

**FORMATIVE EVALUATION OF THE
APL-LO NORWAY PARTNERSHIP
PROGRAM IN HONG KONG**
*(BUILDING SOCIAL MOVEMENT UNIONS AMONG
FILIPINO MIGRANT WORKERS IN HONG KONG)*

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GUIDE TO THE ACRONYMS

Acronym	Full Rendering
AMC	Asian Migrant Center
FADWU	Federation of Asian Domestic Workers’ Union
FDHGU	Federation of Domestic Helper General Union
FDWU	Filipino Domestic Workers’ Union
FMWU	Filipino Migrant Workers’ Union
HKCTU	Hong Kong Confederation of Trade Unions
HSW	Household Service Worker
ICT	Information and Communication Technology
ILO	International Labour Organisation
JDC	Junior Dance Club
KAI AIDO	KAI AIDO Karate Ryu International
ODWU	Overseas Domestic Workers’ Union
OFW	Overseas Filipino Workers
PMC	Project Management Committee
VisMinAMWA	Visayas-Mindanao Active Migrants’ Association

SUMMARY WITH MAIN FINDINGS AND RECOMMENDATIONS

Migrant workers are an asset to every country where they bring their labour. Let us give them the dignity they deserve as human beings and the respect they deserve as workers. --Juan Somavia, Director General of the ILO

Main Achievements of the APL-HK Project (CY 2006-2009)

- 1) Establish the APL-HK as an alternative political center for the promotion and defense of the rights and welfare of Filipino migrant workers in Hong Kong relatively independent of its strategic partners principally of the AMC and was able to establish its own operating office and networks within the Filipino migrant community.
- 2) Despite the many setbacks in the past it was able to gather within its umbrella two of the more viable Filipino trade unions in Hong Kong namely the FDWU and the ODWU. In addition it was able to attract the support of three more non-union Filipino migrant associations with a combined membership of 205. This figure was achieved after trial and error in organizing which resulted in the rapid fluctuation in membership since 2006.
- 3) And in the last General Assembly of the APL-HK, it was able to elect the first set of organic migrant worker-leaders as board of the federation, phasing out the interim board of the APL-HK.

Main Challenges and Recommendations

Notwithstanding the above achievements, there are many challenges and constraints which need to be addressed for the successful continuation of the program.

The main challenge is associated with the design of the current LO-Norway supported project especially in the area of *effectiveness and efficiency*. Unless these challenges are addressed, the APL might find it difficult to sustain its momentum in unionizing migrant labor in Hong Kong. These challenges or weaknesses are enumerated below:

On the Question of Project Design:

- 1) It is highly recommended that APL-HK review its project design and try to address the identified design weaknesses such as defining the strategic objective of project, the specific objectives and the corresponding activities that will support the attainment of these specific objectives. Relevant indicators need to be developed to measure the attainment of the specific objectives. If done properly, the monitoring and evaluation of the immediate effects and impact of the project on the unionization of household service workers (HSWs) in Hong Kong will be more manageable and relevant.

On Organizing Effort of APL

- 2) Incorporate and organize the cell system as described above in the organization of HSWs which will serve as its basic unit. The cell shall serve as venue for membership education, collection platform for dues and other membership contribution, organizational communication and mobilization of the APL-HK members.
- 3) Leverage Information & Communication Technology (ICT) (e.g. use of cellphone, e-mails, e-groups in Yahoo, Gmail and/or Facebook) with the cell system to enhance communication and coordination in-between meetings of cells and the union's multifarious activities.
- 4) Corollary to this is the development of a pool of union educators/cadres who will lead and manage these cells. These educators should be trained and accredited properly by the APL and should be monitored and guided regularly by a functional education committee.
- 5) Serious attention must be given to the development of curriculum, TU handbook and other portable & non-electronic teaching aids for the use of both the educators and the general members.
- 6) Institute traditions, rituals and symbols that enhances unity on three levels: as APL members, as part of the working class and as Filipino citizens.

On the Question of Strategy, Inter-Institutional Relation

- 7) First of all there is an urgent need for APL to define the strategic thrust of the Center in the field of migrant labor. These should include defining who the strategic partners are of the APL in this enterprise and what their roles and functions are in the whole scheme of things. It is essential that APL together with its partners such as the LO-Norway, AMC and the HKCTU to sit down together to thresh out these matters. After all, it is these entities that have supported the APL in its work in Hong Kong.
- 8) Next define the organizing strategy that will be required to organize the HSWs. If it means transforming the APL-HK into a “1-industry union” what does this mean? What will it take to convert APL-HK into a union? What steps are to be taken to make this a reality within a concrete and reasonable timeframe? In this scenario, what will be its legal and political implication vis-à-vis the FADWU-HKCTU and APL Philippine? All these strategic questions need to be answered soonest and should not be left to the sole discretion of the of the APL-HK organizing team.

On Question of Governance and Program Management

- 9) Once the above concerns are settled, there is a need to determine once and for all if there is a need for an oversight body like the Project Management Committee (PMC) in the management of the APL-HK-LO-Norway project. Is it still relevant and useful for all parties concerned especially for the APL staff and the affiliates of the APL-HK? If yes, who should compose this PMC and what are their roles and functions both as individual stakeholders and as a collegial body? There is also a need to establish better operating policies, systems and procedures for a more effective and efficient operation of the PMC which would include a more regular and frequent interaction among its member-stakeholders and not highly dependent upon the physical presence of APL General Secretary. If no, then what supervisory body or mechanism should be created to guide the organizing work of the APL organizing team in Hong Kong on a more regular and substantial basis. If the PMC will be retained or whatever analogous supervisory mechanism that shall be created it is essential that the necessary budget is allocated to make this a reality.
- 10) Finally, the relationship between the PMC or any supervisory mechanism and the present local leadership or governing board of the APL-HK must be clearly defined to avoid any overlap in roles and functions.
- 11) Corollary to this, there may be a need for the affiliates of the APL-HK together with APL-Philippines and the PMC to re-examine the constitution and by-laws of the APL-HK so that it will be in consonance with its true nature (whether it’s a union or a “political labor alliance”).
- 12) Define clearly the division of labor between the two organizers of APL to enhance their complementation and synergy.
- 13) Identify clearly which among the major tasks and components of the projects that cannot be handled competently by any of the two APL staff and explore the possibility of sub-contracting the job to any of the partners of APL whether in Hong Kong or in the Philippines.
- 14) Define the compensation package (both salary and benefits) for the two organizers taking into consideration their qualification, experience, and job responsibilities.
- 15) Address as soon as possible all potential issues surrounding the employment of Sis. Shiella as an APL staff vis-à-vis her role as the APL-HK President to avoid future complications for APL-HK.
- 16) Define and enact a realistic dues structure and service fees for specific services such as seminars, legal service, sheltering and the like taking into consideration the APL-HK core expenses.
- 17) Set up a good dues collection system which is integrated into a cell system as the basic unit of APL-HK.
- 18) Explore and if feasible, set up an APL-HK Solidarity Fund to fund the some portions of the APL-HK operation in the future.

II. BACKGROUND AND SCOPE OF REVIEW

Background and Objectives

As part of the continuing effort to improve the performance of the APL-HKCTU-LO Norway Project Cooperation Project entitled: **Building Social Movement Unionism Among Filipino Migrant Workers in Hong Kong**, the LO Norway – APL’s main solidarity partner proposed the conduct of a

formative external evaluation; the process of which, was agreed to by Bro. Floro Francisco of LO-Norway. This evaluation will form part of the usual process of APL's project renewal for the next project cycle.

The external evaluation was conducted by Prof. Rainier V. Almazan of the University of the Philippines. He was assisted by Ms. Catharine Adaro—a research associate from the same university. The evaluation mission included a four day study visit in Hong Kong from December 4 to 6, 2010. The visit was synchronized with the conduct of some of the major APL-HK activities held during this period such as the General Membership Assembly. These activities facilitated the participation of some of the leaders of APL-HK in this evaluation mission.

This does not include the series of preparatory and other follow up meetings conducted by the evaluator with Bro. Floro Francisco. These meetings were conducted to lay down the plan for the evaluation. The evaluation enjoyed substantial support from the APL senior staff under the leadership of General Secretary, Bro. Josua Mata and the Deputy General Secretary Edwin Bustillos.

The Terms of Reference (TOR) states that the main focus of the study is to conduct a formative evaluation with the following aims in mind: 1) To assess the results of the support provided to APL and the affiliated unions by LO Norway; and 2) to assess the modality of cooperation with the APL-Hong Kong and provide recommendations on areas for improvement, in particular related to monitoring and reporting on performance by APL.

Methodology

The study was conducted using the following methods: key informant interviews, focus group discussions (FGD), site visit and direct observation and use of secondary data from APL reports. The Mission has interviewed a total of 7 key informants representing the 3 major stakeholders in the APL-HK project: 2 responsible staff from the Asian Migrant Center (AMC; Rex Varona and Marissa de Guzman), Sis. Elizabeth Tang, a senior official of the Hong Kong Confederation of Trade Unions (HKCTU), 2 APL-HK staff (Sisters Luella Mirafuentes and Shiella Estrada) and 2 senior officials from APL Philippines (Bros. Josua Mata and Edwin Bustillos). Furthermore, 2 FGDs were conducted and attended by around 12 participants from the ranks of the mass leaders of the APL-HK.

It must be emphasized that the evaluation mission is very limited in scope considering that it was only conducted in 4 days. Hence, it will be difficult to generalize about the whole situation of the project and its impact on Filipino HSWs based on a very limited number of observations, interviews and focus group discussions (FGDs). Nevertheless, the findings of this rather short and rapid study can still give insights into the progress and challenges facing both the project and its beneficiaries—the Filipino HSWs so that the LO-Norway and the APL leadership can fine tune their approaches in unionizing Filipino migrant workers, especially in Hong Kong.

