usually comes in bags, sacks, boxes, crates, drums and barrels. Breakbulk cargo may also be transported in container vans that are not solely filled up by the company but shared by several shippers. Total percentage share of containerized, bulk or breakbulk cargoes should equal 100%.

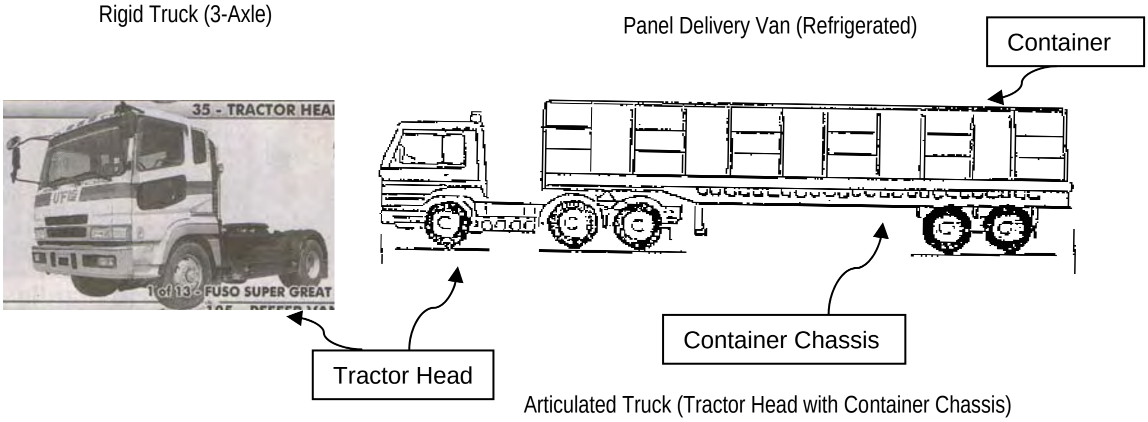
Q13. Encircle the logistics assets owned and/or rented by the stakeholder and indicate in the blank spaces the specific number of units of assets (regardless of size/area or type) owned and/or rented. This question will usually have multiple answers.

- Warehouse is an enclosed facility for storing cargo while awaiting transport to the ports or destination markets. It comes in different area sizes.
- Truck usually has a fixed chassis and can have 2, 3 or 4 axles (see Figure below). Panel delivery vans are included in this category.



Rigid Truck (3-Axle)


Panel Delivery Van (Refrigerated)




Articulated Truck (Tractor Head with Container Chassis)

- Container or container van is the metal box container used to transport cargoes, usually general/loose and dry cargo. It comes in 10-footer, 20-footer and 40-footer sizes. The standard measure for containerized cargo is TEU (twenty-foot equivalent unit). One 40-footer container is therefore equivalent to 2 TEUs. One TEU is roughly 20 metric tons.
- Container Chassis is the part of the articulated truck where container vans are loaded. This is connected and pulled by a tractor head.
- Tractor Head is the motor vehicle that pulls the container chassis. It is also called a primemover.
- Reefer van is a container equipped with refrigeration equipment, for transporting usually fresh and highly perishable commodities. Ports and container yards are usually equipped with reefer van electric terminals where the reefer vans can be plugged while awaiting loading onto the ship.

Q14. The stakeholder may be using several seaports to transport his/her cargo. Indicate which are the major ones (up to 3 ports) and average number of times per month these ports are used. It is possible that the Davao or Gensan ports are not among these ports used. If the frequency of use is less than once per month, indicate the number of times per quarter or per year whichever is appropriate.

Q15. Probe the reasons why the stakeholder prefers to use the ports indicated. If Gensan or Davao ports are not being used, it is important to know why not.

Q16. Check either yes or no. Not applicable may be checked in case either Gensan or Davao ports is not used. Probe reason why these ports are not used. If yes, check the degree of severity of problems with the ports as enumerated in the table.

Q17. For those using Gensan or Davao port, rate stakeholder's satisfaction with shipping services at the ports by checking the appropriate boxes. Probe reasons for his/her ratings and indicate in the follow up question.

Q18. Check either yes or no. If yes, indicate which airports (up to 3 airports) the stakeholder uses, what type of cargo flown in or out, and the specific air route (e.g., Gensan-Manila, Davao-Manila, Gensan-Cebu, etc.).

Q19. The stakeholder can best answer this question if he/she has consulted actual company records before the interview. Indicate actual records of export and import volumes, origin-destination, logistics costs, and rates of delayed or damaged deliveries for 2011 (up to 5 major export and 5 major import commodities only).

- If stakeholder cannot give tonnage, he/she can use number of containers or TEUs (twenty-foot container units). If monthly tonnage/TEUs cannot be estimated, this can be given on a per quarter, per semester, or per year basis.
- Type of packing is the form of packing for transport (containerized or not) and includes boxes, cartons, crates, sacks, bags, drums, barrels, etc.
- If number of deliveries is less than once per month, indicate frequency per quarter or per year.
- Indicate under the column headings the peak months and off-peak months (e.g., November-January, June-August, etc.).
- For logistics chain, it is important to indicate the production area of the commodities, port of origin, transshipment port (if any), destination port, and consumption area.
- Total delivery time is average number of days per shipment from port of origin to destination port.
- Total logistics cost includes all transport costs from production area to consumption area, inclusive of trucking, shipping, loading/unloading, etc.
- Ocean freight service cost is only for the shipping cost from port of origin to destination port. If the company uses logistics providers or forwarders, the ocean freight service cost may be part of the total logistics fees and may not be known to the stakeholder. In such case, the total logistics cost will suffice.
- Rate of delayed delivery is the number of times deliveries were delayed divided by the total number of deliveries (per month, per quarter or per year) x 100.
- Rate of damaged cargo is the number of times cargo was damaged (regardless of extent of damage) divided by the total number of deliveries (per month, per quarter or per year) x 100.

Q20. This question asks the stakeholder for his/her company's projected exports and imports (up to 5 major exports and 5 major imports) in 2015, as well as their willingness to use the new RO-RO shipping service in the particular route. Since forwarders depend on their shipper clients for their export/import cargo transport business, they may find difficulty in projecting such cargo volumes. In such cases, the forwarder may be asked to provide projections based on the historical record of his/her forwarding business.

- Acceptable delivery time is the average number of days per delivery that would be satisfactory to the stakeholder.
- Acceptable logistics cost is the average total transport cost per delivery from production area to consumption area that would be satisfactory to the stakeholder.
- Ask the stakeholder if his/her company is willing or not to use the new RO-RO shipping service given the assumed advantages indicated in the table. Probe reasons for any NO answer.

Q21. Ask the stakeholder what he/she would expect from the new RO-RO shipping service in the particular route in terms of cost, schedule, capacity, legal and institutional concerns, etc. Probe for more detailed explanation if necessary.

Q22. Ask the stakeholder what he/she thinks would be the advantages and/or disadvantages of using the new RO-RO shipping service. Probe for more detailed explanation if necessary.

Q23. Ask the stakeholder for any other additional comment or opinion about the new RO-RO shipping service. Probe for more detailed explanation if necessary.

## B. Survey of Travel and Tour Operators

At the start of the session, the interviewer should indicate in the appropriate box on page 1 his/her name, survey city, sequence number, date and time of the interview. Before proceeding to the Q&A portion of the interview, the interviewer should briefly describe the Gensan-Bitung route with reference to the page on the RORO Shipping Operation Plan and supplemented with the more detailed map.

Q1 to Q8. Same guidelines as in the Survey of Forwarders, Shippers, Consignees.

Q9. The stakeholder can best answer this question if he/she has consulted actual company records before the interview.
- Indicate actual numbers of outbound and inbound tourists, both domestic and international, for 2009-2011. Tourists include all persons traveling to/from the survey cities (i.e., Gensan and Davao) either for leisure or business. **Outbound** tourists are those who originate or start their travel from the survey cities going to other domestic or foreign destinations. Conversely, **inbound** tourists are those traveling to the survey cities from other domestic or foreign destinations.
- For international tourists, indicate their originating and destination countries.
- Ask the stakeholder if he/she has a more detailed breakdown of tourists by nationality, specific destination, etc. which he/she is willing to share to the interviewer. If available, request the stakeholder for a copy of the record or have a photocopy made.

Q10. Indicate the major ports of origin, transit, and final destination for outbound and inbound tourists. This can be a combination of airports, seaports and overland transport terminals. For example, Gensan Airport--Manila Airport---Hongkong Airport, Gensan (Makar) Port--Cebu Port--Cebu Airport--Singapore Airport, Gensan Bus Terminal--Davao Bus Terminal--Davao Airport--Hongkong Airport. This question will probably have multiple answers.

Q11. Indicate in the table the actual 2011 record of INTERNATIONAL outbound and inbound tourists from/to the Philippines as well as projections for 2015. Most tour operators might say that they cannot make projections since their business will depend on the market demand and requirements that would be prevailing by 2015. In such case, the interviewer can ask the stakeholder to base his/her projections on historical trends in their business performance.
- The routes are those usually included in the tour operator's package tours (e.g., Gensan-Manila-Hongkong, Gensan-Cebu-Singapore, etc.). There can be multiple routes.
- The duration of tour packages may be expressed in terms of number of days and nights (e.g., 3D/2N, 4D/3N, etc.).

- Indicate the currency for the average price per person of the tour packages. Average price may vary between peak and off-peak season; if so, indicate the prices for both.
- If the stakeholder cannot give the number of tourists on a monthly basis, this data can be indicated on a per quarter, per semester, or per year basis.
- If the stakeholder cannot give the number of tours on a monthly basis, this data can be indicated on a per quarter, per semester, or per year basis.
- Where possible, ask the stakeholder the peak and off-peak months (e.g., November-January, etc.).
- Trunk service refers to international routes. Feeder service refers to domestic routes. Trunk section is the international transport connection (e.g., Manila-Hongkong, Cebu-Singapore, etc.). Feeder section is the domestic connection to the international route, which may include several transit terminals (e.g., Gensan-Manila, Davao-Cebu, Gensan-Davao-Manila-Clark, etc.).
- Mode of transport may include airplane, passenger ship, fast ferry boat, bus, van, car, train, etc.
- Average Transfer Time from Feeder is the average number of hours waiting time between expected time of arrival (ETA) from the domestic port/terminal to the expected time of departure (ETD) of the international connection. In travel language, it is also called layover time.

Q12. Ask the stakeholder what he/she would expect from the new RO-RO shipping service in the particular route in terms of cost, schedule, capacity, legal and institutional concerns, etc. Probe for more detailed explanation if necessary.

Q13. Ask the stakeholder what he/she thinks would be the advantages and/or disadvantages of using the new RO-RO shipping service. Probe for more detailed explanation if necessary.

Q14. Indicate by checking Yes, No or Maybe if the stakeholder would be able to use the Gensan-Bitung RO-RO shipping service as an international connection for his/her tours to/from Indonesia. Probe for his/her reasons for saying so.

Q15. The proposed Gensan-Bitung shipping service will use a ROPAX ship which can carry both vehicles (e.g., trucks, buses, cars, etc.) and passengers. This question asks the stakeholder's willingness or not (as well as his/her reasons for being so) to use this shipping service to bring across their vehicles (e.g., tour bus, vans, cars) with drivers for use as local transportation in the destination country, IF ALLOWED. If the stakeholder asks, the interviewer can volunteer the information that unlike the Philippines, Indonesia is a right-hand drive country. Also, international agreements on mutual recognition of driver's license, vehicle insurance, and customs duties on temporary imported vehicles are not yet in place so these legal and institutional issues will still need to be addressed if and when the new RO-RO shipping service is implemented.

Q16. If the stakeholder will want to use the Gensan-Bitung RO-RO shipping service (Q14), indicate how much he/she (or his/her clients) would be willing to pay per passenger to use the service. If the stakeholder is willing to bring across his/her vehicles on the RO-RO shipping service (Q15), indicate how much he/she would be willing to pay per vehicle. Specify the currency used.

Q17. Ask the stakeholder for any other additional comment or opinion about the new RO-RO shipping service. Probe for more detailed explanation if necessary.

Annex 2.3a

Questionnaire Forwarder-Shipper

GSC-DVO (English)

# Stakeholder Interview Survey: Forwarders, Shippers and Consignees

This survey aims to gather information on existing and potential trade between the Philippines and Indonesia, particularly using the Davao/General Santos-Manado/Bitung transport corridor, as well as on the possibility of operating a Roll-On/Roll-Off (RO-RO) shipping service between General Santos Port and Bitung Port. The Study is commissioned by the Japan International Cooperation Agency (JICA) and the Association of Southeast Asian Nations (ASEAN). <u>Your answers will be kept in strictest confidentiality (survey results will be presented in aggregates for analysis without inference to or mention of the firms).</u> Thank you for your cooperation.

## I. Basic Information

(1) Company Name ____________________________________________

(2) Name of Respondent

Mr./Ms./Atty./Dr./Engr. First Name______________________ M.I._____ Surname ____________________________

Designation ____________________________________________

(3) Company Address: Check if: Headquarter _____ Branch _________ Satellite_________

____________________________________________

____________________________________________

(4) Other Contact Details:

Tel. No(s) ___________________________________ Fax No(s) ______________________________________

Mobile No(s) _________________________________ Email __________________________________________

## II. Company Operations

(5) Type of Business (Encircle all that apply; Underline MAIN business)

1. Forwarder
2. Trucking
3. Agricultural Producer
4. Fishery Producer
5. Agriculture/Fishery Processor
6. Manufacturer (Non-Agriculture/Fishery)
7. Distributor/Trader/Wholesale Dealer
8. Others, please specify: ______________________________________

(6) For producers/processors, what are your main products?

____________________________________________

____________________________________________

(7) Total Number of Employees __________

(8) Total capitalization in local currency or U.S. Dollar (Please indicate currency) ___________________________________

(9) Total gross sales amount in 2011 in local currency or U.S. Dollar (Please indicate currency) _______________________

*FOR SURVEYOR'S USE ONLY*

*Survey City:* __________________________ *Seq. No.:* ______ *Date:* __________ *Time:* __________

*Name of Interviewer:* ____________________________________________

(10) Total export/import cargo volume and value in 2011 (Please indicate currency)

Export: ____________________________ tons Value __________________________________

Import: ____________________________ tons Value __________________________________

(11) What are the cargoes handled at your company?

________________________________________________________________________________________________

________________________________________________________________________________________________

________________________________________________________________________________________________

(12) Approximately what percentage of your cargoes are containerized, bulk, or breakbulk/loose?

