In 2001 and 2002 the world’s shipping industry continued to enjoy a period of relative stability. Freight markets showed only their normal oscillating patterns so neither shipowners nor shipmanagers felt any urgent need to embark upon drastic cost-cutting measures likely to result in turbulence in the seafarers labour market. Consolidation in the tanker, container, reefer, car carrier and cruise trades contributed to the stabilisation process. As in other modern industries, large firms, anxious to defend their reputations and thence market share, tend to take employment questions seriously. Industries with high ownership-concentration ratios may not entirely give up on price competition but it is a characteristic feature of oligopolistic markets that firms are apt to be more differentiated by the quality of their products or services than by price. In these circumstances questions of workforce recruitment, retention and education and training typically become the subject of consideration and concern. These issues were certainly prominent in Norway and the UK in the 1960s and 1970s. Ownership concentration ratios were high in both countries and this made it relatively easy for the industry to actively look for solutions to what was a growing problem of labour turnover.

The recession of the 1980s and the subsequent globalisation of the labour market through flagging out of one kind or another, led to the abandonment of research and development programmes aimed at generating the sorts of manpower strategies then increasingly common in shore-based capital intensive industries. Of course the best laid plans can go adrift when markets encounter unanticipated and prolonged disturbance so it is distinctly encouraging that through the 1990s and continuing into the C21st, there has been a cautiously growing tendency among shipowners and shipmanagers to think strategically about the labour force. It has been especially noteworthy that the belief in the possibilities of technical fixes as means of eliminating what are curiously known as ‘human errors’ (it is, after all, finally impossible to think of any error devoid of human imprint) has been steadily displaced by a reassertion of the importance of the ‘human element’ which in context can be taken to mean shipowners and seafarers. At least in formal terms the ISM code has been important in this respect by aiming to codify unambiguous chains of responsibility linking ship and shore personnel. Initiatives from the IMO and the ILO, respectively on fraudulent certification of seafarers and labour standards, similarly emphasise the shift towards seeing labour as an asset to be nourished rather than as a cost to be minimised. These developments have yet to bear fruit but do hold out the possibility of a revival of progressive change.
Progressive change comes from progressive partnerships and social dialogue but there are of course shipowners who are deaf and blind to reason and reasonableness. All markets are stratified and at the bottom where economic survival is marginal, there continue to be pariah owners who show utter disregard for their crews and who operate structurally unsafe ships beyond hope of resurrection. Outrage at the very existence of these ships periodically surfaces when another crew is dumped on local voluntary organisations but despite the production of two useful OECD reports on sub-standard ships, the industry still needs someone to commission a thorough economic and political analysis of marginal operators and inadequacies in the regulatory environment which make it possible for them to trade. This is the sort of study than can be done by SIRC and we would be pleased to discuss funding arrangements with a philanthropic shipowner.

The inauguration of global collective bargaining machinery for ships covered by ITF agreements following an agreement between the International Maritime Employers Committee (IMEC) and the ITF in 2001 marks another extremely important step toward labour market stability. Taken together with the progressive tightening of Port State Control regimes and growing pressures on flag states to adopt rigorous and comparable regulatory standards, it is becoming clear that the general form of tripartite regulatory regimes once characteristic of the OECD states is tentatively emerging on the global stage.

Effective and professional labour market practices always need to be based on accurate and regularly produced information. The move toward global tripartism merely underlines the importance of being able to make policy on the basis of high quality intelligence. The SIRC portfolio of recently completed, continuing, recently commenced and planned studies will continue to inform the shipping industry’s decision-makers.

Since all SIRC research is designed to be relevant to current issues and policy debates we have continued to devise new and better ways of bringing our work to the notice of interested parties. The biennial symposium in 2001 attracted a large and representative audience from around the world. Maritime administrators, shipowners, trade unions, shipmanagers, classification societies, insurers, international maritime organisations and associations and welfare agencies were all represented. Beginning in 2001 we also organised a one-day seminar in Singapore for shipowners, trade unions and welfare agencies and we aim to continue with this practice in 2003. In future and also beginning in 2003, we shall begin a series of one-day seminars dealing in a more concentrated way with the findings of maturing research projects. Our current policy of ‘by invitation only’ audiences will be continued.
Hard copy and web publications will continue to be SIRC’s main method of bringing its research activities into the public domain. Where reports largely consist of comprehensive datasets we will be increasingly publishing in packages consisting of hard copy and a CD ROM. Wherever possible these publications will be produced with commercial partners although our policy of giving substantial discounts to educational and charitable institutions will be continued. We are also actively seeking to further develop our policy of bringing our work to the attention of seafarers. Currently our main outlets in this respect are the Mission to Seafarers’ bi-monthly, *The Sea*, and the ITF’s bi-annual, *The Seafarers’ Bulletin*. We are looking for opportunities to syndicate these articles in company newsletters, trade union magazines and electronic newspapers with seafarers readerships. As with our research programme, so too with our publications and seminar programmes, we aim always to reach and reliably and accurately inform everyone in the shipping industry in forms most suited to their needs and purposes.