III. OVERVIEW OF APL PROJECT:

Brief Background of the Program

The *APL-HK* project is being implemented since 2006 through the collaborative initiative of the Alliance for Progressive Labor (APL) in the Philippines and the Norwegian Confederation of Trade Unions (LO-Norway) with the support of the Asian Migrant Center (AMC)¹ and the Hong Kong Confederation of Trade Unions (HKCTU)². According to APL project documents, the main focus of this project is to strengthen and expand APL's union organizing campaign among Filipino domestic

¹ Asian Migrant Center— The AMC is a Hong Kong based Asian regional NGO specializing in knowledge— oriented services related to Asian labor migration such as information exchange, research & monitoring. It is also involved in a region wide advocacy in behalf of migrant labor either on its own or in coordination with local or Asian wide networks and coalitions.

² Hong Kong Confederation of Trade Unions-- The HKCTU is a pro-democracy labor and political group in the Hong Kong. It was established in 1990 and has around 160,000 members in 61 affiliates (mainly trade unions in various sectors which include foreign migrant workers in Hong Kong).

workers in Hong Kong. In particular, the project aims to achieve the following specific objectives in a span of 4 years from 2006 to 2009:

1. To consolidate and expand the Filipino domestic worker's federation in Hong Kong;
2. To build the organizational capacity of the Filipino domestic worker's federation in Hong Kong;
3. To develop the migrant worker's union's education program, including curriculum, education materials and the like;
4. To deepen APL's integration with the Filipino domestic worker's federation in Hong Kong;
5. To strengthen linkages between the APL, HKCTU, and migrant NGOs, especially in terms of coordinating its efforts in fighting for migrant workers' rights; and,
6. To develop APL's capacity to advocate migrant worker's rights.

There are 10 specific objectives with some targets indicated in the original proposal of APL. However, in the succeeding amended project proposals to the LO-Norway, many of these targets were adjusted and re-adjusted in the next four years (Please see Annex 1 for details of the 10 specific objectives).

Budget Requirement:

The original four-year project requested for a grant support of US\$ 270,700.00 from LO-Norway. The APL on the other hand, was expected to generate around US\$ 9,840.00 as its counterpart funding. The combined funding for the project is US\$280,540.00.

IV. EVALUATION OF PROGRAM PERFORMANCE

This section of the paper will concentrate on evaluating the performance of the APL program using the following criteria: relevance; outreach and effectiveness; and strategy, inter-institutional relations, governance and management

1. PROGRAM RELEVANCE

Relevance is the extent to which the objectives and design of the project are consistent with current global, national and local challenges, concerns and priorities. Shortcomings in relevance occurs when the 'supply or demand side' for the project is not based on society's challenges, concerns, policies and priorities concerning migrant labor (or household service workers or HSWs³) in general. Furthermore, programs of similar intention of other entities should not compete with one another or duplicate each other's efforts to avoid wastage of valuable resources.

A. APL's Social Movement Unionism and Migrant Work

The APL, since its inception, has always thought of organizing migrant workers as an intrinsic part of its strategy of social movement unionism. As early as 1996, the APL has realized that "issues heretofore common to all workers are becoming blurred and unarticulated as more and more Filipinos find themselves divided into several subsectors (formal and informal, overseas Filipino worker (OFWs), women workers, child labor, etc.). Without a common thread, collective action as a sector is increasingly becoming impossible." (APL Strategy Paper as cited in 2006 APL-HK Proposal)

It was for this reason that the APL embarked on promoting social movement unionism as its main strategy to strengthen the Philippine labor movement. "It is a kind of unionism that reaches out to the broadest base of the non-owning, marginalized working class who are either unorganized or organized into various forms of aggregations. It is a kind of social struggle that seeks to encompass economic, political, and cultural dimensions." (2006 APL-HK Proposal)

³ The *Household Service Worker (HSW)* is now the technical term used by the Philippine government especially by the Philippine Overseas Employment Administration (POEA) to describe a domestic worker and to emphasize the fact that domestic work is work. The term was first proposed at an international meeting on domestic work organized by the International Restructuring Education Network Europe (IRENE), the Netherlands Trade Union Confederation (FNV), Asian Domestic Workers network, Committee for Asian Women and Women in Informal Employment (WIEGO) in Amsterdam in November 2006.

Under the framework of the SMU, the APL has started organizing migrant workers beginning with the so-called “blacklisted” seafarers in the Philippines and playing supporting role in advocating for migrants rights. The decision to organize migrant workers is based on the fact that migrant workers or overseas Filipinos form about 11% of the total population of the Philippines which is equivalent to about 8.7 million to 11 million workers (Wikipedia 2010).

Each year, more than a million Filipinos leave to work abroad through overseas employment agencies and other programs, including government sponsored ones. Latest POEA (2009) reports that domestic helpers and personal service workers (more aptly called household service workers or HSWs) are the majority of positions filled by women. Others emigrate and become permanent residents of other countries. Overseas Filipinos often work as health professionals, IT professionals, engineers, architects, entertainers, technicians, teachers, military servicemen, seafarers among others.

The Wikipedia (2010) reported that money sent by migrant workers or overseas Filipino workers (OFWs) back to the Philippines is a major inflow in the country's economy, amounting to more than US\$10 billion in 2005. This makes the country the fourth largest recipient of foreign remittances behind India, China, and Mexico. The amount represents 13.5% of the Philippines' GDP, the largest in proportion to the domestic economy among the four countries mentioned. Overseas Filipinos sent \$17.3 billion worth of remittances to the Philippines in 2009, up from \$13 billion in 2006 which was the highest among prior years.

But as the APL has reported, “migration has created a layer of workers who are very vulnerable to exploitation. In most cases, the types of jobs that are open to migrant workers are mainly ‘dirty, dangerous and disdained’ type (or what is called the 3Ds). Often they are also subjected to discrimination, racism and various forms oppressions (class and gender).”

From the perspective of the magnitude of their numbers, their economic contribution and exploited condition it is clear that any organizing or advocacy program implemented in the name of migrant workers is definitely a strategic move in the right direction.

B. LO-Norway and APL-HK

The APL-HK project is also in line with Norway’s priority of “strengthening civil society” and using them as channels for development assistance as stated in a NORAD document (2006). The NORAD believes that civil society which includes trade unions can be relied upon to support the priorities of Norway especially in the field of human rights, peace-building and humanitarian assistance. Although the 2000 & 2006 NORAD reports emphasized that there might be a need to strengthen coordination and reporting capability of NGOs.

Given these priorities and contribution the NORAD and LO-Norway has continued supporting the APL-HK project for the last 4 years since 2006. This attention to the concerns of APL-HK can be gleaned at the amount of investment poured by the LO-Norway and the NORAD into the combined APL-HK project series and since 2006 (See Table 1).

Table 1: NORAD-LO Norway Investment in APL-HK Project

Project Series	Year	Exchange Rate*	US\$	HK\$
Project 1	2006	US\$1- HK\$7.50	61,421.82	460,663.65
Project 2	2007	US\$1- HK\$7.49	68,260.32	511,269.79
Project 3	2008	US\$1- HK\$7.74	87,954.00	680,763.96
Project 4	2009	US\$1- HK\$7.67	79,280.50	608,081.43
Grand Total			296,916.64	2,260,778.83

Source: APL Project Reports 2006-2009; *Exchange rate derived from APL Project Reports

So for the period 2006 to 2009, the LO-Norway and NORAD has invested a substantial amount of development funding totaling to HK\$2,260,779 or approximately US\$296,917 to support the efforts of the APL to address the unionization efforts of Filipino migrant labor under the APL project series.

Conclusion

From the preceding discussions it can be established that the APL-HK project is as relevant as ever not only for the Philippine labor movement but also for the Philippines and other migrant workers from other Asian countries. Furthermore, the very context in which the project operates demonstrates its timeliness and responsiveness to issues of worker migration especially those involving the Filipino HSWs in Hong Kong.

2. PROGRAM OUTREACH AND EFFECTIVENESS

Outreach and effectiveness basically refers to extent by which the development objectives have been achieved thus far taking into account their relative importance. It must be pointed out that *not all* objectives are of equal importance. Performance gaps in the attainment of objectives have to do either with the **number** of objectives that have not been achieved or with the **extent** to which one or more objectives have not been achieved. Positive unintended results may also be regarded as additional achievements if convincingly documented.

2.1) Issues about Project Design

The way the APL-HK project was designed is largely similar to the project design of the primary APL Philippines project supported by the LO-Norway. Hence many of its design deficiencies mirror the weaknesses of the APL Philippines project. As such there is some difficulty in assessing project outreach and effectiveness of the LO-Norway supported project because of several concerns related to project design. These design deficiencies are as follows:

2.1.1) Project objectives are ambiguous and targets are continuously shifting. The indicated project objectives of the original 4-year project proposal are not clearly crafted to the extent that it's attainment over time can be tracked and measured. As was the practice in the APL Philippines project, the APL-HK project has likewise exhibited the "moving target syndrome" where annual objectives or targets are constantly in flux.

2.1.2) Corollary to the above issue, performance indicators are either inadequate or missing. This is the reason why tracking and measuring the progress of the project is rather a big challenge both for APL and the LO-Norway. As the evaluator has indicated in the main APL Philippines project, "*you cannot manage what you cannot measure.*" Without these elements, it would be difficult for APL to focus its work in the most strategic and essential objectives. An example of this is the difficulty of measuring the claim that an organization or union has been "consolidated". Another is the difficulty of measuring a claim that a group of leaders have been "trained" and that they are now "assisting" in conducting training programs like the BTU.

2.1.3) Consequently, the project design is too activity-oriented.

Because of the weak construction of the project objectives and indicators, the whole 4-year project proposal and the subsequent revised annual proposal became *too activity-oriented*. There are no indications on how these activities are coherently connected to the project objectives that they have established beforehand. There are also certain activities such as the Educator's Training and the Educational Manual that have been mentioned in the 4-year proposal and the revised APL annual proposal that has not been achieved because it was either *de-emphasized or scrapped* all together in favor of other activities (e.g. mobilizations) in the last 4 years.