Containerized __________ %

Bulk __________ %

Breakbulk/Loose __________ %

(13) What logistics assets do you own/rent? Please encircle applicable assets and indicate the number owned or rented.

1. Warehouse __________
2. Truck __________
3. Containers __________
4. Container Chassis __________
5. Tractor Head __________
6. Reefer Van __________
7. Others, please specify ______________________________ __________

III. Cargo Transport Services

(14) What port(s) do you use for your regular cargo transport operation and how often do you use these ports?

_____________________________________ __________ times per month

_____________________________________ __________ times per month

_____________________________________ __________ times per month

(15) What are your main reasons for using the above port(s)?

_______________________________________________________________________________________________

_______________________________________________________________________________________________

_______________________________________________________________________________________________

_______________________________________________________________________________________________

(16) Do you have any problems about port services (in Gensan or Davao Port )?

_____ Yes ____ No _____ Not Applicable (Reason: ________________________________________________ )

If yes, please encircle applicable conditions below and check whether they are minor, medium or major problems for your business operations.

| Problems at Port | Gensan Port | | | Davao Port | | |
|---|---|---|---|---|---|---|
| | Minor | Medium | Major | Minor | Medium | Major |
| 1. Port Congestion | | | | | | |
| 2. Damage to Cargo | | | | | | |
| 3. Pilferage of Cargo | | | | | | |
| 4. Slow Customs Clearance | | | | | | |
| 5. Poor Condition of Access Road | | | | | | |
| 6. Congested Access Road | | | | | | |
| 7. High Port Fees and Charges | | | | | | |
| 8. Others, please specify: | | | | | | |
| (a) ______________________ | | | | | | |
| (b) ______________________ | | | | | | |

(17) Are you satisfied with current shipping services at the ports (Gensan or Davao Port) in terms of the following? (Please check)

| Shipping Services at Port | Gensan Port | | Davao Port | |
|---|---|---|---|---|
| | Yes | No | Yes | No |
| 1. Available shipping type | | | | |
| 2. Ship call frequency | | | | |
| 3. Ship cargo capacity | | | | |
| 4. Shipping time | | | | |
| 5. Shipping cost | | | | |
| 6. Service quality (no delay and no damage) | | | | |

Please indicate your specific reasons for the above answers.

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

(18) Do you use air freight service? _____ Yes _____ No

If yes, please provide details below.

| Airport | Cargo Type | Route |
|---|---|---|
| | | |
| | | |
| | | |

(19) Please state your actual records of exports and imports in year 2011 by commodity and region of purchase or delivery. For costs, please indicate currency.

| # | Commodity (Exports) | Average Monthly Tonnage | Type of Packing | Number of Deliveries per Month | | Logistics Chain | | | | | Total Delivery Time | Total Logistics Cost | Ocean Freight Service Cost | Rate of Delayed Delivery | Rate of Damaged Cargo |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | In the Peak Month | In the Off-Peak Month | Production Region (Origin) | Port of Origin | Transshipment Port, if any | Port of Destination | Consumption Region (Destination) | | | | | |
| 1 | | Tons | | | | | | | | | Days | | | % | % |
| 2 | | Tons | | | | | | | | | Days | | | % | % |
| 3 | | Tons | | | | | | | | | Days | | | % | % |
| 4 | | Tons | | | | | | | | | Days | | | % | % |
| 5 | | Tons | | | | | | | | | Days | | | % | % |

| # | Commodity (Imports) | Average Monthly Tonnage | Type of Packing | Number of Deliveries per Month | | Logistics Chain | | | | | Total Delivery Time | Total Logistics Cost | Ocean Freight Service Cost | Rate of Delayed Delivery | Rate of Damaged Cargo |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | In the Peak Month | In the Off-Peak Month | Production Region (Origin) | Port of Origin | Transshipment Port, if any | Port of Destination | Consumption Region (Destination) | | | | | |
| 1 | | Tons | | | | | | | | | Days | | | % | % |
| 2 | | Tons | | | | | | | | | Days | | | % | % |
| 3 | | Tons | | | | | | | | | Days | | | % | % |
| 4 | | Tons | | | | | | | | | Days | | | % | % |
| 5 | | Tons | | | | | | | | | Days | | | % | % |

(20) Please state your plan or forecast for exports and imports in year 2015 by commodity and region of purchase or delivery and your willingness to use the new Gensan-Bitung RO-RO shipping service under the provisional level of service shown in the last sheet. For costs, please indicate currency.

| # | Commodity (Exports) | Average Monthly Tonnage | Type of Packing | Production Region (Origin) | Consumption Region (Destination) | Acceptable Delivery Time | Acceptable Logistics Cost | Will you use the new RO-RO service? (Encircle Yes or No) | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | If overall logistics cost becomes lower | If delivery time becomes shorter | If logistics service becomes better (punctuality and cargo security) | If NO to any of these conditions, please state why. |
| 1 | | Tons | | | | Days | | Yes No | Yes No | Yes No | |
| 2 | | Tons | | | | Days | | Yes No | Yes No | Yes No | |
| 3 | | Tons | | | | Days | | Yes No | Yes No | Yes No | |
| 4 | | Tons | | | | Days | | Yes No | Yes No | Yes No | |
| 5 | | Tons | | | | Days | | Yes No | Yes No | Yes No | |

| # | Commodity (Imports) | Average Monthly Tonnage | Type of Packing | Production Region (Origin) | Consumption Region (Destination) | Acceptable Delivery Time | Acceptable Logistics Cost | Will you use the new RO-RO service? (Encircle Yes or No) | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | If overall logistics cost becomes lower | If delivery time becomes shorter | If logistics service becomes better (punctuality and cargo security) | If NO to any of these conditions, please state why. |
| 1 | | Tons | | | | Days | | Yes No | Yes No | Yes No | |
| 2 | | Tons | | | | Days | | Yes No | Yes No | Yes No | |
| 3 | | Tons | | | | Days | | Yes No | Yes No | Yes No | |
| 4 | | Tons | | | | Days | | Yes No | Yes No | Yes No | |
| 5 | | Tons | | | | Days | | Yes No | Yes No | Yes No | |

(21) Please state your expectations from the new RO-RO service (in terms of shipping cost, schedule, capacity, route, support from industry stakeholders/national and local governments, etc.).

______________________________
______________________________
______________________________
______________________________
______________________________
______________________________

(22) Please state anticipated advantages and/or disadvantages when using the new RO-RO service.

| Advantages | Disadvantages |
|---|---|
| | |
| | |
| | |
| | |

(23) Please state any other comment or opinion regarding the planned RO-RO shipping service.

______________________________
______________________________
______________________________
______________________________
______________________________
______________________________

Annex 2.3b

Questionnaire Travel & Tour Operator

GSC-DVO (English)

# Stakeholder Interview Survey: Travel and Tour Operators

This survey aims to gather information on existing and potential passenger demand between the Philippines and Indonesia, particularly using the Davao/General Santos-Manado/Bitung transport corridor, as well as on the possibility of operating a Roll-On/Roll-Off (RO-RO) shipping service between General Santos Port and Bitung Port. The Study is commissioned by the Japan International Cooperation Agency (JICA) and the Association of Southeast Asian Nations (ASEAN). Your answers will be kept in strictest confidentiality (survey results will be presented in aggregates for analysis without inference to or mention of the firms). Thank you for your cooperation.

## I. Basic Information

(1) Company Name ______________________________

(2) Name of Respondent

Mr./Ms./Atty./Dr./Engr. First Name______________________ M.I._____ Surname ____________________

Designation ______________________________

(3) Company Address: Check if: Headquarter _____ Branch _________ Satellite_________

______________________________

______________________________

(4) Other Contact Details:

Tel. No(s) ______________________ Fax No(s) ______________________

Mobile No(s) ______________________ Email ______________________

## II. Company Operations

(5) Type of Business (Encircle all that apply)

1. Ticketing and hotel reservations
2. Inbound tour packages
3. Outbound tour packages
4. Transport rental services
5. General service agent for airlines
6. Hotel operations
8. Others, please specify: ______________________

(6) Total Number of Employees __________

(7) Total capitalization in local currency and/or U.S. Dollar (Please indicate currency) ____________________

(8) Total gross sales amount in 2011 in local currency and/or U.S. Dollar (Please indicate currency) ____________________

*FOR SURVEYOR'S USE ONLY*

*Survey City:* __________________ *Seq. No.:* ______ *Date:* __________ *Time:* __________

*Name of Interviewer:* ______________________________

(9) Total number of outbound/inbound tourists handled in the last three years (2009-2011), including their origins and destinations.

| | Year | Domestic | International | |
|---|---|---|---|---|
| | | Number | Number | Originating or Destination Countries |
| Outbound | 2009 | | | |
| | 2010 | | | |
| | 2011 | | | |
| Inbound | 2009 | | | |
| | 2010 | | | |
| | 2011 | | | |

[If you have a record of a more detailed breakdown of outbound/inbound tourists by specific nationality, originating country or destination country, please give a copy to the interviewer.]

(10) What are the major origins, transit points and final destinations (by either or a combination of air, sea or land transport) of the tourists you service?

| | Origin | Transit Points | Destination |
|---|---|---|---|
| Outbound | | | |
| Inbound | | | |

(11) Please state actual records in year 2011 and plans/ forecast in year 2015 of your international outbound and inbound tours from/to the Philippines.

| # | Route | Duration | Average Price Per Pax | Average Number of Tourists per Month | | Number of Tours per Month | | Trunk Service (International Routes) | | | Feeder Service (Domestic Routes) | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | Recorded in 2011 | Forecast in 2015 | In the Peak Month | In the Off-Peak Month | Trunk Section | Mode | Average Transfer Time from Feeder | Feeder Section | Mode |
| 1 | | Days | | Pax | Pax | | | | | Hours | | |
| 2 | | Days | | Pax | Pax | | | | | Hours | | |
| 3 | | Days | | Pax | Pax | | | | | Hours | | |
| 4 | | Days | | Pax | Pax | | | | | Hours | | |

| # | Route | Duration | Average Price Per Pax | Average Number of Tourists per Month | | Number of Tours per Month | | Trunk Service (International Routes) | | | Feeder Service (Domestic Routes) | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | Recorded in 2011 | Forecast in 2015 | In the Peak Month | In the Off-Peak Month | Trunk Section | Mode | Average Transfer Time from Feeder | Feeder Section | Mode |
| 5 | | Days | | Pax | Pax | | | | | Hours | | |
| 6 | | Days | | Pax | Pax | | | | | Hours | | |
| 7 | | Days | | Pax | Pax | | | | | Hours | | |
| 8 | | Days | | Pax | Pax | | | | | Hours | | |

## III. Passenger Transport Services

(12) Please state your expectations from the planned RO-RO service between General Santos and Bitung (North Sulawesi, Indonesia) in terms of shipping cost, schedule, capacity, route, support from industry stakeholders/national and local governments, etc.

_______________________________________________

_______________________________________________

_______________________________________________

_______________________________________________

_______________________________________________

_______________________________________________

_______________________________________________

(13) Please state anticipated advantages and/or disadvantages when using the planned RO-RO service.

| Advantages | Disadvantages |
|---|---|
| | |

(14) Will you be able to use the planned RO-RO service as a trunk transport means for your tours to/from neighboring countries? _____ Yes _____ No [proceed to Q17] _____ Maybe

Please cite the reason/s for your answer.

_______________________________________________

_______________________________________________

_______________________________________________

_______________________________________________

(15) If yes to Q14, will you want to bring your vehicles (e.g., tourism bus coaches) with drivers on a RO-RO vessel to use them as local transportation in a neighbor country? _____ Yes _____ No [proceed to Q17] _____ Maybe

Please cite the reason/s for your answer.

_______________________________________________

_______________________________________________

_______________________________________________

_______________________________________________

(16) If yes to Q14 or Q15, how much shipping fare/cost are you willing to pay across the route? (Please specify currency)

Fare per passenger ____________________ Fare per vehicle ____________________

(17) Please state any other comment or opinion regarding the planned RO-RO shipping service.

______________________________________________________________________

______________________________________________________________________

______________________________________________________________________

______________________________________________________________________

______________________________________________________________________

______________________________________________________________________

Annex 2.3c

Questionnaire Forwarder-Shipper

Bitung (Indonesian)

[Bit/Mnd-C]

# Survei Kajian Master Plan dan Kelayakan Pengoperasian Kapal Penyeberangan Feri RO-RO ASEAN

Survei Wawancara Stakeholder Forwarder/EMKL, Pemilik, Pengirim dan Penerima Barang

**Mohon dibaca terlebih dahulu:** Kegiatan survei ini bertujuan untuk mendapatkan gambaran situasi terkini maupun potensi perdagangan dan pergerakan barang yang ada antara Indonesia dan Filipina, khususnya pada koridor Manado/Bitung – Davao/General Santos, terkait dengan rencana pengoperasian kapal penyeberangan feri RO-RO ASEAN yang menghubungkan Pelabuhan Bitung dengan Pelabuhan General Santos.

**Kerahasiaan informasi:** Survei ini diselenggarakan oleh ASEAN bekerjasama dengan JICA. Semua jawaban dan informasi dari Anda dan perusahaan Anda dijamin akan kerahasiannya dan hanya digunakan untuk kepentingan kajian Feri RO-RO ASEAN ini saja. Data-data yang diperoleh akan dianalisa dalam bentuk agregat dan tidak menyebutkan nama Anda maupun perusahaan Anda nantinya. Terima kasih atas kerjasamanya.

Pewawancara : ........................................................................ Tanggal dan jam : .......................................... # ............

## I. Informasi Umum Responden

(1) Nama perusahaan : ........................................................................................................................................

(2) Nama responden : Bp./Ibu ...................................................................... Jabatan : ....................................................

(3) Alamat kantor : ☐ Pusat ☐ Cabang ☐ Perwakilan/satelit

..........................................................................................................................................................................

..........................................................................................................................................................................

(4) No. telepon : ............................................................ No. faximile : ............................................................

No. handphone : ............................................................ E-mail : ............................................................

## II. Operasional Perusahaan

(5,6) Jenis kegiatan usaha (lingkari kegiatan-kegiatan yang sesuai dan garisbawahi kegiatan utama):

1. Forwarder
2. Trucking
3. Penghasil agrikultur, jenis..............................................
4. Penghasil ikan, jenis.....................................................
5. Proses hasil agrikultur/ikan, jenis....................................
6. Manufaktur (selain agrikultur/perikanan)
7. Perdagangan/ distributor/ dealer grosir
8. Lainnya, sebutkan.........................................................

(7) Jumlah karyawan : ............................................

(8) Nilai modal usaha : Rp. ...........................................................