## Research Programme

SIRC’s research programme has been significantly enlarged in 2001 and 2002 and now consists of two elements. *Recurrent Projects*, focused on labour market surveys concerned with the global labour market and the regulatory capacities of flag states will be published respectively annually and biennially now that the viability and continuing policy-informing value of these projects has been established. These studies are now a permanent feature of the SIRC programme. *Standard Projects*, which are either funded from external sources or from core funding for problem-focused studies and for finite periods, continue to account for the bulk of research. Some of these projects, typically those commissioned by government agencies and international associations, are usually small in scale, often have short lead times and do not always entail original research requiring the collection and analysis of new datasets. Projects of this sort have now become a regular feature of the SIRC programme.

### Recurrent Projects

*The Global Labour Market*

For the moment and probably for some time to come, the only accurate account of the crewing of the world’s merchant ships is produced by the SIRC annual surveys of ships’ crews. The crew surveys are based upon crew lists collected from government immigration and maritime agencies and canal, waterway and port authorities in Europe, the Americas, the Middle East and Asia. The first
survey was conducted in 1993 but was then limited to ships of all flags arriving in a sample of UK ports. The coverage since then has steadily increased to the point where, from 2002, there is an annual ‘census’ conducted in the month of March of each year. The first report, for the year 2000, was published in collaboration with Lloyd's Register-Fairplay in 2002. The 2002 survey, to be published in the summer of 2003, covers some 6000 ships engaged in international trade and 120,000 seafarers.

From 2003 the survey will be supplemented by in-depth reports of seafarers’ labour markets in various world regions. The 2003 report will carry detailed studies of the Philippines and Turkey and country reports of this nature will be an annual feature. For example, the 2003 survey currently in progress and for publication in 2004, will carry substantial reports of studies in the PRC and a group of countries in Central and South America. The country reports have all involved original research projects of finite length and they are reported under the various sub-headings in the Standard Projects section below. It is hoped to conduct an additional survey of wages and conditions of service in 2003 so that from 2004 onwards the annual reports will cover all basic aspects of the global labour market. A fuller specification of the annual survey will be prepared early in 2003 for circulation to all shipping industry constituencies.

The Flag State Audit

Originally commissioned by the ITF to a specification devised by SIRC, the first Audit report was delivered to the ITF in 2001. Copyright was released to SIRC in 2002 and the Audit was then re-run for 37 flag states but to a revised schedule of criteria and method of evaluation. The 600-page report was prepared for publication early in 2003 in the form of a ‘hard copy’ written guide to the criteria and evaluative procedures, and a CD-ROM providing a full analysis for all 37 states.

The audit assumes that issues relating to the seafaring labour force are of equivalent importance to those concerned with administrative and technical matters. A unique part of the Flag State Audit has been the development of a ratings system which allows the reader to compare at-a-glance, the performance of flag states across a range of measures. In addition to providing an overall rating, the system analyses the effectiveness of regulatory regimes in five distinct categories and assigns a grade, ranging from A-E (where A=best practice) for each of these areas of activity. Overall, the study presents: an extensive descriptive analysis of the operation of flag states; a critical discussion of world shipping’s regulatory environment; and a readily accessible indexing system which offers a quick analysis of the regulatory effectiveness of flag states across the range of their responsibilities.

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1 Crewing the International Merchant Fleet.
2 Flag State Audit 2003
In its current form the Audit accounts for some 70 per cent of the world’s merchant fleet. A supplement planned for publication in 2003 will cover a further five flags bringing the world fleet coverage up to approximately 90 per cent. The current intention is to repeat the Audit on a two-yearly basis. Since there is mounting pressure on flag states to conform to high regulatory standards but as yet no universally agreed set of standards, the SIRC Audit is both timely and relevant.

**Standard Projects**

All projects reported in this section have been financed by external grants and commissions or with core-funds. Almost all externally-funded projects either began ‘life’ as core-funded feasibility studies, or attracted external finance as a result of reputation earned in the course of conducting core-funded projects. In a few cases core-funding has supported projects for which external funding was unavailable.

**Projects Completed**

*The Impact of Information and Communication Technology on Seafarers: A Pilot Study*, core funded, completed December 2002.

*UK Seafarers and Their Families*, core-funded, delivered October 2002.


*Seafarers’ Labour Market in Turkey*, core-funded, delivered March 2002.

*Transnational Seafarer Communities*, grant funded by ESRC, delivered January 2002.3


*International Surveillance of Seafarers’ Health and Working Environment*, grant funded by the University of Southern Denmark, delivered December 2001.

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3 End of award final reports to the ESRC are graded. This project was rated as ‘outstanding’.


Flag State Audit, commissioned by ITF, delivered June 2001.


A Study of Fraudulent Practices Associated with Certificates of Competency & Endorsements, commissioned by IMO, delivered January 2001.

Feasibility Work for a Cohort Study of Seafarers’ Health, core-funded, delivered June 2000.

New and Continuing Projects

Leadership Training, grant funded by the British Academy, completes March 2003.