Recommendation:

It is highly recommended that APL-HK review its project design and try to address the identified design weaknesses such as defining the strategic objective of project, the specific objectives and the corresponding activities that will support the attainment of these specific objectives. Relevant indicators need to be developed to measure the attainment of the specific objectives. If done properly, the monitoring and evaluation of the immediate effects and impact of the project on the unionization of HSWs in Hong Kong will be more manageable and relevant.

2.2) Status of the Organizing Effort of the APL-HK

2.2.1) APL-HK Affiliates and Membership

From 2008 onwards, the APL has concentrated in establishing its foothold among the Filipino migrant workers community in Hong Kong, first by having itself recognized as an ‘association’ under Hong Kong laws and second, actively recruiting existing Filipino migrant associations to become its affiliate. And finally by aligning itself directly with the HKCTU through the affiliation of its 2 trade union affiliates to the HKCTU-led Federation of Asian Domestic Workers Union (FADWU).

The FADWU is the umbrella union of the HKCTU that covers not only Filipinos but all HK HSW associations of different nationalities especially from countries like Nepal, Indonesia, Thailand and Hong Kong locals. It is the main expression of the HKCTU’s efforts to assist and unionize both local and foreign migrant domestic workers in Hong Kong. The FADWU is a collaborative effort of the APL-HK, AMC and the HKCTU. The FADWU has 6 affiliates representing local Hong Kong domestic workers and 4 foreign nationalities namely: Thais, Nepalese, Indonesian and Filipinos. It has a total membership of 1,189 paid up members. Two of the 6 affiliates are unions of Filipino domestic workers or HSWs with a combined membership of only 70 workers. These two Filipino unions are likewise affiliated with APL-HK. These two unions may also be called as the APL-HK wing inside the FADWU-HKCTU.

Table 2: FADWU Membership as of December 2010

Union	Nationality	No. of Members
Filipino Domestic Workers Union (FDWU)	Filipino	20
Hong Kong Domestic Workers General Union	Local Hong Kong residents	750
Indonesian Migrant Workers Union	Indonesian	150
Overseas Domestic Workers Union (ODWU)	Filipino	50
Thai Migrant Workers Union	Thai	69
Union of Nepalese Domestic Workers in Hong Kong	Nepalese	150
Total		1,189

Source: HKCTU 2010

As of today, the APL-HK has 5 affiliates with an estimated worker base of 205. Membership of each of the local affiliate is constantly shifting primarily because of the transient nature of the employment arrangement of HSWs in Hong Kong and the number of reported dues-paying members. Not all of the 5 affiliates of APL-HK is an affiliate of FADWU simply because apart from the FDWU and the ODWU the rest of its affiliates are not legally recognized as unions under Hong Kong laws but are either interest based groups (e.g. dancing, karate) or regional aggrupation such as the VisMin.

Furthermore, it seems not all of the membership of FDWU and ODWU has been declared or registered with the FADWU because their membership in this federation is only 51% of what is reported in the APL-HK registry. The memberships of the 2 unions have been under-reported to the FADWU primarily because of the inability of the two unions to comply with the dues payment requirement of the FADWU which is about HK\$2 per month.

Table 3: APL-HK Present & Future Membership (December 2010)

Affiliate	Nature	Members (2009)	Present Members (2010)	Dues paying (2010)	Cumulative Recruitment Target 2011
Overseas Domestic Workers Union (ODWU)	Trade union (registered w/ HK labor office)	53	85	55	500
Filipino Domestic Workers Union (FDWU)	Trade union (registered w/ HK labor office)	50	52	28	250
Junior Dance Club*	Interest group for dance	-NA-	25	25	100
KAI AIDO Karate Ryu International	Self Defense School	18	23	23	-----**
VisMin Active Migrants' Association (VisMinAMWA)	Regional grouping	17	20	20	50
Total		138	205	151	890

Source: APL-HK 2010; APL Project Reports 2006-2009

*JDC—newest affiliate of APL-HK; joined only last August 2010.

**The KAI AIDO has no recruitment target because it failed to send a delegation to the last 2010 General Assembly.

Obviously, the membership of APL-HK is too small to become an influential player either within the FADWU-HKCTU or in the field of labor migration and employment. The APL-HK wing in FADWU is only 5.8% of the latter's total membership, while the overall membership of APL-HK is 0.017% of the estimated total population of Filipino HSWs in Hong Kong and 0.096% of the total number of foreign migrant workers in Hong Kong.

From the vantage point of trade unionism where bargaining strength is mainly based in the numbers and solidarity of membership, the present number of APL-HK's members is quite insignificant in the context of Hong Kong social policy making. That is why in the 2nd Annual General Assembly of the APL-HK held last December 5, 2010, Sis. Elizabeth Tang of the HKCTU challenged the APL-HK membership to recruit more aggressively among their Filipino compatriots to strengthen APL-HK. She pointed out the fact that the APL-HK's membership is "too tiny" to influence Hong Kong labor policy and it cannot remain that way for a very long time.

Consequently, the Assembly agreed to step up the recruitment and organizing efforts of the 5 affiliates with a total cumulative target of 890 members whose breakdown is likewise shown in Table 3. This cumulative target is more than 300% jump from a membership base of 205 which is a very ambitious target for a 12 months' worth of organizing effort. However, it is quite unclear during the Assembly how these figures were arrived at and what organizing strategy is going to be used by the AFL-HK both on a local and federation levels to achieve this target. There were no concrete proposals from the Assembly on how the APL-HK can achieve their fighting target of 890 for 2011 considering that the average membership growth rate between 2009 and 2010 is only about 48.5%.

But some of the major factors that contribute to the very slow organizing progress among the Filipino HSWs for the past 4 years may be attributed to several factors categorized under two major themes: Nature of Labor Situation of HSWs, Internal Organizational Dynamics and Strategy, Inter-Institutional Relation, Governance & Program Management.

1) Nature of the Labor Situation of HSWs
1.1) Broader Context of Domestic Work

Various social science literatures including APL reports and documents show that domestic work of the HSWs have been engendered by the so-called “double burden” phenomenon.⁴

In the absence of any social investment by governments to address the needs of the young and the elderly in receiving high-growth countries to enable men and women to cope with work and family life there is now a transfer of domestic responsibilities to other women who may be unpaid family members or low paid domestic workers.

In Hong Kong for example, this has become a global process such that the higher female labor force participation rate can only be maintained through the so-called “labor subsidy” of both local and migrant household service workers (HSWs) from low to medium growth countries like the Philippines. The main beneficiaries of this labor subsidy from foreign working class women are essentially middle and upper class women and their households in Hong Kong society (Heyzer & Wee 1994). This situation is facilitated and perpetuated by the labor policy of the sending countries and by the labor recruitment agencies and their recruitment network. This recruitment network extracts profit at every level from the families of the women who are pressured to migrate overseas to support family and household.

In other words the people who profit or benefit from the HSW’s labor are the labor traders or agents, governments, employers, other intermediaries, as well as the HSW’s own family and community, who often maximize their gains by exploiting her need to be employed. This social backdrop provides the impetus for the continuing diaspora of Filipino migrant workers to high growth societies like Hong Kong regardless of the working conditions that awaits them in these countries.

1.2) Dualistic & Restrictive HSW Labor Situation and its Impact on Trade Union Organizing

Filipino HSWs are part of the foreign work force in Hong Kong and consequently face similar problems like other foreign workers. These workers thus constitute a *transient* work force in Hong Kong, distinct and different from the local work force. This situation has led to some form of labor dualism in the workforce with relatively different policies applied to the local and foreign workers which more often than not is discriminatory to the latter in general (e.g. different wage rates and benefits for foreign and local domestic workers). These issues are many times subject to abuse by employers, even if domestic service is generally regulated. Working conditions vary from household to household depending on the prevailing views or attitude of the employer on the nature of paid domestic work. In some cases, the HSW is treated as a minor member of the household. In other cases, they may be treated solely as a paid employee.

In some cases paid domestic work is considered by some employers as some form of “paid slaves.” In the latter case, the probability or incidence of abuse is high that comes in the form of verbal or physical abuse, poor accommodation, insufficient or no food at all and poor treatment in general. For HSWs who live and work in the same place, the boundary between work and rest is unclear. Hence, they are on call by their employers 24 hours a day. One study indicated that in Hong Kong the most serious problem is accommodation where majority of foreign HSWs (70.4%) do not have their own room and are forced to share room with other members of the household or sleep in inappropriate areas like the dining room, kitchen or laundry area (Hayzer & Wee 1994).

The lack of common working conditions among Filipino and other foreign HSWs and the fact that they work in isolation from one another, makes it difficult for them to unionize. Therefore, attempts to solve certain problems are usually taken individually, rather than collectively. For example, the filing of

⁴ The situation of women who perform paid work outside the domestic sphere as well as homemaking and child-care work inside the home) among middle and upper class women in the receiving countries with relatively stable and increasing economic growth rates. Since domestic work is private and outside the cash economy, it is not remunerated and this causes it to appear as something less than real work and as part of the natural gender role of women (http://sociologyindex.com/double_burden.htm 2010)

complaints or legal cases by workers in the labor ministry is always done on an individual basis and not on a group basis as is the case in an industrial setting which makes this a taxing task for a union to perform.

Second, the long term stability of unions partly relies on long term employment of their members. But because of the transient nature of the foreign HSWs employment, the average residency of a member in a union is only around 2 years because the laws stipulates that a HSW employment contract is only for 2 years subject to possible renewal. Hence, unions of Filipino HSW's have a fast turn-over of leadership and members coinciding mostly with the formal ending of their employment contract.

An aggravating circumstance is that the employment relationship or balance of power in a domestic setting is inordinately tilted in favor of the employer. In this occupation there is only one worker for several employers, with conflicting demands on the time and attention of the worker. The low status attributed to the job and the servility inherent in it further weakens the bargaining position of the worker. To add to this, the inferior status of women as compared to men, the differences in social class and education and sometimes the racial or ethnic factor further tilts the balance of power towards the employer.

The legal environment in Hong Kong further strengthens the bargaining position of the employer because they are allowed to fire their workers without providing any evidence of neglect or contract violation on the part of the worker; while terminated workers are only allowed to stay in Hong Kong within 2-week time (known as the Two-Week Rule) or less, depending on the remaining time on their visa, which makes the possibility of reemployment more difficult.