(9) Omzet penjualan tahun 2011 : Rp. ...........................................................

(10) Volum dan nilai ekspor/impor tahun 2011:

a. Ekspor : .........................ton; nilai Rp. ..................................................

b. Impor : .........................ton; nilai Rp. ..................................................

(11) Jenis kargo apa saja yang ditangani oleh perusahaan Anda?

..........................................................................................................................................................................

..........................................................................................................................................................................

..........................................................................................................................................................................

..........................................................................................................................................................................

(12) Terkait tipe pengemasan, kira-kira berapa prosen kargo perusahaan Anda diangkut dengan:

Kontainer .............% Bulk .............% Break bulk/loose ..............%

(13) Aset logistik apa saja yang digunakan (baik milik sendiri atau sewa) oleh perusahaan, dan berapa jumlahnya?

| | Jumlah |
|---|---|
| 1. Gudang | .......... |
| 2. Truk | .......... |
| 3. Kontainer | .......... |
| 4. Chasis kontainer | .......... |
| 5. Tractor head/ kepala truk kontainer | .......... |
| 6. Reefer van/ van berpendingin | .......... |
| 7. Lainnya, sebutkan ...................................................................... | .......... |

## III. Layanan Transportasi Kargo

(14) Pelabuhan mana saja yang Anda gunakan untuk melakukan kegiatan bongkar-muat barang, dan seberapa sering?

........................................................................................................ .......... kali per bulan
........................................................................................................ .......... kali per bulan
........................................................................................................ .......... kali per bulan

(15) Apa alasan utama Anda menggunakan pelabuhan tersebut di atas?

..........................................................................................................................................................................
..........................................................................................................................................................................
..........................................................................................................................................................................

(16) Apakah Anda memiliki kendala/masalah terkait pelayanan Pelabuhan Bitung?

☐ Ya ☐ Tidak ☐ Tidak menggunakan Pelabuhan Bitung, karena ..........................................................................

Jika Anda menjawab "Ya", harap lingkari permasalahan-permasalahan di bawah yang pernah dialami dan menjadi kendala, dan beri tanda silang untuk menggambarkan seberapa krusialnya hal tersebut bagi kegiatan perusahaan Anda.

| Kendala | Tak penting | Cukup penting | Sangat penting |
|---|---|---|---|
| 1. Kongesti | ☐ | ☐ | ☐ |
| 2. Kerusakan kargo | ☐ | ☐ | ☐ |
| 3. Kehilangan kargo | ☐ | ☐ | ☐ |
| 4. Lambatnya pelayanan *custom clearance* | ☐ | ☐ | ☐ |
| 5. Kondisi akses jalan yang kurang memadai, rusak | ☐ | ☐ | ☐ |
| 6. Macetnya akses jalan | ☐ | ☐ | ☐ |
| 7. Tingginya biaya/tarif pelabuhan | ☐ | ☐ | ☐ |
| 8. a. ................................................................ | ☐ | ☐ | ☐ |
| b. ................................................................ | ☐ | ☐ | ☐ |

(17) Apakah Anda merasa cukup puas dengan layanan transportasi laut yang ada di Pelabuhan Bitung saat ini terkait hal berikut, dan apa alasannya?

| Jenis Layanan | Puas | Kurang | Alasan |
|---|---|---|---|
| 1. Ketersediaan jenis kapal | ☐ | ☐ | ........................................................................ |
| 2. Frekuensi kedatangan/keberangkatan | ☐ | ☐ | ........................................................................ |
| 3. Kapasitas kargo kapal | ☐ | ☐ | ........................................................................ |
| 4. Waktu tempuh perjalanan | ☐ | ☐ | ........................................................................ |
| 5. Biaya pengiriman dengan kapal | ☐ | ☐ | ........................................................................ |
| 6. Kualitas (tepat waktu, barang diterima dengan baik) | ☐ | ☐ | ........................................................................ |

(18) Apakah Anda menggunakan jasa transportasi udara? ☐ Ya ☐ Tidak

Jika "Ya", bandara mana yang digunakan, jenis kargo yang diangkut, dan rute mana yang ditempuh?

| Bandara | Jenis Kargo | Rute |
|---|---|---|
| a. ............................................................ | ............................................... | ........................................................... |
| b. ............................................................ | ............................................... | ........................................................... |
| c. ............................................................ | ............................................... | ........................................................... |

(19) Harap lengkapi data aktual ekspor dan/atau impor pada tahun 2011 perusahaan Anda berdasarkan jenis komoditas.

| No. | Komoditas Ekspor | Rerata Volum Bulanan (Ton) | Jenis Pengemasan Container/Bulk/ Break Bulk/Loose/ lainnya | Jumlah Pengiriman per Bulannya | | Rantai Logistik | | | | | Total Waktu Pengi-riman (Hari) | Total Biaya Logistik (Rp.) | Biaya Angkutan Laut (Rp.) | Prosentase Keterlam-batan Waktu Kirim (%) | Prosentase Kargo Rusak (%) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | Bulan Padat | Bulan tak Padat | Daerah Asal Penghasil | Pelabuhan Asal | Pelabuhan Transit jika ada | Pelabuhan Tujuan | Daerah Tujuan Konsumen | | | | | |
| | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | |

| No. | Komoditas Impor | Rerata Volum Bulanan (Ton) | Jenis Pengemasan Container/Bulk/ Break Bulk/Loose/ lainnya | Jumlah Pengiriman per Bulannya | | Rantai Logistik | | | | | Total Waktu Pengi-riman (Hari) | Total Biaya Logistik (Rp.) | Biaya Angkutan Laut (Rp.) | Prosentase Keterlam-batan Waktu Kirim (%) | Prosentase Kargo Rusak (%) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | Bulan Padat | Bulan tak Padat | Daerah Asal Penghasil | Pelabuhan Asal | Pelabuhan Transit jika ada | Pelabuhan Tujuan | Daerah Tujuan Konsumen | | | | | |
| | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | |

(20) Harap lengkapi proyeksi atau target ekspor dan/atau impor pada tahun 2015 berdasarkan jenis komoditas dan kesediaan Anda untuk menggunakan feri RO-RO rute Bitung – General Santos – Davao ini.

| No. | Komoditas Ekspor | Rerata Volum Bulanan (Ton) | Jenis Pengemasan Container/Bulk/ Break Bulk/Loose/ lainnya | Daerah Asal Produksi | Daerah Tujuan Konsumen | Waktu Kirim yang Diharapkan (Hari) | Biaya Logistik yang Diharapkan (Rp.) | Akankah Anda menggunakan layanan feri RO-RO ini? | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | Jika total biaya logistik menjadi kecil | Jika waktu kirim menjadi lebih singkat | Jika kualitas pelayanan logistik lebih baik (tepat waktu dan aman) | Jika "Tidak", harap jelaskan alasannya |
| | | | | | | | | ☐ Ya ☐ Tidak | ☐ Ya ☐ Tidak | ☐ Ya ☐ Tidak | |
| | | | | | | | | ☐ Ya ☐ Tidak | ☐ Ya ☐ Tidak | ☐ Ya ☐ Tidak | |
| | | | | | | | | ☐ Ya ☐ Tidak | ☐ Ya ☐ Tidak | ☐ Ya ☐ Tidak | |
| | | | | | | | | ☐ Ya ☐ Tidak | ☐ Ya ☐ Tidak | ☐ Ya ☐ Tidak | |
| | | | | | | | | ☐ Ya ☐ Tidak | ☐ Ya ☐ Tidak | ☐ Ya ☐ Tidak | |

| No. | Komoditas Impor | Rerata Volum Bulanan (Ton) | Jenis Pengemasan Container/Bulk/ Break Bulk/Loose/ lainnya | Daerah Asal Produksi | Daerah Tujuan Konsumen | Waktu Kirim yang Diharapkan (Hari) | Biaya Logistik yang Diharapkan (Rp.) | Akankah Anda menggunakan layanan feri RO-RO ini? | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | Jika total biaya logistik menjadi kecil | Jika waktu kirim menjadi lebih singkat | Jika kualitas pelayanan logistik lebih baik (tepat waktu dan aman) | Jika "Tidak", harap jelaskan alasannya |
| | | | | | | | | ☐ Ya ☐ Tidak | ☐ Ya ☐ Tidak | ☐ Ya ☐ Tidak | |
| | | | | | | | | ☐ Ya ☐ Tidak | ☐ Ya ☐ Tidak | ☐ Ya ☐ Tidak | |
| | | | | | | | | ☐ Ya ☐ Tidak | ☐ Ya ☐ Tidak | ☐ Ya ☐ Tidak | |
| | | | | | | | | ☐ Ya ☐ Tidak | ☐ Ya ☐ Tidak | ☐ Ya ☐ Tidak | |
| | | | | | | | | ☐ Ya ☐ Tidak | ☐ Ya ☐ Tidak | ☐ Ya ☐ Tidak | |

(21) Uraikan harapan Anda dengan adanya rencana feri RO-RO yang menghubungkan Bitung – General Santos – Davao ini, baik dari aspek biaya, jadwal, kapasitas, rute, dukungan dari pemangku kepentingan baik nasional maupun daerah, dll.

.........................................................................................................................................................................

.........................................................................................................................................................................

.........................................................................................................................................................................

.........................................................................................................................................................................

.........................................................................................................................................................................

(22) Tuliskan kemungkinan-kemungkinan kelebihan dan kekurangan yang akan timbul dari adanya jalur feri RO-RO ini.

| Kelebihan | Kekurangan |
|---|---|
| ................................................................................ | ................................................................................ |
| ................................................................................ | ................................................................................ |
| ................................................................................ | ................................................................................ |
| ................................................................................ | ................................................................................ |

(23) Uraikan pendapat dan komentar Anda lainnya mengenai jalur feri RO-RO yang direncanakan ini.

.........................................................................................................................................................................

.........................................................................................................................................................................

.........................................................................................................................................................................

.........................................................................................................................................................................

.........................................................................................................................................................................

*** Terima kasih atas waktu dan partisipasinya. ***

Annex 2.3d

Questionnaire Travel & Tour Operator

Bitung (Indonesian)

# Survei Kajian Master Plan dan Kelayakan Pengoperasian Kapal Penyeberangan Feri RO-RO ASEAN

[Bit/Mnd-P]

Survei Wawancara Stakeholder Agen Perjalanan Wisata

**Mohon dibaca terlebih dahulu:** Kegiatan survei ini bertujuan untuk mendapatkan gambaran situasi terkini maupun potensi pergerakan wisatawan domestik maupun asing yang ada antara Indonesia dan Filipina, khususnya pada koridor Manado/Bitung – Davao/General Santos, terkait dengan rencana pengoperasian kapal penyeberangan feri RO-RO ASEAN yang menghubungkan Pelabuhan Bitung dengan Pelabuhan General Santos.

**Kerahasiaan informasi:** Survei ini diselenggarakan oleh ASEAN bekerjasama dengan JICA. Semua jawaban dan informasi dari Anda dan perusahaan Anda dijamin akan kerahasiannya dan hanya digunakan untuk kepentingan kajian Feri RO-RO ASEAN ini saja. Data-data yang diperoleh akan dianalisa dalam bentuk agregat dan tidak menyebutkan nama Anda maupun perusahaan Anda. Terima kasih atas kerjasamanya.

Pewawancara : ........................................................................ Tanggal dan jam : ......................................... # ............

## I. Informasi Umum Responden

(1) Nama perusahaan : ..........................................................................................................................................

(2) Nama responden : Bp./Ibu ..................................................................... Jabatan : .....................................................

(3) Alamat kantor : ☐ Pusat ☐ Cabang ☐ Perwakilan/satelit

...............................................................................................................................................................................

...............................................................................................................................................................................

(4) No. telepon : ............................................................ No. faximile : ..........................................................

No. handphone : ............................................................ E-mail : ..........................................................

## II. Operasional Perusahaan

(5) Jenis kegiatan usaha (lingkari kegiatan-kegiatan yang sesuai):

1. Pemesanan tiket dan hotel
2. Paket tur ke Sulut
3. Paket tur ke luar Sulut
4. Rental kendaraan
5. Agen layanan resmi maskapai penerbangan
6. Hotel
8. Lainnya, sebutkan ...........................................................

(6) Jumlah karyawan : ............................................

(7) Nilai modal usaha : Rp. ..............................................................

(8) Omzet penjualan tahun 2011 : Rp. ..............................................................

(9) Jumlah total turis ke/dari Sulut yang ditangani dalam tiga tahun terakhir (2009-2011), beserta informasi asal dan tujuan.

| Dari/Ke Sulut | Tahun | Wisatawan Domestik | Wisatawan Asing | |
|---|---|---|---|---|
| | | Jumlah | Jumlah | Negara Asal |
| Dari Sulut | 2009 | | | |
| | 2010 | | | |
| | 2011 | | | |
| Ke Sulut | 2009 | | | |
| | 2010 | | | |
| | 2011 | | | |

[Jika Anda memiliki daftar lebih lengkap tentang kebangsaan wisatawan, negara/daerah asal dan tujuan, harap diberikan ke pewawancara.]

(10) Didominasi oleh daerah utama mana saja yang menjadi asal, transit dan tujuan wisatawan-wisatawan yang Anda tangani.

| Dari/Ke Sulut | Daerah Asal | Daerah Transit | Daerah Tujuan |
|---|---|---|---|
| Dari Sulut | | | |
| Ke Sulut | | | |

(11) Harap lengkapi data aktual pada tahun 2011 perusahaan Anda dan target di tahun 2015 untuk <u>perjalanan tur luar negeri</u> dari/ke Indonesia.

| No | Rute Keberangkatan ke Luar Negeri | Lama Perjalan Tur (Hari) | Rerata Tarif per orangnya. (Rp. atau USD) | Rerata Jumlah Wisatawan per Bulan | | Jumlah Tur per Bulan | | Jalur Utama (internasional) | | | Jalur Penghubung (domestik) | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | Data 2011 (orang) | Target 2015 (orang) | Bulan Padat | Bulan tak Padat | Asal-Tujuan | Moda | Rerata Waktu yang Dibutuhkan dari Jalur Penghubung (Jam) | Asal-Tujuan | Moda |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |

| No | Rute Kedatangan dari Luar Negeri | Lama Perjalan Tur (Hari) | Rerata Tarif per orangnya. (Rp. atau USD) | Rerata Jumlah Wisatawan per Bulan | | Jumlah Tur per Bulan | | Jalur Utama (internasional) | | | Jalur Penghubung (domestik) | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | Data 2011 (orang) | Target 2015 (orang) | Bulan Padat | Bulan tak Padat | Asal-Tujuan | Moda | Rerata Waktu yang Dibutuhkan dari Jalur Penghubung (Jam) | Asal-Tujuan | Moda |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |

[Jika tabel-tabel di atas tidak cukup, bisa dilanjutkan di tabel yang disediakan di halaman terakhir.]