Abandoned Ships and Their Crews, core-funded, completes April 2003.

Feasibility of Setting up a Database for UK non-certificated Officers and Ratings, funded by UK Department for Transport, completes March 2003.


Fatigue, Health and Injury Among Merchant Seafarers, Phase 2, grant funded by the UK Maritime and Coastguard Agency, the UK Health and Safety Executive, NUMAST, completes June 2003.
Seafarers’ Sexual Risk Behaviour, core-funded, completes September 2003.


Seafarers’ Labour Market Regional Studies Report: Honduras, Mexico, Panama, Colombia, Ecuador, Venezuela, core-funded, completes September 2003.

Seafarer Trade Unionism in Europe, core-funded completes October 2003.

Cruise Ships’ Crews, core-funded, completes November 2003.

Problems of Global Governance on Seafarers’ Health and Safety, grant funded by ESRC, completes May 2004.

Seafarers’ Labour Market Reports, India, core-funded, completes July 2004.

Car Carrier Crews, grant funded by ESRC, completes August 2004.

Recruitment and Retention of Officer Cadets in Portugal and Spain, part core-funded, completes September 2005.

Emotional Health: its Impact on Recruitment and Retention of UK Officer Cadets, part core-funded, completes September 2005.


**Staffing**

There have been few changes in 2001 and 2002. Dr Tony Alderton left in the summer of 2001 for a post as senior researcher with Kent County Council. In the autumn of 2001 and on the expiry of her contract as Research Associate on the ESRC-funded Transnational Communities project, Dr Helen Sampson was appointed Senior Research Associate. In November 2001, on receiving a post-doctoral fellowship part-funded by the Portuguese government’s Department of Science and Technology, Dr Jaime Veiga was appointed as a Research Associate. In February 2002, Dr Maragtas Amante, an associate professor in the School of
Labour Relations at the University of the Philippines, was appointed to the Mols Sorensen Post-Doctoral fellowship. In April 2002, Ms Ailbhe Burke was appointed Research Associate to work on the fatigue project where she was joined, in July 2002, by Mr Paul Allen. In July 2002, Drs Zhao and Sampson were appointed as Deputy Directors with responsibilities for developing collaborative research networks in Asia. Dr Nick Bailey was appointed Seafarer/Researcher in September 2002. Dr Bailey, until recently chief officer aboard the British Antarctic Survey ship, *Shackleton*, holds a DPhil in philosophy from Oxford University and has extensive seagoing experience in dredgers and mini-bulkers.

**Staff in Post at 31 December 2002**

Dr Maragtas Amante  
Mr Paul Allen  
Dr Nicholas Bailey  
Mr Phillip Belcher  
Professor Michael Bloor  
Ms Ailbhe Burke  
Ms Louise Deeley (Admin)  
Mr Neil Ellis  
Ms Maria Goldoni (Admin)  
Dr Erol Kahveci  
Professor Tony Lane  
Dr Bernardo Obando-Rojas  
Dr Helen Sampson  
Mr Tim Shelly (Data Management)  
Dr Michelle Thomas  
Dr Jaime Veiga  
Dr Nik Winchester  
Dr Bin Wu  
Dr Minghua Zhao

**Management Board**

Both Dr Dennis Bell, Consultant in Occupational Medicine, and Mr Bob Thomas, Finance Officer, ITF, resigned in June 2002 after serving for six years. Dr Eddie Coyle, a specialist in Public Health Medicine and Mr Jon Whitlow, ITF Secretary for Seafarers, Fisheries and Inland Waterways were elected to the Board.
Publications

Newspapers and Magazines


Professional Publications


Veiga, J., (2002) ‘Uma Questao tambem de imagem’ [It is also a question of image], (in Portuguese), Revista de Marinha, n. 906. 18, February/March.


Commissioned Reports


Alderton, T., Winchester N., (2001) Flag State Audit, commissioned by the ITF.


SIRC Papers


Other Publications


Publications in Press


**Publications in Preparation**


**Conferences, Seminars, Lectures**


Kahveci, E., ‘Invisible Seafarer Communities’ at the B.HERE engage international conference November 2002 in collaboration with BALTIC at Newcastle University.


Lane, A.D., ‘The Life and Times of the Modern Merchant Seafarer, a Possible Story of the Creation of a New Global Order’, Social & Environmental Sciences Faculty Seminar, Liverpool University, 27 November 2002.


Other Conferences & Seminars


Other Developments

The photographic archive which developed out of research voyages for the ESRC-funded Transnational Seafarer Communities Project is beginning to attract public interest. Photographs have been used to illustrate various articles in: Lloyd’s List; ITF Seafarers’ Trust Annual Reports; ITF Seafarers’ Bulletin; NUMAST Telegraph; Mission to Seafarers The Sea; War on Want ITF publication on work aboard cruise ships, Sweatships; Shipping Company Newsletters.

Mr John Goodwin recently retired as a Senior Administrative Officer in Cardiff University, is working on a part-time basis to catalogue photographs and devise means of preserving them in a form making them available for public use.