Obviously all these will have a big impact on the amount of time and resources that unions like APL-HK will have to invest on continuing recruitment and training of new members and leaders to replace exiting ones on a regular basis but short periods of time. In fact, the APL experience will show that when they helped revived the FDHGU in 2005 it started out with only 45 members which eventually increased to 200 by early 2006. But before the end of 2006, the union membership was drastically reduced to 69 not only because of factionalism but was also due to member's terminations, end of contract and the migration of a number of members to a third country.

The second impact of fast turn-over of leadership and members is that the process of institutionalization for APL-HK will be difficult because its institutional memory will always be handicapped due to fast turn-over of people. The empowerment of an organization is highly correlated to its capacity to institutionalize itself. It must be noted that one of the factors for the institutionalization of any organization is its capacity to accumulate an institutional memory. As it transcends the individual, it requires the ongoing transmission of these memories which includes its organizational culture between members of this group either through verbal or written narratives. The latter narrative is even dependent upon the capacity of the APL-HK leadership and staff to systematically archive its organizational records for future reference.

This is one of the reasons why the AMC said that their role in the life of the APL-HK is to serve as some sort of "trainer-advisor" precisely because according to them "...unions composed of transient workers cannot establish a historical memory. They have to rely on organizations like the AMC who have longer historical memory compared to the unions."

Another characteristic of HSW's working conditions is the long working hours where HSWs are often deprived of any free time. This condition affects the ability of unions to perform its organizing functions such as meeting with HSWs. For example, as the 2006 APL report indicated, HSWs have very "limited free time." Most of the Filipino HSWs have "live-in" work arrangements and it is practically difficult to meet them even on an individual basis because they are expected to be on duty practically around the clock especially on weekdays. And if the organizer wishes to meet with HSW, the organizer will have to synchronize their meeting when the HSW has to perform duties outside of the household such as when buying something for the employer or when bringing the employer's dog for a walk.

Once a week however, HSWs normally enjoy a one day-off which is commonly on a Sunday and last for up to 14 hours from 7:00 am to 9:00 pm. This is the only time that they can attend to their personal

agenda, attend to the needs of their families back home, and meet with friends, etc. which compete with the union agenda. While the APL admitted having prior knowledge of this organizing limitation, its full impact on the project implementation was only realized on the second year of the LO-Norway project. Union seminars that were designed for a whole day for example, had to be shortened to half-day. Those that ran for more than 1 day had to be implemented in a staggered manner.

The APL report (2006) further observed that target numbers of participants are hard to meet, and sustaining their participation is even harder because of the abovementioned situation. Participants hardly have the time to complete union seminars. Thus it is not unusual that only $\frac{3}{4}$ or even half of the participants would actually complete the seminar. Follow up sessions with those who participated in trainings also proved to be very difficult. This problem affects the effectiveness of the project activities.”

2) Internal Organizational Dynamics of Filipino Unions

A major problem that affects union organizing among Filipino HSWs is the personality clashes between and among leaders and between leaders and members of various HSW organizations. APL (2006, 2008) reports indicated that the problem is so “incessant” that it has affected the organizing and strengthening of existing HSW organizations since 2005 starting with their attempt to revive the defunct FDHGU. In most cases, the APL observed that “these clashes had nothing to do with organizational issues,” but it disrupted the union’s operations which eventually lead to the emergence of destructive factions in organizations like the FDHGU. Managing and processing these personality issues took up a huge amount of time and energy of the APL’s sole organizer in Hong Kong. For an outsider or foreigner this could be quite difficult to understand.

This “incessant” organizational dynamics among and between Filipino leaders and followers is reflective of a typical Filipino organizational or political behavior and is partly rooted in what sociologists and psychologists would call Filipino psychology and social organization which is largely based on personal alliances and kinship structures. An intimate knowledge of this behavior for a trade union wishing to organize Filipinos in general would come a long way in making their efforts successful in the end (See Annex 2 for brief background on Filipino psychology & social organization).

In this context it is not surprising to hear an APL-HK organizer insistence on doing non-traditional trade union services like “rescuing” and “sheltering” of abused or terminated HSWs despite the fact there are already other Hong Kong based NGOs performing these kinds of services for distressed HSWs. She wanted to demonstrate to the HSW community that the APL can also be considered a “kin” from whom one can run to in times of need and in the process bolster the credibility of APL-HK not only as an impersonal union but as a fraternal or communitarian organization.

The Filipino personal alliance system would explain many Filipino behaviors in dyadic, multilateral, organizational and political relationships even their behavior in trade unions. While this kind of alliance system may be helpful in organizing Filipino HSWs in a foreign land like Hong Kong, it can also be tenuous primarily because Filipinos tend to gravitate around personalities who in the event of irresolvable personality conflicts could result in the demise of any form of organization such as a trade union. This could be the case of the FDHGU experience and has marked many trade union dynamics in the Philippines since the movement’s birth more than a hundred years ago. The APL-HK is not particularly immune to this kind of organizational phenomenon especially more so that the federation is still in its infancy stage.

Hence, it is imperative that APL-HK strengthen its union education program to inculcate the “kinship” based on working class solidarity. It is not enough to rely merely on mass mobilizations to inform and educate its constituency as these types of activities are fleeting and ephemeral. The APL-HK must invest time and effort in hurdling the challenges it is facing in its attempt to inculcate the ideology of working class solidarity in the trade union context.

This can be done if efforts are invested in the designing of a trade union education program that takes into consideration unique work arrangements of HSWs such as limited time-off or day-off, Filipino psychology and social organization, the average demographic profile of the APL-HK members and the like. One way of doing this is to craft a curriculum per course, develop a “catechism” for HSW

unionism that can come in the form of a pocket size primer or handbook to serve both as reading material for the member and as teaching aid in the hands of a competent union educator. In addition, the educator can be armed with a ready-made desktop flipchart containing visuals ala power point without the need for expensive LCD projector and laptop to complement the union handbook as teaching tool.

Obviously the main ingredient in the delivery of this education program is the development of a pool of accredited or pre-qualified union educators or cadres. These pools of union cadres will be drawn from each of the affiliates of the APL-HK and will be mainly responsible for the mass education of their respective members.

The delivery venue could be the creation of permanent study circles or cells composed of 6 to 11 members meeting regularly at least once a week for maybe 2-3 hours. The schedule of the meetings could be synchronized with the common time of all cell members. The study circles could serve both as a venue for education and for discussing social issues and other union matters. In other words, all members should be a part of a study circle or a cell with no exceptions as much as possible. In practical terms, this means organizing around 20 HSW cells or study circles led by 20 cell leaders or educators assuming a total membership of 200 for APL-HK.

Creating appropriate organizational traditions, rituals and symbols that emphasizes unity rather than the differences of members should also be factored into the maturation process of the APL-HK. This is a good time to introduce these kinds of practices when APL-HK is still in the infancy stage. Examples of these traditions and symbols are the use of rite of passage for new members, recognition activities for good membership behavior like complete attendance in meetings or regular payment of membership dues, use of rituals and symbolism during formal or public events like the singing of the national anthem and displaying the Philippine flag in addition to the APL flags, logo and APL anthem if any. Practices like these can enhance solidarity among HSWs not only as workers but also as Filipino citizens especially in a foreign land and de-emphasizes their differences like ethnicity, religion, etc. This is part of creating an organizational culture as a union with Filipino flavor. It is the total sum of the values, customs, traditions, and meanings that make the APL-HK unique. Organizational culture is often called "the character of an organization", since it embodies the vision of the organization.

The general idea of all these recommendations is to moderate the tendency of Filipinos to simply relate or organize along traditional Filipino personal alliance system and enhance their ability to rally behind working class solidarity, democratic self-governance and responsible citizenship.

Recommendations:

- *Incorporate and organize the cell system as described above in the organization of HSWs which will serve as its basic unit. The cell shall serve as venue for membership education, collection platform for dues & other membership contribution, organizational communication and mobilization of the APL-HK members.*
- *Leverage Information and Communication Technology (ICT) (e.g. use of cellphone, e-mails, e-groups in Yahoo, Gmail and/or FB) with the cell system to enhance communication and coordination in-between meetings of cells and the union's multifarious activities.*
- *Corollary to this is the development of a pool of union educators/cadres who will lead and manage these cells. These educators should be trained & accredited properly by the APL and should be monitored and guided regularly by a functional education committee.*
- *Serious attention must be given to the development of curriculum, TU handbook and other portable & non-electronic teaching aids for the use of both the educators and the general members.*
- *Institute traditions, rituals & symbols that enhances unity on three levels: as APL members, as part of the working class and as Filipino citizens*

3) Strategy, Inter-Institutional Relations, Governance & Program Management

The slowness of the organizing effort may also be attributed to factors related to issues of strategy, inter-institutional relations, governance and program management.

3.1) Roles, Functions & Inter-Institutional Relations of Stakeholders

The Hong Kong project provided an opportunity for APL and its two major partners, the AMC and the HKCTU, to work together to organize the Filipino HSWs in Hong Kong. The project is actually instrumental in synchronizing and synergizing the interests and roles of the three stakeholders.

3.1.1) The APL as the Direct Organizer

The APL for example is interested in making headway in organizing the Filipino migrant workers particularly the HSWs in Hong Kong. But the APL believes that it will need the help of other partners in order to succeed in organizing the Filipino HSWs. One of the main entry strategy employed by the APL to initiate the project was to work closely with its major partners, namely the NGO—Asian Migrant Center (AMC) and the HKCTU. Despite having around 15 years of union organizing experience up its sleeves, the APL lacks experience in organizing workers in a foreign country. The APL also recognizes that it lacks the necessary legal personality and resources to do direct organizing in Hong Kong. The APL is convinced that it has to rely on strategic allies like the AMC and the HKCTU to establish a beachhead in Hong Kong.