III. Layanan Transportasi Penumpang

(12) Uraikan harapan Anda dengan adanya rencana feri RO-RO yang menghubungkan Bitung – General Santos – Davao ini, baik dari aspek biaya, jadwal, kapasitas, rute, dukungan dari pemangku kepentingan baik nasional maupun daerah, dll.

.................................................................................................................................................................

.................................................................................................................................................................

.................................................................................................................................................................

.................................................................................................................................................................

.................................................................................................................................................................

(13) Tuliskan kemungkinan-kemungkinan kelebihan dan kekurangan yang akan timbul dari adanya jalur feri RO-RO ini.

| Kelebihan | Kekurangan |
|---|---|
| ............................................................................... | ............................................................................... |
| ............................................................................... | ............................................................................... |
| ............................................................................... | ............................................................................... |
| ............................................................................... | ............................................................................... |

(14) Apakah Anda nantinya dapat memanfaatkan jalur feri RO-RO yang direncanakan ini sebagai alternatif transportasi perjalanan yang menghubungkan Indonesia dengan negara-negara tetangga?

☐ Ya ☐ Tidak [Jika "Tidak" langsung ke pertanyaan (17)] ☐ Mungkin

Harap jelaskan alasan dan pendapatnya.

.................................................................................................................................................................

.................................................................................................................................................................

.................................................................................................................................................................

.................................................................................................................................................................

.................................................................................................................................................................

(15) Jika Anda menjawab "Ya" pada pertanyaan (14) di atas, akankah perusahaan Anda membawa kendaraan (misal bis pariwisata) beserta pengemudinya naik feri RO-RO untuk melintas ke negara tetangga?

☐ Ya ☐ Tidak [Jika "Tidak" langsung ke pertanyaan (17)] ☐ Mungkin

Harap jelaskan alasan dan pendapatnya.

.................................................................................................................................................................

.................................................................................................................................................................

.................................................................................................................................................................

.................................................................................................................................................................

.................................................................................................................................................................

(16) Jika Anda menjawab "Ya" pada pertanyaan (14) dan (15) di atas, berapa tarif feri RO-RO yang sesuai menurut Anda?

- Tarif penumpang: Rp.............................. /penumpang - Tarif kendaraan: Rp.............................. /kendaraan

(17) Uraikan pendapat dan komentar Anda lainnya mengenai jalur feri RO-RO yang direncanakan ini.

.................................................................................................................................................................

.................................................................................................................................................................

.................................................................................................................................................................

.................................................................................................................................................................

.................................................................................................................................................................

*** Terima kasih atas waktu dan partisipasinya. ***

… Tabel isian lanjutan untuk pertanyaan (11)

| No | Rute Keberangkatan ke Luar Negeri | Lama Perjalan Tur (Hari) | Rerata Tarif per orangnya. (Rp. atau USD) | Rerata Jumlah Wisatawan per Bulan | | Jumlah Tur per Bulan | | Jalur Utama (internasional) | | | Jalur Penghubung (domestik) | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | Data 2011 (orang) | Target 2015 (orang) | Bulan Padat | Bulan tak Padat | Asal-Tujuan | Moda | Rerata Waktu yang Dibutuhkan dari Jalur Penghubung (Jam) | Asal-Tujuan | Moda |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |

| No | Rute Kedatangan dari Luar Negeri | Lama Perjalan Tur (Hari) | Rerata Tarif per orangnya. (Rp. atau USD) | Rerata Jumlah Wisatawan per Bulan | | Jumlah Tur per Bulan | | Jalur Utama (internasional) | | | Jalur Penghubung (domestik) | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | Data 2011 (orang) | Target 2015 (orang) | Bulan Padat | Bulan tak Padat | Asal-Tujuan | Moda | Rerata Waktu yang Dibutuhkan dari Jalur Penghubung (Jam) | Asal-Tujuan | Moda |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |

Annex 2.4

Survey Brief

**BRIEFER ON THE STAKEHOLDER INTERVIEW AND**
**PORT TRAFFIC SURVEYS**
**OF THE JICA/ ASEAN MASTER PLAN AND FEASIBILITY STUDY**
**ON A ROLL-ON/ ROLL-OFF (RO-RO) SHIPPING NETWORK AND SHORT SEA SHIPPING**

## Background and Rationale

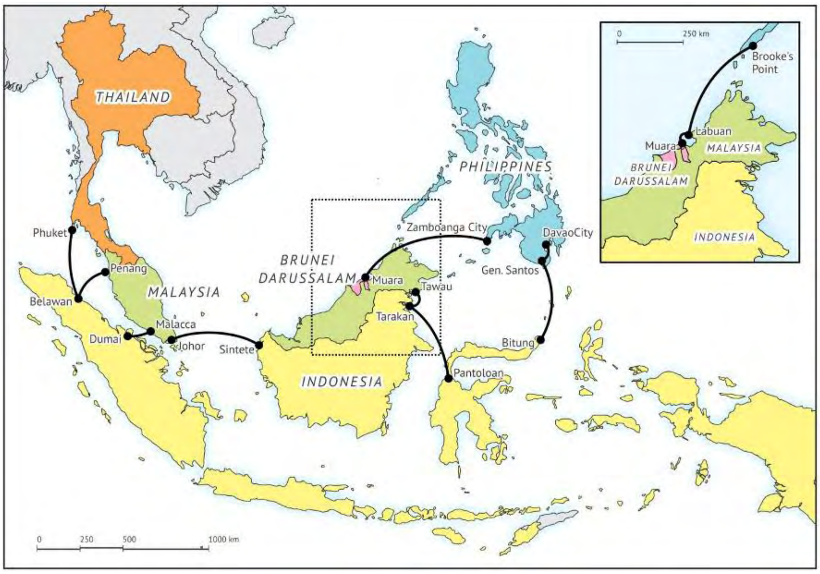
The vision of ASEAN Leaders to build an ASEAN Community by 2015 calls for a well-connected ASEAN that will contribute towards a more competitive and resilient ASEAN. As a key step towards realizing the ASEAN Community of continued economic growth, reduced development gap and improved connectivity among Member States and between Member States and the rest of the world by enhancing regional and national physical, institutional and people-to-people linkages, ASEAN has worked out the Master Plan on ASEAN Connectivity (MPAC) in October 2010.

The ASEAN Connectivity Coordinating Committee (ACCC) was established in April 2011 for coordinating and monitoring the progress of the MPAC. The Japan Task Force to support ASEAN connectivity, consisting of relevant ministries, JICA, Keidanren (Japan Business Federation) and Japan Chamber of Commerce and Industry (JCCI), held joint committee meetings with the ACCC in July and November 2011.

As a result of the said committee meetings, JICA agreed to fund the ASEAN RO-RO Study (hereinafter referred to as the “Study”). The Study is going to concretize the ASEAN RO-RO shipping network development project, which is one of the priority projects listed in the MPAC. It is also planned in the ASEAN Strategic Transport Plan 2011-2015 or the so-called ‘Brunei Action Plan’ that a study would need to be conducted to develop an ASEAN RO-RO Network by 2012.

ASEAN adopts a working group method to coordinate transport cooperation initiatives. The ASEAN RO-RO project will be coordinated and elaborated in the Maritime Transport Working Group (MTWG) meetings held twice a year. It is noted that Indonesia and the Philippines are coordinating countries for the project. The study objectives are threefold:

(1) To collect and analyze a series of regional sea and land transport data/ information in ASEAN, Europe and other regions to realize expansion/ opening of RO-RO routes with efficient and reliable services;
(2) To select priority routes (or shortlist in the project) among the 8 routes to be studied (see Figure 1 on the right) and identify development issues and necessary policy recommendations by route; and



(3) To recommend necessary policy initiatives to ensure RO-RO shipping services among ASEAN Member States after surveying legal and institutional frameworks in relation with international sea and land transports.

**Study Progress**

After the study commenced in January 2012 (due for completion in March 2013), the JICA study team has prepared the Interim Report which presented the results of the first field surveys of the 8 candidate routes identified by the MTWG. Of these, 4 routes (including 2 which have been merged into one triangle route) have been shortlisted for more detailed feasibility study (see the red dotted routes in Figure 2 on the left). The pilot routes include Dumai-Malacca, Belawan-Penang-Phuket, and General Santos-Bitung. During the recently concluded First Regional Workshop on the ASEAN RO-RO Project in Manila on 24-25 July 2012, the highlights of the Interim Report were presented and the workshop confirmed the selection of the above pilot routes for further study.


The JICA study team is currently preparing for the second field surveys, focusing on the pilot routes, between August and October 2012. These will include stakeholder interview surveys and port traffic surveys. The stakeholder surveys aim to gather information on the current and future levels and characteristics of trading and tourism activities as well as the stakeholders' perceptions about the new RO-RO services being planned in these routes. The port traffic surveys aim to collect data on the levels, types and characteristics of actual foreign trade movements across the pilot routes.

**A. Stakeholder Interview Survey**

The stakeholder surveys will cover a target sample of 40-50 shippers, forwarders, consignees, etc. who are doing foreign trade as well as travel and tour agents dealing with international inbound and outbound tour activities in each of the following influence areas of the pilot routes:

(1) Dumai (Indonesia);
(2) Malacca (Malaysia);
(3) Medan/ Belawan (Indonesia);
(4) Penang (Malaysia);
(5) Phuket (Thailand);
(6) Davao/ General Santos (Philippines); and
(7) Manado/ Bitung (Indonesia).

Generally, these stakeholders should either have existing operations in the pilot routes, are planning to operate in the routes, and/or whose operations can be diverted to/ accommodated in the routes through RO-RO shipping services. Aside from the port cities, the target stakeholders may also come from the influence areas or transport corridors outside the port cities (e.g., surrounding cities, provinces, regions) as long as they use or will use the specific ports included in the pilot routes. Survey teams will be fielded in the areas to conduct one-on-one interviews with target stakeholders, guided by a prepared interview questionnaire.

The lists of target interviewees will be prepared in coordination with local partner organizations in the survey areas. These partner organizations are expected to assist the survey teams in (i) identifying target stakeholders for the interviews; (ii) linking the survey teams to the target stakeholders so that the necessary appointments and arrangements for the interviews can be made; (iii) allowing the use of a small space in their offices from where the survey managers and their assistants can coordinate and monitor the survey activities; and (iv) guiding and advising the survey teams on how best to capture the local stakeholders' sentiments about future plans for introducing RO-RO shipping services on the routes.

### B. Port Traffic Survey

The port traffic surveys will be conducted at Dumai, Belawan and Tahuna/Sangihe areas. They aim to capture actual foreign trade movements by commodity type between three origin-destination (O-D) pairs as follows:

(1) Dumai (Indonesia) – Malacca (Malaysia): where a major target is non-conventional vessels trade;

(2) Belawan (Indonesia) – Penang (Malaysia): where a major target is container trade; and

(3) Bitung (Indonesia) – Davao/General Santos (Philippines): where a major target is barter trade via Tahuna, Sangihe Island.

Basically foreign trade can be captured with port traffic data collected by the local customs office, but the customs office does not cover all the vessels calling at the port, especially small wooden-hulled non-convention vessels. Therefore, the Study Team set the following survey objectives:

(a) To get O-D records on tonnage basis by ship and commodity officially collected by the local customs office.
As an alternative, to get total import and export traffic volumes by commodity officially collected by port administrator/operator and O-D records of local shipping companies to break down the total volume into O-D traffic; and

(b) To get O-D records on tonnage basis by ship and commodity by performing direct interviews of shipping companies, ship captains and shipping agents.

In addition, port ocular surveys will be conducted by port development expert(s), who will visit every port again to see the current conditions of the ports and channels during survey activities.

The survey teams will systematically organize and process the information gathered from the stakeholder interview and port traffic surveys and will turn this over to the JICA study team for analysis. Such information, together with data from the port traffic surveys, ocular surveys, interviews and consultations will be analyzed as part of the feasibility study on the pilot routes.

Survey preparations will be conducted several days/weeks in advance before the actual survey/interview activities. Following is the tentative survey schedule:

| Location | Stakeholder Interview | | Port Traffic Survey | |
|---|---|---|---|---|
| | Preparation | Interviews | Preparation | Survey |
| Davao/ General Santos (Philippines) | 30 Jul – 3 Aug | 6 – 24 Aug | - | - |
| Manado/ Bitung (Indonesia) | 6 – 10 Aug | 27 Aug – 7 Sep | - | - |
| Tahuna (Indonesia) | - | - | 6 – 10 Aug | 27 Aug – 5 Sep |
| Penang (Malaysia) | 3 – 7 Sep | 10 – 22 Sep | - | - |
| Medan/ Belawan (Indonesia) | 10 – 14 Sep | 17 – 28 Sep | 10 – 14 Sep | 17 – 26 Sep |
| Phuket (Thailand) | - | 17 – 21 Sep | - | - |
| Dumai (Indonesia) | - | 24 – 28 Sep | 24 – 28 Sep | 1 – 10 Oct |
| Malacca (Malaysia) | - | 1 – 5 Oct | - | - |

# Annex 2.5

# RO-RO Operation Plan

# RO-RO Shipping Operation Plan

for feasibility study purpose only

| | |
|---|---|
| SHIPPING ROUTE:<br>Makar Port, General Santos – Bitung Port<br>(278 NAUTICAL MILES) |  |
| SAILING HOURS: | 20 Hours per Direction |
| SERVICE FREQUENCY: | 2 Round Trips per Week |
| SHIPPING SERVICES: | ◆ Passenger Service<br>◆ Passenger Vehicles (Car, Bus)<br>◆ Cargo Truck<br>◆ 20-foot Container on Chassis |

SHIP TYPE: MIDDLE RO-RO VESSEL

**JICA/ASEAN STUDY ON THE MASTER PLAN AND FEASIBILITY STUDY ON THE ESTABLISHMENT OF AN ASEAN ROLL-ON/ROLL-OFF SHIPPING NETWORK AND SHORT SEA SHIPPING**

# RO-RO SHIPPING OPERATION PLAN

for feasibility study purpose only

| | |
|---|---|
| SHIPPING ROUTE: | Dumai – Malacca |

ASDP Dumai Terminal
and
(Malacca Port - TBD)


| | |
|---|---|
| SAILING HOURS: | 4 hours per direction |
| SERVICE FREQUENCY: | 2 round trips per day |
| SHIPPING SERVICES: | ◆ Passenger Service<br>◆ Passenger Vehicles (Car, Bus)<br>◆ Cargo Truck<br>◆ 20-foot Container on Chassis |
| SHIP TYPE: | ROPAX Vessel (500 GT) |

*Image*

**JICA/ASEAN STUDY ON THE MASTER PLAN AND FEASIBILITY STUDY ON THE ESTABLISHMENT OF AN ASEAN ROLL-ON/ROLL-OFF SHIPPING NETWORK AND SHORT SEA SHIPPING**

# RO-RO SHIPPING OPERATION PLAN

for feasibility study purpose only

| | |
|---|---|
| SHIPPING ROUTE:<br>Belawan Port, Indonesia – Penang Port, Malaysia – Phuket Port, Thailand | <br> |
| SAILING HOURS: | Belawan – Penang: 7 hours<br>Penang – Phuket: 10 hours<br>Phuket – Belawan: 12 Hours |
| SERVICE FREQUENCY: | 3 ROUND TRIPS PER WEEK |
| SHIPPING SERVICES: | ◆ Passenger Service<br>◆ Passenger Vehicles (Car, Bus)<br>◆ Cargo Truck<br>◆ 20-foot Container on Chassis |
| SHIP TYPE: ROPAX VESSEL | <br> |

**JICA/ASEAN STUDY ON THE MASTER PLAN AND FEASIBILITY STUDY ON THE ESTABLISHMENT OF AN ASEAN ROLL-ON/ROLL-OFF SHIPPING NETWORK AND SHORT SEA SHIPPING**

Annex 2.6

Partner Support Letters

DEPARTMENT OF TRADE AND INDUSTRY
PHILIPPINES

August 22, 2012

Ms. Herminia Narciso
Plant Manager
Alliance Tuna International Corp.
Banwalan, Tambler
General Santos City

Dear Ms. Narciso:

Greetings!

The Department of Trade and Industry (DTI) is supporting the implementation of the Stakeholder Interview Survey of the JICA/ASEAN project on "The Master Plan and Feasibility Study on the Establishment of an ASEAN Roll-On/ Roll-Off (RO-RO) Shipping Network and Short Sea Shipping." The survey requires one-on-one interviews with selected stakeholders in the influence areas of selected pilot routes, including the General Santos-Bitung route. The results of the study will contribute to our overall efforts to expand Mindanao's international maritime connectivity and promote trade and economic development.

In this regard, we would appreciate it if your company can participate in the survey and your designated representative can meet with the survey interviewer at a convenient time to be arranged soon. Please find attached the letter from the JICA Study Team and other materials for your reference.

Thank you very much for your continuing support. Best regards.

Very truly yours,

IBRAHIM K. GUIAMADEL
Regional Director
Department of Trade and Industry XII

CERTIFICATION INTERNATIONAL
ISO 9001:2008
Cert No. CIP/3817/08/11/604

REGIONAL OFFICE NO. 12
4th & 3rd Floor De Luz Building, General Santos Drive Corner Aquino Street, 9506 Koronadal City, Philippines
Phone: +63(83)228-9837 Fax: +63(83)520-0613 E-mail: ro@dti12.org Visit: www.superconsumer.net

PEMERINTAH PROVINSI SULAWESI UTARA
**BADAN PERENCANAAN PEMBANGUNAN DAERAH**
JL. 17 AGUSTUS NO.74, TELP. (0431) 851380, FAX. (0431) 863204, PO-BOX 147
MANADO 95117

Manado, 3 September 2012

Nomor : 050/Bappeda-IV/468
Lamp. : 1 (Satu) Berkas
Perihal : Survei Wawancara Stakeholder Kajian Master Plan dan Kelayakan Pengoperasian Kapal Penyeberangan Feri RO-RO Asean, di Wilayah Manado-Bitung

**KEPADA**
**Yth : Pelaku Kegiatan Forwarding, Trading dan Travel Agent**
**Di**
**Tempat**

Bersama ini disampaikan bahwa saat ini sedang dilakukan kegiatan studi *The Master Plan and Feasibility Study on the Establishment of an ASEAN RO-RO Shipping Network and Short Sea Shipping* atau Kajian Master Plan dan Kelayakan Pengoperasian Kapal Penyeberangan Feri RO-RO ASEAN yang dilaksanakan oleh Association of Southeast Asian Nations (ASEAN) dan Japan International Cooperation Agency (JICA).

Kegiatan survey yang merupakan bagian dari studi, bertujuan untuk mendapatkan gambaran situasi terkini maupun potensi pergerakan barang dan penumpang yang ada antara Indonesia dan Filipina, khususnya pada koridor Manado/Bitung – Davao/General Santos, terkait dengan kandidat rencana pengoperasian kapal penyeberangan Feri RO-RO ASEAN yang menghubungkan Pelabuhan Bitung dengan Pelabuhan General Santos yang sedang dikaji oleh ASEAN dan JICA

Survei Wawancara yang dilakukan oleh pihak konsultan ASEAN-JICA ini, dilakukan pada tanggal 3 s/d 14 September 2012, kepada para pelaku kegiatan forwarding, trading dan travel agent di wilayah Manado dan Bitung.

Demikian disampaikan, atas perhatiannya diucapkan terima kasih

**An. KEPALA BADAN PERENCANAAN PEMBANGUNAN DAERAH**
**PROVINSI SULAWESI UTARA**
***SEKRETARIS***

**Ir. Ria Dunggio, MSi**
**PEMBINA TKT. I**
**NIP. 19620704 198903 2 003**

UNIT PERANCANG EKONOMI
*Economic Planning Unit*
JABATAN PERDANA MENTERI
*Prime Minister's Department*
BLOK B5 & B6
PUSAT PENTADBIRAN KERAJAAN PERSEKUTUAN
62502 PUTRAJAYA
MALAYSIA

EPU
ECONOMIC PLANNING UNIT
PRIME MINISTER'S DEPARTMENT, MALAYSIA

*Telefon : 603-8872 3333*

*Ruj. Tuan:*
*Your Ref.:*

*Ruj. Kami:* (21)UPE (S)11/131/
*Our Ref.:* 62/Jld. 60

*Tarikh:* 4 September 2012
*Date:*

**To Whom It May Concern**

**THE MASTER PLAN AND FEASIBILITY STUDY ON THE ESTABLISHMENT OF AN ASEAN ROLL-ON/ ROLL-OFF (RO-RO) SHIPPING NETWORK AND SHORT SEA SHIPPING**

Greetings!

The Economic Planning Unit of the Prime Minister Department of Malaysia is supporting the implementation of the Stakeholder Interview Survey of the JICA/ASEAN project on **"The Master Plan and Feasibility Study on the Establishment of an ASEAN Roll-On/ Roll-Off (RO-RO) Shipping Network and Short Sea Shipping."**

The survey requires one-on-one interviews with selected stakeholders in the influence areas of selected pilot routes, including the Penang-Belawan and Penang – Phuket routes.

The results of the study will contribute to our overall efforts to expand Penang's international maritime connectivity and promote trade and tourism development.

In this regard, we would appreciate it if your company can participate in the survey and your designated representative can meet with the survey interviewer, **Mr. Lim Wei Seong**, at a convenient time to be arranged soon.

Thank you very much for your continuing support.

Yours Sincerely,

**(RAZALI BIN CHE MAT)**
For Director General
Economic Planning Unit
Prime Minister's Department
Putrajaya, Malaysia

Annex 2.7

JICA Survey Letter - GSC

**Project Office:**
ALMEC Corporation
Graha Mandiri 17th Floor, Jl. Imam Bonjol 61,
Jakarta 10310, Indonesia
Phone: +62 21 3983 4101
Fax: +62 21 3983 4102

22 August 2012

**Ms. Herminia Narciso**
Plant Manager
Alliance Tuna International Corp.
Banwalan, Tambler
General Santos City
Email: hbnarciso@allianceselectfoods.com

Dear Ms. Narciso,

We are currently implementing "The Master Plan and Feasibility Study on the Establishment of an ASEAN Roll-On/Roll-Off (RO-RO) Shipping Network and Short Sea Shipping" project under the auspices of the Japan International Cooperation Agency (JICA) and the ASEAN Secretariat. The study aims to assess the feasibility of establishing international RO-RO connections between 8 candidate routes covering 17 ports in Brunei Darussalam, Indonesia, Malaysia, Philippines and Thailand.

Of the candidate routes, 3 pilot routes have been shortlisted for more detailed feasibility study, namely Dumai (Indonesia)-Malacca (Malaysia), Belawan (Indonesia)-Penang (Malaysia)-Phuket (Thailand), and General Santos (Philippines)-Bitung (Indonesia). These pilot routes are now subject to further data gathering and assessment through field surveys. In particular, the stakeholder surveys will cover a sample of shippers, forwarders, consignees, etc. in the transport corridors of the pilot routes who are doing foreign trade as well as travel and tour operators dealing with international inbound and outbound tour activities to know the current and potential trading and tourism levels across the routes as well as stakeholders' perceptions about the new RO-RO services being planned in these routes. We are currently conducting the survey for the Davao/General Santos transport corridor with the assistance of the Department of Trade and Industry (DTI).

In this connection, we would like to **request you, as one of our identified stakeholders in the SOCCSKSARGEN region, to participate in the survey** by granting our surveyors an interview with your duly designated representative. The interview will be based on a prepared questionnaire, a copy of which is attached. Rest assured that any information gathered from the survey will be kept confidential and will only be used for this study. Our survey team will contact you soon to set an appointment for the interview.

We look forward to your kind consideration of this request. Thank you in advance for your kind cooperation.

Yours sincerely,

熊澤 憲

**KUMAZAWA KEN**
Team Leader
JICA Study Team

cc:
Ms. Cheeryl Andresio, JICA Survey Manager (csecuya@gmail.com)
Mr. Robert Sison, Survey Assistant (robsison@yahoo.com)
Mr. Joel Flores, DTI-12 Staff (leonard.flores@dti12.org)

# Annex 2.8

# Survey Encoding Template

# Encoding Reference for FORWARDER/SHIPPER Survey

| | ASEAN RORO SHIPPER Survey Items | Record Type | Respondent 1 | Respondent 2 | Respondent 3 | Respondent 4 | Respondent 5 | Respondent … | Respondent n |
|---|---|---|---|---|---|---|---|---|---|
| **Section I** | **Basic Information** | | | | | | | | |
| **Q1** | **Company Name** | **Alpha** | | | | | | | |
| **Q2** | **Respondent** | | | | | | | | |
| Q2a | Name of Respondent | Alpha | | | | | | | |
| Q2b | Designation | Alpha | | | | | | | |
| **Q3** | **Company** | | | | | | | | |
| Q3a | Company Address | Memo | | | | | | | |
| Q3b | Office Classification (HQ-Branch-Satellite) | HQ; Branch; Satellite | | | | | | | |
| **Q4** | **Contact Details** | | | | | | | | |
| Q4a | Tel. No. | numeric | | | | | | | |
| Q4b | Mobile No. | numeric | | | | | | | |
| Q4c | Fax No. | numeric | | | | | | | |
| Q4d | Email | memo | | | | | | | |
| **Section II** | **Company Operations** | | | | | | | | |
| **Q5** | **Type of Business** | | | | | | | | |
| Q5a | Main Business | memo | | | | | | | |
| Q5-1 | Forwarder | 1 = encircled | | | | | | | |
| Q5-2 | Trucking | 1=encircled | | | | | | | |
| Q5-3 | Agricultural Producer | 1=encircled | | | | | | | |
| Q5-4 | Fishery Producer | 1=encircled | | | | | | | |
| Q5-5 | Agriculture/Fishery Processor | 1=encircled | | | | | | | |
| Q5-6 | Manufacturer (Non-Agriculture / Fishery) | 1=encircled | | | | | | | |
| Q5-7 | Distributor / Trader / Wholesale Dealer | 1=encircled | | | | | | | |
| Q5-8 | Others; specified | memo | | | | | | | |
| **Q6** | **Main Products of Producers/Processors** | **memo** | | | | | | | |
| **Q7** | **Total Number of Employees** | **numeric** | | | | | | | |
| **Q8** | **Total Capitalization (currency indicated Php or USD)** | **memo with currency indicated** | | | | | | | |
| **Q9** | **Total Gross Sales for 2011 (currency indicated Php or USD)** | **memo with currency indicated** | | | | | | | |
| **Q10** | **2011 Export/Import Volume & Value** | | | | | | | | |
| Q10a | Export in Tons | numeric | | | | | | | |
| Q10b | Export Value (currency indicated Php or USD) | memo with currency indicated | | | | | | | |
| Q10c | Import in Tons | numeric | | | | | | | |
| Q10d | Import Value (currency indicated Php or USD) | memo with currency indicated | | | | | | | |
| **Q11** | **Cargoes Handled** | **memo** | | | | | | | |
| **Q12** | **Percentage of cargo types** | | | | | | | | |
| Q12a | Containerized (%) | numeric | | | | | | | |
| Q12b | Bulk (%) | numeric | | | | | | | |
| Q12c | Breakbulk/loose (%) | numeric | | | | | | | |
| **Q13** | **Logistic Assets (owned and rented)** | | | | | | | | |
| Q13-1 | Warehouse | numeric | | | | | | | |
| Q13-2 | Truck | numeric | | | | | | | |
| Q13-3 | Containers | numeric | | | | | | | |
| Q13-4 | Container Chassis | numeric | | | | | | | |
| Q13-5 | Tractor Head | numeric | | | | | | | |
| Q13-6 | Reefer Van | numeric | | | | | | | |
| Q13-7 | Others; specified | memo | | | | | | | |