3.1.2) The AMC—NGO for Migrant Rights

On the other hand the AMC has been involved in organizing Filipino HSW unions since 2003 which at that time was the FMWU (Filipino Migrant Workers' Union). However, based on AMC's own admission, organizing trade unions is not part of their mandate nor do they have the core competence to do direct union organizing. Their sortie into union organizing since 2003 has diverted their attention from their principal role as a knowledge resource center for migrant workers in Asia not to mention the potential problem of being accused by other migrant workers groups from different nationalities of being biased in favor of Filipino HSWs. Hence the entry of the APL-LO-Norway into the migrant workers' scene in Hong Kong is a welcome development for AMC because of the willingness of the APL-LO-Norway through its Hong Kong project to do direct organizing among the Filipino workers and in supporting the organizational development requirements of the FDHGU.

In exchange the AMC committed to provide the initial institutional cover for the operation of the APL-HK project. This entails partly contributing to the salary of the sole APL organizer, provision of office space within the AMC premises, facilitating the organizer's working visa, provision of administrative assistance to providing contacts in the Filipino HSW community starting with the FDHGU. But more importantly, the AMC believes that its main role or contribution to this organizing enterprise is to serve as "trainer-advisor" to the APL. The AMC believe that this is more attuned to their primary mandate as a knowledge resource center and is also based on the belief they have a longer "historical memory" compared to the unions like APL-HK whose members are mostly "transient" workers in Hong Kong.

3.1.3) HKCTU—Trade Union Partner in Hong Kong

The HKCTU on the other hand is the only organization in the whole partnership arrangement that is organically Hong Kong Chinese. And like the APL it is also an apex trade union. It basically has the same interest as the APL in terms of attracting migrant workers to congregate under its umbrella. The only difference between the two is that, the HKCTU is interested in all types of migrant workers across nationalities including the local Hong Kong domestic workers. The HKCTU sees itself as the united voice of workers in Hong Kong which includes the foreign migrant workers. However, like the AMC it does not see itself as directly involving itself in organizing Filipino HSWs. It believes that this properly is the role of the APL and the workers themselves. But HKCTU is willing to provide "practical assistance such as talking to the police or helping the [HSWs] get a license to rally, and...in helping these HSWs formulate their policies with the Hong Kong government. And in between these are supports to trainings, meetings and education activities."

Despite the synergy afforded by the APL-HK project the relations between and among the three major partners has not been smooth all the time. Apparently, inter-institutional issues emerge on an intermittent basis between and among the entities which has affected the effectiveness and efficiency of the organizing work of the APL-HK. These issues or concerns basically revolved around administrative matters to differences of opinions with regards organizing strategy.

For example, the APL has become critical of the AMC because of its inability to hasten the facilitation of the working visa of APL's organizers and custody issues over financial documents like receipts which is badly needed by the APL in making the project reports to LO-Norway. Obviously delays in these matters have contributed in actual loss of person-days on the part of APL organizers and delays in the submission of project reports to the LO-Norway.

Furthermore, there seems to be a misunderstanding on who should directly supervise the work of the sole APL organizer in Hong Kong. The AMC felt that as "trainer-advisor" of APL-HK it is their responsibility to monitor or supervise the work of the organizer. This is all the more emphasized especially more so that she was originally holding office in AMC. The APL organizer is also technically a staff of the AMC according to them because they are partly shouldering her salary (this was before the LO-Norway support came in and was confirmed by Bro. Mata) and her working visa was facilitated by AMC as her "employer" since APL does not have the legal personality to do this. Consequently, the APL organizer has been doing some AMC related tasks other than organizing HSWs. In effect, the organizer is carrying a dual institutional personality, that of the AMC and as APL representative. This situation has caused some degree of confusion on the part of the organizer herself and to the HSW community at large.

3.1.4) The PMC—Mechanism for Communication, Coordination & Synergy

To address this problem and enhance the systematic coordination and exchange of communication among the major partners, they have agreed to create a Project Management Committee (PMC) to oversee the implementation of the APL-LO Norway project. The PMC is composed of APL-Philippines, AMC, HKCTU, LO-Norway and APL-HK, and this time the APL organizer is expected to report to this collegial body regarding the progress of her work. For the AMC and the HKCTU, this was a welcome move. For the AMC in particular, this was the reason why they are not intervening in the work of the APL because they expect that this will serve as a formal venue where directions and operational issues can be discussed more thoroughly and decisions taken in a collegial manner.

This time around however, another issue cropped up. The PMC seems to have degenerated into a management body that meets merely for "formality rather than a working one" according to Sis. Tang. a major reason for this is that the PMC was meeting only once a year and is highly dependent upon the visit of the APL General Secretary which is too far in between (although this is not entirely the fault of the Gen-Sec because the budget for his visits is only limited to one visitatorial inspection annually). Observed Tang, "APL main office...is very far and the responsible person can only come once in a while or a few times in a year to develop the plan and strategies for APL-HK. But then that person (referring to Bro. Josua Mata) goes back to the Philippines and has very little control over the implementation of the plans and strategies of APL-HK." Both the AMC and the HKCTU has a consensus that the PMC needs to meet more often, at least quarterly. Using technology to mediate the PMC meeting such as video conferencing seems to be difficult because of the busy schedule of the APL Gen-Sec according to Sis. Tang.

Consequently, the APL organizer has no one to report to in Hong Kong. She is left to her own devices. The AMC points to an observation that the APL has difficulty maintaining the various networks that they have provided to the APL to push for their agenda. The AMC said that this "...is an indication of [APL's] lack of strategy for their propaganda work." The AMC added, "[The organizer] is alone in the work and doesn't have anyone to confide or consult with. No one criticizes or checks her work." Sis. Tang on the other hand said that because of this situation, she and [the organizer] "...meet often bilaterally to discuss the operational problems of APL-HK."

Sis. Tang is of the opinion that the role of APL Philippines in running the Hong Kong programs should be lesser. To be effective, she feels that "...it is better that the organization which is based in Hong Kong should take up more of the responsibilities in terms of developing the organizing strategies and implementation of plans." Although Sis. Tang "...is aware that there may be conflict with LO-Norway

since Hong Kong is outside the funding framework, it will be less complicated in terms of monitoring. The weight of the responsibilities has to be shifted a little bit from APL Philippines to the PMC since APL Philippines is represented in the PMC anyway. The organizers should be accountable to the PMC and then strengthen the PMC by meeting more often until the organizers feel that they are standing on more solid ground.”

On the part of the APL, the evaluator gets the impression that the PMC has lost its relevance. They (Bros. Josua Mata, Edwin Bustillos, and Sis. Balotte Mirafuentes) felt that the direction for organizing the HSWs should come from the affiliates of the APL-HK and not from external partners of the APL. Besides they are quoted as saying that the LO-Norway fully agrees with this observation.

3.2) On the Question of Strategic Vision, Strategy and Project Performance

One of the more important issues confronting the APL-HK project is the question of vision and strategy. It answers the question of what is the most optimal way of reaching out to and organizing Filipino HSWs in Hong Kong. And where should all these organizing campaign will lead to? This strategy should be able to address the broader context of domestic or household work which essentially militates against organization and the weaknesses of the Filipino personal alliance system. From the interviews with the key informants, it seems the APL-HK has considered basically two strategies: a) to build up APL through individual recruitment; or b) through the recruitment of existing Filipino migrant organizations.

3.2.1) The AMC Perspective...

From the AMC’s perspective, this issue would be difficult to resolve unless APL-HK “resolves its identity issue.” The question: is APL-HK a union or a “social club?” For the AMC, it would be difficult for APL to function as a union because it is currently registered as a social club under Hong Kong laws. Thus its present strategy is to recruit any Filipino migrant organization regardless of whether they are unions (e.g. FDWU & ODWU) or not (e.g. JDC, Karate Club). But if the APL-HK would say that they would recruit individual members the AMC feared that this “might only duplicate the work of two existing union groups—the FDWU and the ODWU.” On the other hand if the APL will continue to be considered as “an association or a social club it will not be consistent with its mandate of being a trade union center.”

But for now, the AMC seems to concede that the emerging thrust of the APL is to position itself as “political trade union center” in Hong Kong. This means that the APL is transforming itself into an alliance of Filipino migrant organizations which includes all union and non-union organizations with a labor agenda.

The AMC also commented on the memorandum of agreement (MOA) between them and the APL. They felt that the content of the MOA is merely “procedural, focusing on how to set up the operations in Hong Kong with little strategic vision.” The AMC opined that the “question that needs to be answered is what really is the deeper strategic agenda of APL in Hong Kong? Do they want to simply unionize the Filipino HSWs in or do they want APL-HK to position itself as the center of gravity of migrant workers’ unionization in the Asian region, considering the amount of funds being used to sustain the project?”

After four years of implementing the APL-HK project, the AMC felt that the “progress is quite slow.” The AMC opined that Filipinos in Hong Kong are generally unorganized. The AMC indicated that “only about 40,000 Filipino workers, out of approximately 140,000 working in Hong Kong are members of organizations. All the funding of APL for this matter is only translated into a few domestic workers.” The AMC went on to say that “it is difficult to organize Filipino HSWs because they have become jaded or skeptical of large organizations. They would rather join smaller regional/ethnic groupings than join big political alliances.”

However, the AMC believes that if an organization is able to demonstrate leadership, HSWs will naturally gravitate around it. One way for APL to achieve this according to AMC is to have the ability to “give its stand on any labor issues that concerns migrant workers in Hong Kong.” For the AMC this is one of the fundamental roles of a political trade union alliance like APL-HK, to provide information and interpretation of issues so that the Filipino HSWs can be mobilized to act on the matter.

Unfortunately this is not always the case for APL-HK at present. The AMC cited as an example the inability of the APL-HK to respond to the issue of “passport renewal and the OWWA Exemption issue.” AMC commented that APL’s position on these matters must be clear not only to their affiliates but also to all their partners in Hong Kong. Once there is failure in leadership on the part of APL-HK, “the tendency of HSWs is to gravitate around the more aggressive groups such as the Migrante.”⁵

The AMC likewise commented on the non-traditional trade union services that are being initiated by APL-HK. This refers to the “rescuing” and “sheltering” service being provided by APL to vulnerable workers. The AMC felt that these kinds of services only help the individuals but it does not really change the basic “class power position” between the HSW and the employer. In this regard, they are recommending that the APL instead refer the concerned worker to other organizations whose core competence is to respond to this kind of need such as the Helpers for Domestic Helpers and the Christian Action and Pastoral Center.