| | ASEAN RORO SHIPPER Survey Items | Record Type | Respondent 1 | Respondent 2 | Respondent 3 | Respondent 4 | Respondent 5 | Respondent … | Respondent n |
|---|---|---|---|---|---|---|---|---|---|
| **Section III** | **Cargo Transport Services** | | | | | | | | |
| **Q14** | **Port Usage (Mindanao Only)** | | | | | | | | |
| Q14a | Name of Port (1) | alpha | | | | | | | |
| Q14b | times per month | numeric | | | | | | | |
| Q14c | Name of Port (2) | alpha | | | | | | | |
| Q14d | time per month | numeric | | | | | | | |
| Q14e | Name of Port (3) | alpha | | | | | | | |
| Q14f | times per month | numeric | | | | | | | |
| **Q15** | **Reasons for using these ports** | **memo** | | | | | | | |
| **Q16** | **Any Problems in Port Service** | | | | | | | | |
| Q16a | Yes or No | alpha | | | | | | | |
| Q16a_NA | Reason for Not Applicable | memo | | | | | | | |
| **Q16b** | **Problems at Gensan Port** | | | | | | | | |
| Q16b-1 | Port Congestion | 1=minor; 2=medium; 3=major | | | | | | | |
| Q16b-2 | Damage to Cargo | 1=minor; 2=medium; 3=major | | | | | | | |
| Q16b-3 | Pilferage of Cargo | 1=minor; 2=medium; 3=major | | | | | | | |
| Q16b-4 | Slow Customs Clearance | 1=minor; 2=medium; 3=major | | | | | | | |
| Q16b-5 | Poor Condition of Access Road | 1=minor; 2=medium; 3=major | | | | | | | |
| Q16b-6 | Congested Access Road | 1=minor; 2=medium; 3=major | | | | | | | |
| Q16b-7 | High Port Fees and Charges | 1=minor; 2=medium; 3=major | | | | | | | |
| Q16b-Oth_1 | Others; specified (a) | memo | | | | | | | |
| Q16b-Oth(a) | problem rank | 1=minor; 2=medium; 3=major | | | | | | | |
| Q16b-Oth_2 | Others; specified (b) | memo | | | | | | | |
| Q16b-Oth(b) | problem rank | 1=minor; 2=medium; 3=major | | | | | | | |
| **Q16c** | **Problems at Davao Port** | | | | | | | | |
| Q16c-1 | Port Congestion | 1=minor; 2=medium; 3=major | | | | | | | |
| Q16c-2 | Damage to Cargo | 1=minor; 2=medium; 3=major | | | | | | | |
| Q16c-3 | Pilferage of Cargo | 1=minor; 2=medium; 3=major | | | | | | | |
| Q16c-4 | Slow Customs Clearance | 1=minor; 2=medium; 3=major | | | | | | | |
| Q16c-5 | Poor Condition of Access Road | 1=minor; 2=medium; 3=major | | | | | | | |
| Q16c-6 | Congested Access Road | 1=minor; 2=medium; 3=major | | | | | | | |
| Q16c-7 | High Port Fees and Charges | 1=minor; 2=medium; 3=major | | | | | | | |
| Q16c-Oth_1 | Others; specified (a) | memo | | | | | | | |
| Q16c-Oth(a) | problem rank | 1=minor; 2=medium; 3=major | | | | | | | |
| Q16c-Oth_2 | Others; specified (b) | memo | | | | | | | |
| Q16c-Oth(b) | problem rank | 1=minor; 2=medium; 3=major | | | | | | | |
| **Q17** | **Satisfied with Shipping Services** | | | | | | | | |
| **Q17a** | **Satisfaction w/ Shipping at Gensan Port** | | | | | | | | |
| Q17a-1 | Available Shipping Type | 1=yes ; 2=no | | | | | | | |
| Q17a-2 | Ship Call Frequency | 1=yes ; 2=no | | | | | | | |
| Q17a-3 | Ship Cargo Capacity | 1=yes ; 2=no | | | | | | | |
| Q17a-4 | Shipping Time | 1=yes ; 2=no | | | | | | | |
| Q17a-5 | Shipping Cost | 1=yes ; 2=no | | | | | | | |
| Q17a-6 | Service Quality (no delay and no damage) | 1=yes ; 2=no | | | | | | | |
| **Q17b** | **Satisfaction wi/Shipping at Davao Port** | | | | | | | | |
| Q17b-1 | Available Shipping Type | 1=yes ; 2=no | | | | | | | |
| Q17b-2 | Ship Call Frequency | 1=yes ; 2=no | | | | | | | |
| Q17b-3 | Ship Cargo Capacity | 1=yes ; 2=no | | | | | | | |

| | ASEAN RORO SHIPPER Survey Items | Record Type | Respondent 1 | Respondent 2 | Respondent 3 | Respondent 4 | Respondent 5 | Respondent … | Respondent n |
|---|---|---|---|---|---|---|---|---|---|
| Q17b-4 | Shipping Time | 1=yes ; 2=no | | | | | | | |
| Q17b-5 | Shipping Cost | 1=yes ; 2=no | | | | | | | |
| Q17b-6 | Service Quality (no delay and no damage) | 1=yes ; 2=no | | | | | | | |
| Q17c | Reasons for Satisfaction | memo | | | | | | | |
| **Q18** | **If Using Air Freight Service** | | | | | | | | |
| Q18a-1 | Airport 1 | alpha | | | | | | | |
| Q18a-2 | Cargo Type 1 | memo | | | | | | | |
| Q18a-3 | Route 1 | memo | | | | | | | |
| Q18b-1 | Airport 2 | alpha | | | | | | | |
| Q18b-2 | Cargo Type 2 | memo | | | | | | | |
| Q18b-3 | Route 2 | memo | | | | | | | |
| Q18c-1 | Airport 3 | alpha | | | | | | | |
| Q18c-2 | Cargo Type 3 | memo | | | | | | | |
| Q18c-3 | Route 3 | memo | | | | | | | |
| **Q19** | **2011 Export and Imports by Commodity and O-D** | | | | | | | | |
| **Q19a** | **Exports (Actual)** | | | | | | | | |
| Q19a-1 | Commodity No. 1 | alpha | | | | | | | |
| Q19a-1(a) | Ave, Monthly Tonnage (in tons) | numeric - tons | | | | | | | |
| Q19a-1(b) | Type of Packing | alpha | | | | | | | |
| Q19a-1(c ) | No. of Deliveries / Month (Peak Month) | numeric | | | | | | | |
| Q19a-1(d) | No. of Deliveries / Month (Off-peak Month) | numeric | | | | | | | |
| Q19a-1(e) | Logistics - Production Region (Origin) | alpha | | | | | | | |
| Q19a-1(f) | Logistics - Port of Origin | alpha | | | | | | | |
| Q19a-1(g) | Logistics - Transhipment Port | alpha | | | | | | | |
| Q19a-1(h) | Logistics - Port of Destination | alpha | | | | | | | |
| Q19a-1(i) | Logisitics - Consumption Region (Destination) | alpha | | | | | | | |
| Q19a-1(j) | Total Delivery Time | numberic - no. of days | | | | | | | |
| Q19a-1(k) | Total Logistics Cost | memo with currency indicated | | | | | | | |
| Q19a-1(l) | Ocean Freight Service Cost | memo with currency indicated | | | | | | | |
| Q19a-1(m) | Rate of Delayed Delivery | numeric - percent | | | | | | | |
| Q19a-1(n) | Rate of Damaged Cargo | numeric - percent | | | | | | | |
| Q19a-2 | Commodity No. 2 | alpha | | | | | | | |
| Q19a-2(a) | Ave, Monthly Tonnage (in tons) | numeric - tons | | | | | | | |
| Q19a-2(b) | Type of Packing | alpha | | | | | | | |
| Q19a-2(c ) | No. of Deliveries / Month (Peak Month) | numeric | | | | | | | |
| Q19a-2(d) | No. of Deliveries / Month (Off-peak Month) | numeric | | | | | | | |
| Q19a-2(e) | Logistics - Production Region (Origin) | alpha | | | | | | | |
| Q19a-2(f) | Logistics - Port of Origin | alpha | | | | | | | |
| Q19a-2(g) | Logistics - Transhipment Port | alpha | | | | | | | |
| Q19a-2(h) | Logistics - Port of Destination | alpha | | | | | | | |
| Q19a-2(i) | Logisitics - Consumption Regoin (Destination) | alpha | | | | | | | |
| Q19a-2(j) | Total Delivery Time | numberic - no. of days | | | | | | | |
| Q19a-2(k) | Total Logistics Cost | memo with currency indicated | | | | | | | |
| Q19a-2(l) | Ocean Freight Service Cost | memo with currency indicated | | | | | | | |
| Q19a-2(m) | Rate of Delayed Delivery | numeric - percent | | | | | | | |
| Q19a-2(n) | Rate of Damaged Cargo | numeric - percent | | | | | | | |
| Q19a-3 | Commodity No. 3 | alpha | | | | | | | |
| Q19a-3(a) | Ave, Monthly Tonnage (in tons) | numeric - tons | | | | | | | |

| | ASEAN RORO SHIPPER Survey Items | Record Type | Respondent 1 | Respondent 2 | Respondent 3 | Respondent 4 | Respondent 5 | Respondent … | Respondent n |
|---|---|---|---|---|---|---|---|---|---|
| Q19a-3(b) | Type of Packing | alpha | | | | | | | |
| Q19a-3(c ) | No. of Deliveries / Month (Peak Month) | numeric | | | | | | | |
| Q19a-3(d) | No. of Deliveries / Month (Off-peak Month) | numeric | | | | | | | |
| Q19a-3(e) | Logistics - Production Region (Origin) | alpha | | | | | | | |
| Q19a-3(f) | Logistics - Port of Origin | alpha | | | | | | | |
| Q19a-3(g) | Logistics - Transhipment Port | alpha | | | | | | | |
| Q19a-3(h) | Logistics - Port of Destination | alpha | | | | | | | |
| Q19a-3(i) | Logisitics - Consumption Regoin (Destination) | alpha | | | | | | | |
| Q19a-3(j) | Total Delivery Time | numberic - no. of days | | | | | | | |
| Q19a-3(k) | Total Logistics Cost | memo with currency indicated | | | | | | | |
| Q19a-3(l) | Ocean Freight Service Cost | memo with currency indicated | | | | | | | |
| Q19a-3(m) | Rate of Delayed Delivery | numeric - percent | | | | | | | |
| Q19a-3(n) | Rate of Damaged Cargo | numeric - percent | | | | | | | |
| Q19a-4 | Commodity No. 4 | alpha | | | | | | | |
| Q19a-4(a) | Ave, Monthly Tonnage (in tons) | numeric - tons | | | | | | | |
| Q19a-4(b) | Type of Packing | alpha | | | | | | | |
| Q19a-4(c ) | No. of Deliveries / Month (Peak Month) | numeric | | | | | | | |
| Q19a-4(d) | No. of Deliveries / Month (Off-peak Month) | numeric | | | | | | | |
| Q19a-4(e) | Logistics - Production Region (Origin) | alpha | | | | | | | |
| Q19a-4(f) | Logistics - Port of Origin | alpha | | | | | | | |
| Q19a-4(g) | Logistics - Transhipment Port | alpha | | | | | | | |
| Q19a-4(h) | Logistics - Port of Destination | alpha | | | | | | | |
| Q19a-4(i) | Logisitics - Consumption Regoin (Destination) | alpha | | | | | | | |
| Q19a-4(j) | Total Delivery Time | numberic - no. of days | | | | | | | |
| Q19a-4(k) | Total Logistics Cost | memo with currency indicated | | | | | | | |
| Q19a-4(l) | Ocean Freight Service Cost | memo with currency indicated | | | | | | | |
| Q19a-4(m) | Rate of Delayed Delivery | numeric - percent | | | | | | | |
| Q19a-4(n) | Rate of Damaged Cargo | numeric - percent | | | | | | | |
| Q19a-5 | Commodity No. 5 | alpha | | | | | | | |
| Q19a-5(a) | Ave, Monthly Tonnage (in tons) | numeric - tons | | | | | | | |
| Q19a-5(b) | Type of Packing | alpha | | | | | | | |
| Q19a-5(c ) | No. of Deliveries / Month (Peak Month) | numeric | | | | | | | |
| Q19a-5(d) | No. of Deliveries / Month (Off-peak Month) | numeric | | | | | | | |
| Q19a-5(e) | Logistics - Production Region (Origin) | alpha | | | | | | | |
| Q19a-5(f) | Logistics - Port of Origin | alpha | | | | | | | |
| Q19a-5(g) | Logistics - Transhipment Port | alpha | | | | | | | |
| Q19a-5(h) | Logistics - Port of Destination | alpha | | | | | | | |
| Q19a-5(i) | Logisitics - Consumption Regoin (Destination) | alpha | | | | | | | |
| Q19a-5(j) | Total Delivery Time | numberic - no. of days | | | | | | | |
| Q19a-5(k) | Total Logistics Cost | memo with currency indicated | | | | | | | |
| Q19a-5(l) | Ocean Freight Service Cost | memo with currency indicated | | | | | | | |
| Q19a-5(m) | Rate of Delayed Delivery | numeric - percent | | | | | | | |
| Q19a-5(n) | Rate of Damaged Cargo | numeric - percent | | | | | | | |
| **Q19b** | **Imports (Actual)** | | | | | | | | |
| Q19b-1 | Commodity No. 1 | alpha | | | | | | | |
| Q19b-1(a) | Ave, Monthly Tonnage (in tons) | numeric - tons | | | | | | | |
| Q19b-1(b) | Type of Packing | alpha | | | | | | | |
| Q19b-1(c ) | No. of Deliveries / Month (Peak Month) | numeric | | | | | | | |