Finally the AMC commented on the role of the HKCTU in organizing HSWs. They opined that the HKCTU has been very supportive of their efforts to organize migrant workers in Hong Kong especially Sis. Elizabeth Tang. They recognize her pioneering efforts to organize migrant workers. The AMC noted that the strengths of the HKCTU lies in the fact that it is an organization that is organically Hong Kong Chinese. They are very effective in propagating migrant issues among the locals and local trade unions and they have members in Hong Kong legislature. They are able to advise the AMC on how to engage the government when it comes to migrant concerns. In other words, the AMC and the HKCTU has been a long time ally in the struggle to promote and protect rights and welfare of migrant workers.

The AMC revealed that one of their collaborative projects with the HKCTU is the formation of the FADWU. They believe that they have been partly instrumental in the realization of this federation. However, the AMC sometimes observe that the HKCTU has a tendency to claim that they were the sole initiator in the formation of the FADWU when in fact it was the AMC who gave birth to the idea of that federation. They are looking forward to the day that the HKCTU would recognize that the FADWU was in fact a collaborative project of the HKCTU, the APL and the AMC.

3.2.2) The HKCTU Perspective...

The HKCTU on the other hand seem to be aware of the decision of the APL-HK to adopt the strategy of recruiting existing migrant organizations rather individual workers. But Sis.Tang had her doubts about the capacity of APL to pursue this strategy. Sis. Tang commented that the plan “sounded good.” “But when the plan was implemented, the APL organizer (referring to Sis. Balotte) faced a lot of problems. When she tried to talk to the leaders of the different organizations, there were a lot of relationship issues within the groups and between the groups, which hindered the successful implementation of the strategy.”

Consequently, this hindered the progress of project implementation. Sis. Tang recommended that the APL focus instead on developing the two trade unions under it—the FDWU and the ODWU. After all, the APL is a trade union itself whose main mission is to promote and defend labor rights. She seems to express reservation to the thrust of APL to recruit non-union organizations. When she compared the two unions to the other affiliates of the FADWU under the HKCTU, Sis. Tang felt that the other unions from other nationalities are more “stable in terms of commitment of the leaders and planning activities.” For instance, she confessed that “she was never aware that the FDWU has plans for their union. HKCTU have very little knowledge of the plans of FDWU because they don’t invite HKCTU to their meetings.” While the FDWU has been paying its dues religiously, Sis. Tang indicated that she “is not sure if the FDWU is a good union. Compared to the other unions, the FDWU is not too active in FADWU.”

Finally Sis. Tang commented on the role of the AMC in the organizing project of the APL. First of all she appreciated the contribution of the AMC in promoting the rights and welfare of HSWs . In fact according to her, the HKCTU has cooperated with the AMC because the latter has been doing direct organizing in the past with all HSWs across nationalities. But Sis. Tang commented that AMC is an NGO by nature and as such they are “more program-driven. Their mission is to finish all their

⁵ Migrante or International Alliance of Filipino Migrant Organizations is an extreme left militant alliance of migrant Filipinos.

programs in a year or a given period. But for the HKCTU program implementation is only one part of their concerns. The other is that they are also concerned about what happens when the program is accomplished.” For example, the AMC in general is more concerned with advocacies and campaigns such as the “campaign for Domestic Workers Convention.” For AMC the measurement of success is the number of attendees in a particular campaign activity. But for the HKCTU it is also important that these types of activities should be used to increase the membership of the concerned unions such as the APL-HK.

3.2.3) From the Perspective of the APL-HK Organizers

From the standpoint of Sis. Balotte and Shiella, they agree that there is need for APL-HK to be converted into a union instead of just remaining as a social club under Hong Kong laws. The two even agreed that the direction that the APL must take is towards “1-industry union.” And they quickly added that this direction is only known to the two of them and that the AMC or the HKCTU is not aware of this strategic direction. They also agreed that the implication of this move is that the APL-HK including all of its non-union affiliates will have to change its name to reflect the word “union.” Or there may be a need for all or some of the APL affiliates to merge into one union. They are however unsure on how to proceed towards this direction and they are even unsure on how long this is going to take.

The two organizers also revealed that the present constitution and by-laws of the APL-HK has not been discussed widely by the membership because it was only crafted quickly just to meet the registration requirement of the APL-HK under Hong Kong laws. The interim officers reflected in the registration papers of APL-HK are as follows: Sis. Elizabeth Tang (President), Bro. Josua Mata (Vice-President), Sisters Gigi Flores and Dominique Mueller (of the ITUC-GUFs Hong Kong Liaison Office). And this interim board is aware that the APL-HK will have to elect a new and regular set of officers for APL-HK which actually happened during its last General Assembly on December 5, 2010.

During the interview, it seems that the APL-HK as a whole or some of its affiliates are members of several layers and networks of alliances and union. On the union side, two of APL’s affiliates (FDWU & ODWU) are members of the FADWU-HKCTU. The APL-HK could not affiliate directly to the HKCTU because of its non-union status. These unions are likewise members of the AMC initiated CMR or Coalition for Migrant Rights. The CMR in turn is a member of the ADWA or Asian Domestic Workers’ Alliance which is part of the broader Migrant Forum in Asia (MFA).

Recommendations:

- First of all there is an urgent need for APL to define the strategic thrusts of the Center in the field of migrant labor. These should include a defining who are the strategic partners of the APL in this enterprise and what their roles and functions in the whole scheme of things. It is essential that APL together with the partners such as the LO-Norway, AMC and the HKCTU to sit down together to thresh out these matters. After all, it is these entities that have supported the APL in its work in Hong Kong
- Next define the organizing strategy that will be required to organize the HSWs. If it means transforming the APL-HK into a “1-industry union” what does this mean? What will it take to convert APL-HK into a union? What steps are to be taken to make this a reality within a concrete and reasonable timeframe? In this scenario, what will be its legal and political implication vis-à-vis the FADWU-HKCTU and APL Philippines? All these strategic questions need to be answered soonest and should not be left to the sole discretion of the of the APL organizing team.
- Once the above concerns are settled, there is a need to determine once and for all if there is a need for an oversight body like the PMC in the management of the APL-HK-LO-Norway project. Is it still relevant and useful for all parties concerned especially for the APL staff and the affiliates of the APL-HK? If yes, who should compose this PMC and what are their roles and functions both as individual stakeholders and as a collegial body? There is also a need to establish better operating policies, systems and procedures for a more effective and efficient operation of the PMC which would include a more regular and frequent interaction among its member-stakeholders and not highly dependent upon the physical presence of APL General Secretary. If no, then what

supervisory body or mechanism should be created to guide the organizing work of the APL organizing team in Hong Kong on a more regular and substantial basis. If the PMC will be retained or whatever analogous supervisory mechanism that shall be created it is essential that the necessary budget is allocated to make this a reality.

- Finally, the relationship between the PMC or any supervisory mechanism and the present local leadership or governing board of the APL-HK must be clearly defined to avoid any overlap in roles and functions.
- Corollary to this, there may be a need for the affiliates of the APL-HK together with APL Philippines and the PMC to re-examine the constitution and by-laws of the APL-HK so that it will be consonance with its true nature (whether it's a union or a "political labor alliance").

3.3) Program Management: Observations and Issues Regarding APL-HK Staffing

One major aspect of program management has something to do with the staffing of a project. There is a need to answer the question of whether the number of project staff is adequate for the project and that they have the necessary qualification and competence to perform the job required of them in the context of Hong Kong. And is the present personnel policy especially those related to working condition adequate enough to prevent if not minimize future misunderstanding between APL the employer and its employees in Hong Kong.

At the start of the project in 2006, the APL was only able to deploy a 1 person organizing team (Sis. Gigi Flores) in Hong Kong but later on it would take its toll on the morale of that single staff which also had an effect on the success rate of the APL in organizing HSWs in Hong Kong. There was an attempt to address this gap on the part of APL Philippines in 2006 by adding an additional staff, Sis. Balotte Mirafuentes. However because of the delays in visa application and processing of Sis. Balotte it was only in 2008 that she was fully deployed in Hong Kong. But by that time the first organizer, Sis. Gigi already resigned from the APL. So APL ended up again with 1 staff. But by December 2010, the APL again added an additional staff in the person of Sis. Shiella Estrada. Sis. Shiella is the current president of the ODWU and was also recently elected as the president of the APL-HK in its last General Assembly, last December 2010.

This segment of the paper will review the capacity and working arrangement of the Sis. Balotte and the implications of hiring Sis. Shiella as an APL staff in Hong Kong. The succeeding paragraphs are the consensus among the major partners of APL-HK:

First, there is a consensus among the major partners or stakeholders that working in a foreign country is relatively difficult for obvious reasons especially if one is going to perform the function of an organizer. And it will take some time before the person gets adjusted to the milieu of the host country which in this case is Hong Kong.

Second, there is also a consensus that the job of organizing HSWs is too large for one person to perform regardless of how skilled or experienced person is.

Third, organizing people is also a job that requires some degree of emotional maturity, psychological focus and different sets of skills such as human relations skills, training skills, writing skills, public speaking skills, advocacy skills and the like. Hence, it is very difficult to find all these skills in just one person. For the AMC for example, organizing HSWs in Hong Kong would require a team of three persons to attain the project objectives effectively and efficiently. That team should be composed of the following specialists: community or union organizing and organizational development specialists, policy and public relation specialist and a specialist in administrative work & other general services. It is essential according to the AMC that the teams do not "duplicate" but rather "complement" each other's skill set.

Below are the specific comments and observations of the major stakeholders on the individual APL-HK staff at present:

3.3.1) Sis. Balotte Mirafuentes: The Exported Organizer

A. AMC on Sis. Balotte

The AMC believes that any staff should not be left working alone for long periods of time. Balotte should be part of a team and that team should be reporting to an oversight body on a more regular basis. The AMC also commented that the strength of Balotte lies in her organizing experience in the Philippines. However, "...her administrative skills is not too developed that is why we still assist her when it comes to paper works such as applying for permits whenever they have activities such as rallies and demonstrations. Propaganda skills are also lacking."

B. HKCTU on Sis. Balotte

On the other hand, Sis. Tang observes "...that until today Balotte has not gained the kind of confidence needed to do the work well as an organizer." "...she has to listen to a lot of people...Balotte has too many bosses: the AMC and APL Philippines." Sis. Tang believes that Balotte needs to have a support of an additional staff. That is why when she learned that Sis. Shiella has joined the APL as a staff she has observed some improvement with Balotte's performance.

3.3.2) Sis. Shiella Estrada: The Union Leader Turned Organizer

Sis. Shiella Estrada has recently been hired by APL Philippines upon the recommendation of Sis. Balotte Mirafuentes. The basis for the hiring is that Sis. Shiella is an experienced organizer and leader of HSWs given her more than a decade long experience as a domestic worker in Hong Kong. As mentioned earlier she is the current president of ODWU and was recently elected president of APL-HK. Shiella is also presently a full time domestic worker in Hong Kong with a valid domestic worker visa. At the time of the interview, no one is aware that Shiella has been hired as a full time APL staff except for Balotte, APL Philippines and Sis. Tang.

With this background, the AMC commented that if ever Shiella will be hired the role she's going to take is not yet clear to them. According to them, this is a "systemic issue" that needs to be addressed by APL Philippines. There is a need to define the "division of labor" between Balotte and Shiella within the APL-HK framework. To address this partially, the evaluator requested both of them to submit how they propose to divide the job of organizing workers which is attached to this report as Annex 3.

This question is related to the *issue of complementation of skills*. Considering that Balotte and Shiella have almost the same skill set, the issue of complementation has not been fully addressed. Therefore there is an urgent need to define the division of labor between the two not only to avoid duplication but likewise identify squarely what tasks or components under the APL-HK-LO-Norway project that cannot be delivered competently by anyone of them at the moment. If this is the case, there may be a need to farm out or sub-contract these potentially unattended tasks to a third party or partner for appropriate action such as for example the development of curriculum, education materials and training of educators and policy analysis and write up. Apart from these questions, the AMC and the evaluator raised some potential issues that might crop up with Shiella as a hired APL staff:

First, there is the *legal issue* of the nature her working visa. Currently Shiella's visa is that of a domestic worker. Part of the conditionality attached to her visa is that she is not allowed to have a part time job. Another is that under Hong Kong laws a domestic worker is not allowed to change the nature of her job unilaterally.

Second, there is the *issue of remuneration*. The AMC questioned whether Shiella will continue receiving a domestic worker's salary rate or the salary rate of an APL organizer? For them this might be a potential issue that needs to be addressed in case Shiella is hired. However, based on interviews with the staff, the evaluator established that Shiella will be receiving the same rate at Balotte's salary rate. The question that needs to be answered at this point is this: should Shiella be receiving the same rate as Balotte's rate without considering the issue of seniority, experience and skills? Furthermore, should the function of supervision and administration be given an additional consideration in the

determination of salary rate? If yes, this will have to be considered in the determination of the rate of whoever will be designated as the “team leader.” Finally, since at present Shiella is concurrently working as a FULL TIME domestic worker shouldn’t this also be considered in the determination of her salary rate? The decision of APL Philippines on this matter is highly important because an erroneous decision at this level might create unnecessary personnel complication in the future of the project and in the relation of ODWU and APL-HK.

Third, there are several ethical issues that need to be addressed by APL-HK and APL Philippines related to the employment of Shiella:

- A) Issue of double compensation: This issue is also related to the fact that she is now considered as a full time employee both as a domestic worker and as an APL staff. This is an ethical issue that needs to be addressed squarely. We cannot allow this situation to carry on. Obviously it is unfair to all concerned. It is unfair to Shiella’s employer and it is likewise unfair to APL-HK as an employer. It is also unfair to Balotte who is working full time for APL-HK.
- B) Issue of transparency: based on interviews it is apparent that except for APL-HK, APL Philippines, and Sis. Tang, no one is aware that Shiella is already hired as an APL staff. This is something that needs to be threshed out by APL soonest. Again this cannot be allowed to continue for long. Partners and members will have to be informed of this development. This can create a potential legal and political problem for APL-HK in the long run if not addressed head on.
- C) Issue of political role and relations: Internally (confidentially) Shiella is already an APL staff accountable to APL-HK and APL Philippines. And theoretically she can be hired and fired based on factors of performance and confidence. Publicly however, she is also functioning as a political leader duly elected by her members to be president of ODWU and APL-HK as such she is also accountable to her members as an elected official. Obviously there is a conflict of interest situation in this arrangement. The sooner that APL addresses this, the better for everyone concerned.

Obviously these issues are not mutually exclusive. These concerns and issues can interact and mutually enforce one another to create a potential problem for APL-HK.

Recommendations:

- Define clearly the division of labor between the two Hong Kong organizer of APL to enhance their complementation and synergy.
- Identify clearly which among the major tasks and components of the projects that cannot be handled competently by any of the two APL staff and explore the possibility of sub-contracting the job to any of the partners of APL whether in Hong Kong or in the Philippines.
- Define the compensation package (both salary & benefits) for the two organizers taking into consideration their qualification, experience, and job responsibilities.
- Address as soon as possible all potential issues surrounding the employment of Sis. Shiella as an APL staff to avoid future complications for APL-HK.

3.4) Program Management: Issues of Financial Efficiency and Sustainability

Efficiency is defined here as the extent to which the project or program has *converted or is expected to convert its resources/inputs (funds, expertise, time, etc.) economically into results in order to achieve the maximum possible outputs, outcomes & impacts with minimum possible inputs*. Or put another way, it has something to do with being cost-effective. Cost-effective in this sense means *“changing lives as much as possible for as little money as possible”*

**Table 4: Average LO-Norway Investment per APL-HK Member per Year
(In HK\$)**

	2006	2007	2008	2009	Average
No. Members	69	37	NA	202	77
Dues-paying	NA	13*	NA	NA	NA
LO Grant (HK\$ rounded off)	460,664	511,270	680,764	608,081	565,195
Average Investment per Member (rounded off)	6,676	13,818	NA	3,010	5,876
Average Investment per dues paying Member	NA	1,063	NA	NA	

*Estimated based on APL membership report for 2007

Source: Various APL annual project reports 2006-2009

From a purely financial efficiency perspective, data shows that the APL-HK only manages to reach or serve 77 HSW-members yearly with LO-Norway investing around HK\$5,876 per APL-HK member on an annual basis (see Table 4). This is approximately P32,906 per member in Philippine peso. If this will be compared with the average LO-Norway investment per member in its Philippine project which was evaluated last year, the ratio is about P335 per member⁶ and APL-HK membership size at present is only equivalent to one local union of APL Philippines. Some people might say this is unfair comparison considering that we are talking of Hong Kong and the Philippines. However, in the absence of data of similarly situated project we have no choice but to compare it with the Philippine operation of the APL that is essentially doing the same thing—organizing workers into unions and associations coupled with a large dose of advocacy work.

Now whether this is a wise use of resources considering that there are other important developmental investment areas that can be considered in the Philippines is something that needs to be assessed carefully by the APL leadership in Manila. The answer to this question will essentially depend on the APL's appreciation of the strategic value of investing in migrant labor in general and in migrant labor in Hong Kong in particular. As their AMC partner would say, APL needs to define its strategic vision for migrant labor not only in Hong Kong but also in the whole Asian region as well. And even if investing in migrant labor is strategic direction to take, is APL in a position to push this strategy forward to its successful conclusion given its present competence, resources (time, money, staffing), organizational mechanism and strategy being employed? Are there other ways of doing unionism among HSWs in Hong Kong other than what is being employed today?

One of the things that could justify the long term investment in Hong Kong's Filipino HSW is their capacity for sustaining their unionization beyond the LO-Norway project support. Currently the APL-HK is levying monthly union dues of around HK\$4 per month per member. However, it seems the union levy is too small to even support the monthly average core expense of APL-HK (See Table 5). And unfortunately, in the determination of the appropriate membership dues these core expenses were never considered in the past deliberation on this matter. The dues rate established was quite arbitrary on the part of the membership and leadership of APL-HK.

Core expense refers to those expenses directly related to APL-HK overhead minus personnel and direct program expenses. These expenses are as follows:

⁶ The average annual expenditure of APL Philippines is around P13,700,000 with a membership base of 40,840 workers.

Table 5: APL-HK Core Expense, Membership & Required Dues

Office Maintenance Expense			Estimated Monthly Dues Required (HK\$)		
Year	Annual (HK\$)	Monthly (HK\$)	No. of Present Members	2011 Cumulative Membership Target	Cumulative Membership Growth Rate Target 50%
			205	890	308
2006	96,080	8,007			
2007	78,828	6,569			
2008	38,993	3,249			
2009	51,992	4,333			
Total	265,893	22,158			
Average	66,473	5,539	27	6	18

Assuming that APL-HK will be able to improve its dues collection system and increase its collection rate to 90% at least, that would mean a monthly revenue of around HK\$185 per month. However despite the improved collection rate, it would not be enough to even support the average monthly core expenses of the APL-HK of around HK\$5,539.

The table above shows three different membership scenarios and its effect on the monthly dues based on average core expense of HK\$5,539. The first scenario presents the current membership of APL-HK wherein the dues should be around HK\$27. The second scenario shows the latest fighting target of APL-HK based on the last agreement of their last General Assembly. If this figure is realistically attainable then this means that APL-HK can impose a dues rate of around HK\$6 per member. The last scenario assumes that the 2011 fighting target is not attainable. And that the most likely outcome of the organizing effort of APL-HK would not exceed 50% based on its four year growth rate experience. If this is the most likely scenario then the dues rate should be around HK\$18 per member or we could round it off to HK\$20 because APL-HK still has to pay its obligation of membership levy to APL-Philippines which is the ultimate mother organization of APL-HK. Unfortunately, the evaluator was not able to establish whether or not a monthly dues of HK\$20 is affordable given the present minimum wage of around HK\$3,580 for foreign domestic worker in Hong Kong. However, it is the considered opinion of the evaluator that the amount is quite affordable. As proposed earlier, this amount could be collected monthly (or by installment through weekly collections) through the cell system if the cell will be established and allowed to function well by the members themselves.