| | ASEAN RORO SHIPPER Survey Items | Record Type | Respondent 1 | Respondent 2 | Respondent 3 | Respondent 4 | Respondent 5 | Respondent … | Respondent n |
|---|---|---|---|---|---|---|---|---|---|
| Q19b-1(d) | No. of Deliveries / Month (Off-peak Month) | numeric | | | | | | | |
| Q19b-1(e) | Logistics - Production Region (Origin) | alpha | | | | | | | |
| Q19b-1(f) | Logistics - Port of Origin | alpha | | | | | | | |
| Q19b-1(g) | Logistics - Transhipment Port | alpha | | | | | | | |
| Q19b-1(h) | Logistics - Port of Destination | alpha | | | | | | | |
| Q19b-1(i) | Logisitics - Consumption Region (Destination) | alpha | | | | | | | |
| Q19b-1(j) | Total Delivery Time | numberic - no. of days | | | | | | | |
| Q19b-1(k) | Total Logistics Cost | memo with currency indicated | | | | | | | |
| Q19b-1(l) | Ocean Freight Service Cost | memo with currency indicated | | | | | | | |
| Q19b-1(m) | Rate of Delayed Delivery | numeric - percent | | | | | | | |
| Q19b-1(n) | Rate of Damaged Cargo | numeric - percent | | | | | | | |
| Q19b-2 | Commodity No. 2 | alpha | | | | | | | |
| Q19b-2(a) | Ave, Monthly Tonnage (in tons) | numeric - tons | | | | | | | |
| Q19b-2(b) | Type of Packing | alpha | | | | | | | |
| Q19b-2(c ) | No. of Deliveries / Month (Peak Month) | numeric | | | | | | | |
| Q19b-2(d) | No. of Deliveries / Month (Off-peak Month) | numeric | | | | | | | |
| Q19b-2(e) | Logistics - Production Region (Origin) | alpha | | | | | | | |
| Q19b-2(f) | Logistics - Port of Origin | alpha | | | | | | | |
| Q19b-2(g) | Logistics - Transhipment Port | alpha | | | | | | | |
| Q19b-2(h) | Logistics - Port of Destination | alpha | | | | | | | |
| Q19b-2(i) | Logisitics - Consumption Regoin (Destination) | alpha | | | | | | | |
| Q19b-2(j) | Total Delivery Time | numberic - no. of days | | | | | | | |
| Q19b-2(k) | Total Logistics Cost | memo with currency indicated | | | | | | | |
| Q19b-2(l) | Ocean Freight Service Cost | memo with currency indicated | | | | | | | |
| Q19b-2(m) | Rate of Delayed Delivery | numeric - percent | | | | | | | |
| Q19b-2(n) | Rate of Damaged Cargo | numeric - percent | | | | | | | |
| Q19b-3 | Commodity No. 3 | alpha | | | | | | | |
| Q19b-3(a) | Ave, Monthly Tonnage (in tons) | numeric - tons | | | | | | | |
| Q19b-3(b) | Type of Packing | alpha | | | | | | | |
| Q19b-3(c ) | No. of Deliveries / Month (Peak Month) | numeric | | | | | | | |
| Q19b-3(d) | No. of Deliveries / Month (Off-peak Month) | numeric | | | | | | | |
| Q19b-3(e) | Logistics - Production Region (Origin) | alpha | | | | | | | |
| Q19b-3(f) | Logistics - Port of Origin | alpha | | | | | | | |
| Q19b-3(g) | Logistics - Transhipment Port | alpha | | | | | | | |
| Q19b-3(h) | Logistics - Port of Destination | alpha | | | | | | | |
| Q19b-3(i) | Logisitics - Consumption Regoin (Destination) | alpha | | | | | | | |
| Q19b-3(j) | Total Delivery Time | numberic - no. of days | | | | | | | |
| Q19b-3(k) | Total Logistics Cost | memo with currency indicated | | | | | | | |
| Q19b-3(l) | Ocean Freight Service Cost | memo with currency indicated | | | | | | | |
| Q19b-3(m) | Rate of Delayed Delivery | numeric - percent | | | | | | | |
| Q19b-3(n) | Rate of Damaged Cargo | numeric - percent | | | | | | | |
| Q19b-4 | Commodity No. 4 | alpha | | | | | | | |
| Q19b-4(a) | Ave, Monthly Tonnage (in tons) | numeric - tons | | | | | | | |
| Q19b-4(b) | Type of Packing | alpha | | | | | | | |
| Q19b-4(c ) | No. of Deliveries / Month (Peak Month) | numeric | | | | | | | |
| Q19b-4(d) | No. of Deliveries / Month (Off-peak Month) | numeric | | | | | | | |
| Q19b-4(e) | Logistics - Production Region (Origin) | alpha | | | | | | | |
| Q19b-4(f) | Logistics - Port of Origin | alpha | | | | | | | |

| | ASEAN RORO SHIPPER Survey Items | Record Type | Respondent 1 | Respondent 2 | Respondent 3 | Respondent 4 | Respondent 5 | Respondent … | Respondent n |
|---|---|---|---|---|---|---|---|---|---|
| Q19b-4(g) | Logistics - Transhipment Port | alpha | | | | | | | |
| Q19b-4(h) | Logistics - Port of Destination | alpha | | | | | | | |
| Q19b-4(i) | Logisitics - Consumption Regoin (Destination) | alpha | | | | | | | |
| Q19b-4(j) | Total Delivery Time | numberic - no. of days | | | | | | | |
| Q19b-4(k) | Total Logistics Cost | memo with currency indicated | | | | | | | |
| Q19b-4(l) | Ocean Freight Service Cost | memo with currency indicated | | | | | | | |
| Q19b-4(m) | Rate of Delayed Delivery | numeric - percent | | | | | | | |
| Q19b-4(n) | Rate of Damaged Cargo | numeric - percent | | | | | | | |
| Q19b-5 | Commodity No. 5 | alpha | | | | | | | |
| Q19b-5(a) | Ave, Monthly Tonnage (in tons) | numeric - tons | | | | | | | |
| Q19b-5(b) | Type of Packing | alpha | | | | | | | |
| Q19b-5(c ) | No. of Deliveries / Month (Peak Month) | numeric | | | | | | | |
| Q19b-5(d) | No. of Deliveries / Month (Off-peak Month) | numeric | | | | | | | |
| Q19b-5(e) | Logistics - Production Region (Origin) | alpha | | | | | | | |
| Q19b-5(f) | Logistics - Port of Origin | alpha | | | | | | | |
| Q19b-5(g) | Logistics - Transhipment Port | alpha | | | | | | | |
| Q19b-5(h) | Logistics - Port of Destination | alpha | | | | | | | |
| Q19b-5(i) | Logisitics - Consumption Regoin (Destination) | alpha | | | | | | | |
| Q19b-5(j) | Total Delivery Time | numberic - no. of days | | | | | | | |
| Q19b-5(k) | Total Logistics Cost | memo with currency indicated | | | | | | | |
| Q19b-5(l) | Ocean Freight Service Cost | memo with currency indicated | | | | | | | |
| Q19b-5(m) | Rate of Delayed Delivery | numeric - percent | | | | | | | |
| Q19b-5(n) | Rate of Damaged Cargo | numeric - percent | | | | | | | |
| **Q20** | **2015 Forecast for Export/Import & Willingness to Use RoRo Service** | | | | | | | | |
| **Q20a** | **Exports (Forecast)** | | | | | | | | |
| Q20a-1 | Commodity 1 | | | | | | | | |
| Q20a-1(a) | Ave. Monthly Tonnage | numeric - tons | | | | | | | |
| Q20a-1(b) | Type of Packing | alpha | | | | | | | |
| Q20a-1(c ) | Production Region (Origin) | alpha | | | | | | | |
| Q20a-1(d) | Consumption Region (Destination) | alpha | | | | | | | |
| Q20a-1(f) | Acceptable Delivery Time | numeric - no. of days | | | | | | | |
| Q20a-1(g) | Acceptable Logistics Cost | numeric - currency | | | | | | | |
| Q20a-1(h) | Will Use New RoRo is overall logistics cost becomes lower | 1=yes; 2=no | | | | | | | |
| Q20a-1(i) | Will Use New RoRo is delivery time becomes shorter | 1=yes; 2=no | | | | | | | |
| Q20a-1(j) | Will Use New RoRo if logistics service becomes better | 1=yes; 2=no | | | | | | | |
| Q20a-1(k) | If no to any of these conditions, reason. | memo | | | | | | | |
| Q20a-2 | Commodity 2 | | | | | | | | |
| Q20a-2(a) | Ave. Monthly Tonnage | numeric - tons | | | | | | | |
| Q20a-2(b) | Type of Packing | alpha | | | | | | | |
| Q20a-2(c ) | Production Region (Origin) | alpha | | | | | | | |
| Q20a-2(d) | Consumption Region (Destination) | alpha | | | | | | | |
| Q20a-2(f) | Acceptable Delivery Time | numeric - no. of days | | | | | | | |
| Q20a-2(g) | Acceptable Logistics Cost | memo with currency indicated | | | | | | | |
| Q20a-2(h) | Will Use New RoRo is overall logistics cost becomes lower | 1=yes; 2=no | | | | | | | |
| Q20a-2(i) | Will Use New RoRo is delivery time becomes shorter | 1=yes; 2=no | | | | | | | |
| Q20a-2(j) | Will Use New RoRo if logistics service becomes better | 1=yes; 2=no | | | | | | | |
| Q20a-2(k) | If no to any of these conditions, reason. | memo | | | | | | | |
| Q20a-3 | Commodity 3 | | | | | | | | |

| | ASEAN RORO SHIPPER Survey Items | Record Type | Respondent 1 | Respondent 2 | Respondent 3 | Respondent 4 | Respondent 5 | Respondent … | Respondent n |
|---|---|---|---|---|---|---|---|---|---|
| Q20a-3(a) | Ave. Monthly Tonnage | numeric - tons | | | | | | | |
| Q20a-3(b) | Type of Packing | alpha | | | | | | | |
| Q20a-3(c ) | Production Region (Origin) | alpha | | | | | | | |
| Q20a-3(d) | Consumption Region (Destination) | alpha | | | | | | | |
| Q20a-3(f) | Acceptable Delivery Time | numeric - no. of days | | | | | | | |
| Q20a-3(g) | Acceptable Logistics Cost | memo with currency indicated | | | | | | | |
| Q20a-3(h) | Will Use New RoRo is overall logistics cost becomes lower | 1=yes; 2=no | | | | | | | |
| Q20a-3(i) | Will Use New RoRo is delivery time becomes shorter | 1=yes; 2=no | | | | | | | |
| Q20a-3(j) | Will Use New RoRo if logistics service becomes better | 1=yes; 2=no | | | | | | | |
| Q20a-3(k) | If no to any of these conditions, reason. | memo | | | | | | | |
| Q20a-4 | Commodity 4 | | | | | | | | |
| Q20a-4(a) | Ave. Monthly Tonnage | numeric - tons | | | | | | | |
| Q20a-4(b) | Type of Packing | alpha | | | | | | | |
| Q20a-4(c ) | Production Region (Origin) | alpha | | | | | | | |
| Q20a-4(d) | Consumption Region (Destination) | alpha | | | | | | | |
| Q20a-4(f) | Acceptable Delivery Time | numeric - no. of days | | | | | | | |
| Q20a-4(g) | Acceptable Logistics Cost | memo with currency indicated | | | | | | | |
| Q20a-4(h) | Will Use New RoRo is overall logistics cost becomes lower | 1=yes; 2=no | | | | | | | |
| Q20a-4(i) | Will Use New RoRo is delivery time becomes shorter | 1=yes; 2=no | | | | | | | |
| Q20a-4(j) | Will Use New RoRo if logistics service becomes better | 1=yes; 2=no | | | | | | | |
| Q20a-4(k) | If no to any of these conditions, reason. | memo | | | | | | | |
| Q20a-5 | Commodity 5 | | | | | | | | |
| Q20a-5(a) | Ave. Monthly Tonnage | numeric - tons | | | | | | | |
| Q20a-5(b) | Type of Packing | alpha | | | | | | | |
| Q20a-5(c ) | Production Region (Origin) | alpha | | | | | | | |
| Q20a-5(d) | Consumption Region (Destination) | alpha | | | | | | | |
| Q20a-5(f) | Acceptable Delivery Time | numeric - no. of days | | | | | | | |
| Q20a-5(g) | Acceptable Logistics Cost | memo with currency indicated | | | | | | | |
| Q20a-5(h) | Will Use New RoRo is overall logistics cost becomes lower | 1=yes; 2=no | | | | | | | |
| Q20a-5(i) | Will Use New RoRo is delivery time becomes shorter | 1=yes; 2=no | | | | | | | |
| Q20a-5(j) | Will Use New RoRo if logistics service becomes better | 1=yes; 2=no | | | | | | | |
| Q20a-5(k) | If no to any of these conditions, reason. | memo | | | | | | | |
| **Q20b** | **Imports (Forecast)** | | | | | | | | |
| Q20b-1 | Commodity 1 | | | | | | | | |
| Q20b-1(a) | Ave. Monthly Tonnage | numeric - tons | | | | | | | |
| Q20b-1(b) | Type of Packing | alpha | | | | | | | |
| Q20b-1(c ) | Production Region (Origin) | alpha | | | | | | | |
| Q20b-1(d) | Consumption Region (Destination) | alpha | | | | | | | |
| Q20b-1(f) | Acceptable Delivery Time | numeric - no. of days | | | | | | | |
| Q20b-1(g) | Acceptable Logistics Cost | memo with currency indicated | | | | | | | |
| Q20b-1(h) | Will Use New RoRo is overall logistics cost becomes lower | 1=yes; 2=no | | | | | | | |
| Q20b-1(i) | Will Use New RoRo is delivery time becomes shorter | 1=yes; 2=no | | | | | | | |
| Q20b-1(j) | Will Use New RoRo if logistics service becomes better | 1=yes; 2=no | | | | | | | |
| Q20b-1(k) | If no to any of these conditions, reason. | memo | | | | | | | |
| Q20b-2 | Commodity 2 | | | | | | | | |
| Q20b-2(a) | Ave. Monthly Tonnage | numeric - tons | | | | | | | |
| Q20b-2(b) | Type of Packing | alpha | | | | | | | |
| Q20b-2(c ) | Production Region (Origin) | alpha | | | | | | | |

| | ASEAN RORO SHIPPER Survey Items | Record Type | Respondent 1 | Respondent 2 | Respondent 3 | Respondent 4 | Respondent 5 | Respondent … | Respondent n |
|---|---|---|---|---|---|---|---|---|---|
| Q20b-2(d) | Consumption Region (Destination) | alpha | | | | | | | |
| Q20b-2(f) | Acceptable Delivery Time | numeric - no. of days | | | | | | | |
| Q20b-2(g) | Acceptable Logistics Cost | memo with currency indicated | | | | | | | |
| Q20b-2(h) | Will Use New RoRo is overall logistics cost becomes lower | 1=yes; 2=no | | | | | | | |
| Q20b-2(i) | Will Use New RoRo is delivery time becomes shorter | 1=yes; 2=no | | | | | | | |
| Q20b-2(j) | Will Use New RoRo if logistics service becomes better | 1=yes; 2=no | | | | | | | |
| Q20b-2(k) | If no to any of these conditions, reason. | memo | | | | | | | |
| Q20b-3 | Commodity 3 | | | | | | | | |
| Q20b-3(a) | Ave. Monthly Tonnage | numeric - tons | | | | | | | |
| Q20b-3(b) | Type of Packing | alpha | | | | | | | |
| Q20b-3(c ) | Production Region (Origin) | alpha | | | | | | | |
| Q20b-3(d) | Consumption Region (Destination) | alpha | | | | | | | |
| Q20b-3(f) | Acceptable Delivery Time | numeric - no. of days | | | | | | | |
| Q20b-3(g) | Acceptable Logistics Cost | memo with currency indicated | | | | | | | |
| Q20b-3(h) | Will Use New RoRo is overall logistics cost becomes lower | 1=yes; 2=no | | | | | | | |
| Q20b-3(i) | Will Use New RoRo is delivery time becomes shorter | 1=yes; 2=no | | | | | | | |
| Q20b-3(j) | Will Use New RoRo if logistics service becomes better | 1=yes; 2=no | | | | | | | |
| Q20b-3(k) | If no to any of these conditions, reason. | memo | | | | | | | |
| Q20b-4 | Commodity 4 | | | | | | | | |
| Q20b-4(a) | Ave. Monthly Tonnage | numeric - tons | | | | | | | |
| Q20b-4(b) | Type of Packing | alpha | | | | | | | |
| Q20b-4(c ) | Production Region (Origin) | alpha | | | | | | | |
| Q20b-4(d) | Consumption Region (Destination) | alpha | | | | | | | |
| Q20b-4(f) | Acceptable Delivery Time | numeric - no. of days | | | | | | | |
| Q20b-4(g) | Acceptable Logistics Cost | memo with currency indicated | | | | | | | |
| Q20b-4(h) | Will Use New RoRo is overall logistics cost becomes lower | 1=yes; 2=no | | | | | | | |
| Q20b-4(i) | Will Use New RoRo is delivery time becomes shorter | 1=yes; 2=no | | | | | | | |
| Q20b-4(j) | Will Use New RoRo if logistics service becomes better | 1=yes; 2=no | | | | | | | |
| Q20b-4(k) | If no to any of these conditions, reason. | memo | | | | | | | |
| Q20b-5 | Commodity 5 | | | | | | | | |
| Q20b-5(a) | Ave. Monthly Tonnage | numeric - tons | | | | | | | |
| Q20b-5(b) | Type of Packing | alpha | | | | | | | |
| Q20b-5(c ) | Production Region (Origin) | alpha | | | | | | | |
| Q20b-5(d) | Consumption Region (Destination) | alpha | | | | | | | |
| Q20b-5(f) | Acceptable Delivery Time | numeric - no. of days | | | | | | | |
| Q20b-5(g) | Acceptable Logistics Cost | memo with currency indicated | | | | | | | |
| Q20b-5(h) | Will Use New RoRo is overall logistics cost becomes lower | 1=yes; 2=no | | | | | | | |
| Q20b-5(i) | Will Use New RoRo is delivery time becomes shorter | 1=yes; 2=no | | | | | | | |
| Q20b-5(j) | Will Use New RoRo if logistics service becomes better | 1=yes; 2=no | | | | | | | |
| Q20b-5(k) | If no to any of these conditions, reason. | memo | | | | | | | |
| Q21 | Expectations from the New RoRo Service | memo | | | | | | | |
| Q22 | Anticipated Advantages/Disadvantages | | | | | | | | |
| Q22a-1 | Anticipated Advantages (1) | memo | | | | | | | |
| Q22a-2 | Anticipated Advantages (2) | memo | | | | | | | |
| Q22a-3 | Anticipated Advantages (3) | memo | | | | | | | |
| Q22a-4 | Anticipated Advantages (4) | memo | | | | | | | |
| Q22b-1 | Anticipated Disadvantages (1) | memo | | | | | | | |
| Q22b-2 | Anticipated Disadvantages (2) | memo | | | | | | | |

| | ASEAN RORO SHIPPER Survey Items | Record Type | Respondent 1 | Respondent 2 | Respondent 3 | Respondent 4 | Respondent 5 | Respondent … | Respondent n |
|---|---|---|---|---|---|---|---|---|---|
| Q22b-3 | Anticipated Disadvantages (3) | memo | | | | | | | |
| Q22b-4 | Anticipated Disadvantages (4) | memo | | | | | | | |
| Q23 | Other comments re planned RoRo | memo | | | | | | | |

Encoding Reference for TRAVEL / TOUR OPERATOR Survey

| | ASEAN RORO Tour Survey Items | Record Type | Respondent 1 | Respondent 2 | Respondent 3 | Respondent 4 | Respondent 5 | Respondent … | Respondent n |
|---|---|---|---|---|---|---|---|---|---|
| **Section I** | **Basic Information** | | | | | | | | |
| **Q1** | **Company Name** | **Alpha** | | | | | | | |
| **Q2** | **Respondent** | | | | | | | | |
| Q2a | Name of Respondent | Alpha | | | | | | | |
| Q2b | Designation | Alpha | | | | | | | |
| **Q3** | **Company** | | | | | | | | |
| Q3a | Company Address | Memo | | | | | | | |
| Q3b | Office Classification (HQ-Branch-Satellite) | HQ; Branch; Satellite | | | | | | | |
| **Q4** | **Contact Details** | | | | | | | | |
| Q4a | Tel. No. | numeric | | | | | | | |
| Q4b | Mobile No. | numeric | | | | | | | |
| Q4c | Fax No. | numeric | | | | | | | |
| Q4d | Email | memo | | | | | | | |
| **Section II** | **Company Operations** | | | | | | | | |
| **Q5** | **Type of Business** | | | | | | | | |
| Q5-1 | Ticketing and hotel reservations | 1 = encircled | | | | | | | |
| Q5-2 | Inbound tour packages | 1=encircled | | | | | | | |
| Q5-3 | Outbound tour packages | 1=encircled | | | | | | | |
| Q5-4 | Transport rental services | 1=encircled | | | | | | | |
| Q5-5 | General service agent for airlines | 1=encircled | | | | | | | |
| Q5-6 | Hotel operations | 1=encircled | | | | | | | |
| Q5-7 | Others; specified | 1=encircled | | | | | | | |
| **Q6** | **Total Number of Employees** | **numeric** | | | | | | | |
| **Q7** | **Total Capitalization (currency indicated Php or USD)** | **memo** | | | | | | | |
| **Q8** | **Total Gross Sales for 2011 (currency indicated Php or USD)** | **memo** | | | | | | | |
| **Q9** | **Tourists Handled 2009 to 2011** | | | | | | | | |
| Q9a-1 | 2009 Outbound- Dom | numeric | | | | | | | |
| Q9a-2 | 2009 Outbound- Intl | numeric | | | | | | | |
| Q9a-3 | 2009 **Destination of Out Intl.** | memo | | | | | | | |
| Q9b-1 | 2010 Outbound- Dom | numeric | | | | | | | |
| Q9b-2 | 2010 Outbound Intl | numeric | | | | | | | |
| Q9b-3 | 2010 **Destination of Out Intl** | memo | | | | | | | |
| Q9c-1 | 2011 Outbound-Domestics | numeric | | | | | | | |
| Q9c-2 | 2011 Outbound-Intl | numeric | | | | | | | |
| Q9c-3 | 2011 **Destination of Out Intl** | memo | | | | | | | |
| Q9d-1 | 2009 Inbound- Dom | numeric | | | | | | | |
| Q9d-2 | 2009 Inbound- Intl | numeric | | | | | | | |
| Q9d-3 | 2009 **Origin of In Intl.** | memo | | | | | | | |
| Q9e-1 | 2010 Inbound- Dom | numeric | | | | | | | |
| Q9e-2 | 2010 Inbound Intl | numeric | | | | | | | |
| Q9e-3 | 2010 **Origin of In Intl** | memo | | | | | | | |
| Q9f-1 | 2011 Inbound-Dom | numeric | | | | | | | |
| Q9f-2 | 2011 Inbound-Intl | numeric | | | | | | | |
| Q9f-3 | 2011 **Origin of In Intl** | memo | | | | | | | |
| **Q10** | **Major Origins, Transit, Final Destinations of Tourists** | | | | | | | | |
| Q10a-1 | Outbound - Origin | memo | | | | | | | |

| | ASEAN RORO Tour Survey Items | Record Type | Respondent 1 | Respondent 2 | Respondent 3 | Respondent 4 | Respondent 5 | Respondent … | Respondent n |
|---|---|---|---|---|---|---|---|---|---|
| Q10a-2 | Outbound - Transit Points | memo | | | | | | | |
| Q10a-3 | Outbound - Destinations | memo | | | | | | | |
| Q10b-1 | Inbound - Origin | memo | | | | | | | |
| Q10b-2 | Inbound - Transit Points | memo | | | | | | | |
| Q10b-3 | Inbound - Destinations | memo | | | | | | | |
| **Q11** | **Actual and Forecast Tours** | | | | | | | | |
| Q11-1a | Route 1 | memo | | | | | | | |
| Q11-1b | Duration | numeric | | | | | | | |
| Q11-1c | Ave. Price / pax | memo | | | | | | | |
| Q11-1d | Ave tourist/mo. 2011 | numeric | | | | | | | |
| Q11-1e | Ave. touris/mo 2015 | numeric | | | | | | | |
| Q11-1f | No. of Tours/mo (peak month) | numeric | | | | | | | |
| Q11-1g | No. of Tours/mo (Off-peak month) | numeric | | | | | | | |
| Q11-1h | Intl Route Trunk Section | memo | | | | | | | |
| Q11-1i | Mode | alpha | | | | | | | |
| Q11-1j | Ave. Transfer Time from Feeder | numeric | | | | | | | |
| Q11-1k | Domestic Route Feeder Section | memo | | | | | | | |
| Q11-1l | Mode | alpha | | | | | | | |
| Q11-2a | Route 2 | memo | | | | | | | |
| Q11-2b | Duration | numeric | | | | | | | |
| Q11-2c | Ave. Price / pax | memo | | | | | | | |
| Q11-2d | Ave tourist/mo. 2011 | numeric | | | | | | | |
| Q11-2e | Ave. touris/mo 2015 | numeric | | | | | | | |
| Q11-2f | No. of Tours/mo (peak month) | numeric | | | | | | | |
| Q11-2g | No. of Tours/mo (Off-peak month) | numeric | | | | | | | |
| Q11-2h | Intl Route Trunk Section | memo | | | | | | | |
| Q11-2i | Mode | alpha | | | | | | | |
| Q11-2j | Ave. Transfer Time from Feeder | numeric | | | | | | | |
| Q11-2k | Domestic Route Feeder Section | memo | | | | | | | |
| Q11-2l | Mode | alpha | | | | | | | |
| Q11-3a | Route 3 | memo | | | | | | | |
| Q11-3b | Duration | numeric | | | | | | | |
| Q11-3c | Ave. Price / pax | memo | | | | | | | |
| Q11-3d | Ave tourist/mo. 2011 | numeric | | | | | | | |
| Q11-3e | Ave. touris/mo 2015 | numeric | | | | | | | |
| Q11-3f | No. of Tours/mo (peak month) | numeric | | | | | | | |
| Q11-3g | No. of Tours/mo (Off-peak month) | numeric | | | | | | | |
| Q11-3h | Intl Route Trunk Section | memo | | | | | | | |
| Q11-3i | Mode | alpha | | | | | | | |
| Q11-3j | Ave. Transfer Time from Feeder | numeric | | | | | | | |
| Q11-3k | Domestic Route Feeder Section | memo | | | | | | | |
| Q11-3l | Mode | alpha | | | | | | | |
| Q11-4a | Route 4 | memo | | | | | | | |
| Q11-4b | Duration | numeric | | | | | | | |
| Q11-4c | Ave. Price / pax | memo | | | | | | | |
| Q11-4d | Ave tourist/mo. 2011 | numeric | | | | | | | |
| Q11-4e | Ave. touris/mo 2015 | numeric | | | | | | | |
| Q11-4f | No. of Tours/mo (peak month) | numeric | | | | | | | |

| | ASEAN RORO Tour Survey Items | Record Type | Respondent 1 | Respondent 2 | Respondent 3 | Respondent 4 | Respondent 5 | Respondent … | Respondent n |
|---|---|---|---|---|---|---|---|---|---|
| Q11-4g | No. of Tours/mo (Off-peak month) | numeric | | | | | | | |
| Q11-4h | Intl Route Trunk Section | memo | | | | | | | |
| Q11-4i | Mode | alpha | | | | | | | |
| Q11-4j | Ave. Transfer Time from Feeder | numeric | | | | | | | |
| Q11-4k | Domestic Route Feeder Section | memo | | | | | | | |
| Q11-4l | Mode | alpha | | | | | | | |
| Q11-5a | Route 5 | memo | | | | | | | |
| Q11-5b | Duration | numeric | | | | | | | |
| Q11-5c | Ave. Price / pax | memo | | | | | | | |
| Q11-5d | Ave tourist/mo. 2011 | numeric | | | | | | | |
| Q11-5e | Ave. touris/mo 2015 | numeric | | | | | | | |
| Q11-5f | No. of Tours/mo (peak month) | numeric | | | | | | | |
| Q11-5g | No. of Tours/mo (Off-peak month) | numeric | | | | | | | |
| Q11-5h | Intl Route Trunk Section | memo | | | | | | | |
| Q11-5i | Mode | alpha | | | | | | | |
| Q11-5j | Ave. Transfer Time from Feeder | numeric | | | | | | | |
| Q11-5k | Domestic Route Feeder Section | memo | | | | | | | |
| Q11-5l | Mode | alpha | | | | | | | |
| Q11-6a | Route 6 | memo | | | | | | | |
| Q11-6b | Duration | numeric | | | | | | | |
| Q11-6c | Ave. Price / pax | memo | | | | | | | |
| Q11-6d | Ave tourist/mo. 2011 | numeric | | | | | | | |
| Q11-6e | Ave. touris/mo 2015 | numeric | | | | | | | |
| Q11-6f | No. of Tours/mo (peak month) | numeric | | | | | | | |
| Q11-6g | No. of Tours/mo (Off-peak month) | numeric | | | | | | | |
| Q11-6h | Intl Route Trunk Section | memo | | | | | | | |
| Q11-6i | Mode | alpha | | | | | | | |
| Q11-6j | Ave. Transfer Time from Feeder | numeric | | | | | | | |
| Q11-6k | Domestic Route Feeder Section | memo | | | | | | | |
| Q11-6l | Mode | alpha | | | | | | | |
| **Section III** | **Passenger Transport Services** | | | | | | | | |
| Q12 | Expectations from RORO Service | memo | | | | | | | |
| Q13 | Anticipated Advantages and Disadvantages | | | | | | | | |
| Q13a | Anticipated Advantages | | | | | | | | |
| Q13b | Anticipated Disadvantages | | | | | | | | |
| Q14a | Will you be able to use RORO? | 1=yes; 2=no; 3=maybe | | | | | | | |
| Q14b | Reasons for yes and maybe using RORO | memo | | | | | | | |
| Q15a | Will you bring your vehicles ? | 1=yes; 2=no; 3=maybe | | | | | | | |
| Q15b | Reasons for yes and maybe bringing vehicles | memo | | | | | | | |
| Q16 | Willingness to Pay across the route | | | | | | | | |
| Q16b | fare per pax | memo | | | | | | | |
| Q16c | fare per vehicle | memo | | | | | | | |
| Q17 | Other comments or opinions | memo | | | | | | | |