In the discussion with the APL-HK staff, the evaluator broached the idea of creating an APL-HK Solidarity Fund. This will be a form of a restricted reserve fund whose sources will be the collected membership dues (except the dues payable to APL-Philippines) and service fees. This fund could be invested in safe investment instruments to allow the funds to grow until it becomes a sort of “endowment fund” for APL-HK. The assumption behind the success of this scheme is that the LO-Norway will continue to support the project for few more years and that the dues will be collected diligently through the cell system.

Recommendations:

- Define and enact a realistic dues structure and service fees for specific services such as seminars, legal service, sheltering and the like taking into consideration the APL-HK core expenses.
- Set up a good dues collection system which is integrated into a cell system as the basic unit of APL-HK.
- Explore and if feasible, set up an APL-HK Solidarity Fund as an endowment fund to finance some portions of the APL-HK operation in the future.

Annex 1: Brief Background of the APL-HK Program

The *APL-HK* project is being implemented since 2006 through the collaborative initiative of the Alliance for Progressive Labor (APL) and the Norwegian Confederation of Trade Unions (LO-Norway) with the support of the Asian Migrant Center (AMC)⁷ and the Hong Kong Confederation of Trade Unions (HKCTU)⁸. According to APL project documents, the main focus of this project is to strengthen and expand APL's union organizing campaign among Filipino domestic workers in Hong Kong. In particular, the project aims to achieve the following specific objectives in a span of 4 years from 2006 to 2009:

7. To consolidate and expand the Filipino domestic worker's federation in Hong Kong;
8. To build the organizational capacity of the Filipino domestic worker's federation in Hong Kong;
9. To develop the migrant worker's union's education program, including curriculum, education materials and the like;
10. To deepen APL's integration with the Filipino domestic worker's federation in Hong Kong;
11. To strengthen linkages between the APL, HKCTU, and migrant NGOs, especially in terms of coordinating its efforts in fighting for migrant workers' rights; and,
12. To develop APL's capacity to advocate migrant worker's rights.

Project Activities:

The abovementioned objectives are expected to be attained through the implementation of the following activities:

1. Held 3 fora in the Philippines and Hong Kong every year for a total of twenty-four (24) fora;
2. Held a total of thirty-six (36) Basic Trade Union seminars implemented in increasing numbers: six (6) for the first year and two (2) additional seminars every year thereafter;
3. Conducted a total of twenty-two (22) Courses on Social Movement Unionism: four (4) on the first year and six (6) courses every year thereafter;
4. Held ten (10) leadership trainings implemented in increasing numbers: one (1) for the first year, two (2) for the second, three (3) for the third and four (4) for the last year;
5. Conducted three (3) annual educator's training;
6. Conducted a total of ten (10) political education trainings implemented in increasing numbers: one (1) for the first year, two (2) for the second, three (3) for the third and four (4) for the last year;
7. Held a total of eighteen (18) Gender Development Trainings: two (2) for the first year, four (4) for the second, and six (6) every year thereafter;
8. Produced a total of forty-two (42) issues of monthly newsletter on migrant worker's activities and concerns: six (6) issues on the first year and twelve (12) every years thereafter;
9. Conducted two (2) leadership exchange visits every year for a total of eight (8) visits; and,
10. Conducted four (4) annual Project Management Committee meetings.

However, in the succeeding amended project proposals to the LON, many of these targets were adjusted and re-adjusted in the next four years.

Budget Requirement:

⁷ Asian Migrant Center— The AMC is a Hong Kong based Asian regional NGO specializing in knowledge—oriented services related to Asian labor migration such as information exchange, research & monitoring. It is also involved in a region wide advocacy in behalf of migrant labor either on its own or in coordination with local or Asian wide networks and coalitions.

⁸ Hong Kong Confederation of Trade Unions-- The HKCTU is a pro-democracy labor and political group in the Hong Kong. It was established in 1990 and has around 160,000 members in 61 affiliates (mainly trade unions in various sectors which include foreign migrant workers in Hong Kong).

The original four-year project requested for a grant support of US\$ 270,700.00 from LO Norway. The APL on the other hand, was expected to generate around US\$ 9,840.00 as its counterpart funding. The combined funding for the project is US\$280,540.00.

Annex 2: Notes on Filipino Psychology & Social Organization as Context of “Incessant” Personal and Organizational Dynamics of Filipino Migrant Organizations in Hong Kong

Filipino social organization generally follows a single pattern, although variations do occur, reflecting the influence of local traditions. Among lowland Christian Filipinos, social organization continues to be marked primarily by personal alliance systems, that is, groupings composed of kin (real, ritual, communitarian, or organizational), grantors and recipients of favors, friends, and partners in commercial or non-commercial exchanges (See Annex 2 for brief background on Filipino psychology and social organization).

Philippine personal alliance systems are anchored by kinship, beginning with the nuclear family. A Filipino's loyalty goes first to the immediate family; identity is deeply embedded in the web of kinship. It is normative that one owes support, loyalty, and trust to one's close kin and, because kinship is structured bilaterally with affinal as well as consanguineal relatives, one's kin can include quite a large number of people. Still, beyond the nuclear family, Filipinos do not assume the same degree of support, loyalty, and trust that they assume for immediate family members for whom loyalty is nothing less than a social imperative. With respect to kin beyond this nuclear family, closeness in relationship depends very much on physical proximity where friendship is cultivated and developed.

Other forms of fraternal bonding are established by 1) kinship based on ritual (sealed on any of three ceremonial occasions—baptism, confirmation, and marriage); 2) kinship based on communitarian or ethnic origin (as in belonging to one community, province or region usually marked by the use of common language); 3) kinship based on organizational affiliations such as Greek lettered organizations and other similar brotherhoods/sisterhoods. These mutual kinship systems, is the primary method of extending the group from which one can expect help in the way of assistance or favors, such as jobs, loans, referrals, protection, or just simple gifts on special occasions.

These different types of kinship are commonly guided by core Filipino values like *utang na loob* (reciprocity based on debt of gratitude) and *pakikisama*—a Filipino attitude primarily guided by conformity with the majority.

These different kinship bonds are not mutually exclusive. They are interrelated components of the Filipino's personal alliance system. Thus two individuals may be distant cousins, become friends, and then cement their friendship through god parenthood. Each of their social networks will typically include kin (near and far, affinal and consanguineal), ritual kin, one or two patron-client relationships, one or more other close friends based on ethnicity or high school club (and a larger number of social friends or networks), and a dozen or more market-exchange partners. *Utang na loob* and *pakikisama* may infuse any or all of these relationships. One's network of social allies may include some eighty or more people, integrated and interwoven into a personal alliance system.

Source: <http://countrystudies.us/philippines/41.htm> (accessed Jan. 28, 11)

**Annex 3: Proposed Division of Labor Between Sis. Luella Mirafuentes and Shiella Estrada
(December 2010)**

Key Performance Areas	Estrada	Mirafuentes
I. Organizing/ Expansion	Primary Task	Support
• Contact Building	✓	✓
• Visit/Consultation	✓	✓
• Core group formation	✓	✓
• Conduct of BOS	✓	✓
• Submission of Documents for Affiliation	✓	✓
• Processing	✓	✓
II. Maintenance	Primary Task	Support
• CBL review/discussion/amendments	✓	✓
• Submission to the society	✓	✓
• EC Regular Meeting	✓	✓
• Regular Committee Meeting	✓	
✓ Organizing		✓
✓ Education/Grievance		✓
✓ Campaign/Advocacy/Mobilization		✓
✓ Socio- cultural	✓	
III. Education	Support	Primary Task
• TNA		✓
• Identification of Training/WS/FGD/RTD		✓
• Module Preparation		✓
• Identification of Participants		
• Preliminary Activities	✓	✓
✓ Scheduling		
✓ Venue prep		
✓ Repro of Materials		
• Actual Conduct	✓	✓
• Evaluation/Assessment	✓	✓
IV. Campaign/Advocacy/Legislation/Mobilization (with assistance of Bro. Edwin Bustillos)	Support	Primary Task
• Campaign Planning	✓	✓
• Conduct of Forum/symposium	✓	✓
• Publication/Media Exposure/	✓	✓
V. Networking/Linkaging	Support	Primary Task
• Identify contacts and possible partners	✓	✓
• Consultation and visits	✓	✓
• Identify possible collaboration with other service providers	✓	✓
Social Organizations/CMR/ADWA/HAB	Primary Task	
• Isabela Federation		
• PASSI City Alumni Association		
• League of Visayas Federation		
• Mindanao Federation		
• The United City of San Fernando Organization		
• Leyte Achievers		
• Agusan HK Association		
Service Institutions/FADWU		Primary Task
• Helpers for Domestic Helpers		

<ul style="list-style-type: none"> • Diocesan Pastoral Center for Filipinos • Christian Action • Asian Center of Progress of the People • Asian Migrants Centre • HKCTU • Equal Opportunities Commission • Royal Victory International 		
VI. Direct Services	Support	Primary Task
• Rescue/Police/Hospital (assistance)	✓	✓
• Filing of complaint (labor dept, Phil Consulate, etc.)	✓	✓
• Assistance during court hearings/mediation (Labor Dept., MECAB, Phil Consulate & Labor Tribunal)	✓	✓
• Counselling (Phone calls/Actual)	✓	✓
VII. Administrative	Support	Primary task
• Planning/Evaluation	✓	✓
• Reports prep & submission	✓	✓
• Consolidation		✓
• Regular staff meeting(every 1st Wed of the month)	✓	✓

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