

EASE OF DOING BUSINESS SUMMIT 2014

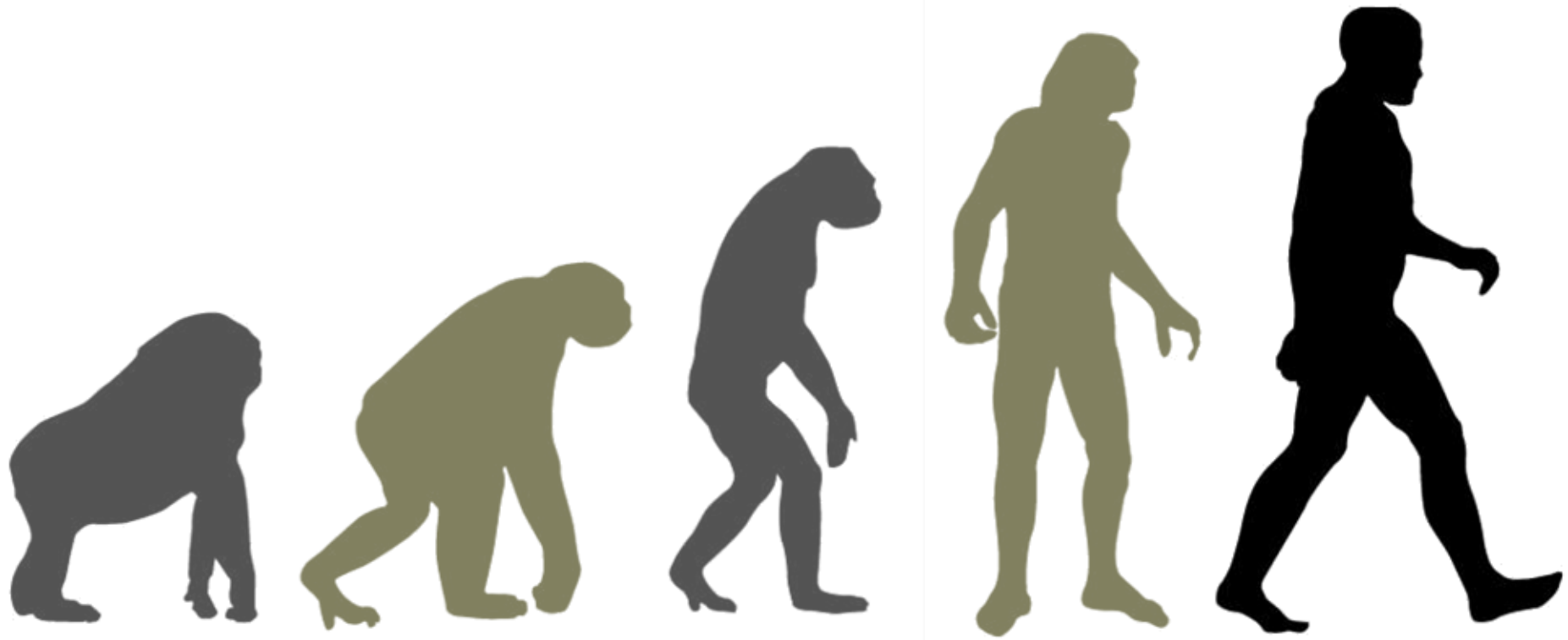
28 May 2014
Hotel Intercontinental, Makati City



THE DOING BUSINESS GAMEPLAN 2.0

28 May 2014
Hotel Intercontinental, Makati City





evolution



GLOBAL COMPETITIVENESS REPORT CARD

REPORT	2014 RANK	2013 RANK	2012 RANK	2011 RANK	CHANGE	ASEAN RANK	NEXT RELEASE	TARGET
1. WEF Global Competitiveness Index		59/148	65/144	75/142	↑ 6	6 of 10	Sep-14	49
2. WB-IFC -Ease of Doing Business		108/189	138/185	136/183	↑ 30	6 of 10	Oct-14	63
3. IMD World Competitiveness Report	42/60	38/60	43/59	41/59	↓ 4	5 of 5	May-15	20
4. TI Corruption Perception Index		94/177	105/176	129/183	↑ 11	4 of 10	Dec-14	60
5. HF-Economic Freedom Index	89/178	97/177	107/179	115/179	↑ 8	5 of 9	Jan-15	59
6. WEF-Global Information Technology Report	78/148	86/144	86/142	86/138	↑ 8	6 of 10	Apr 15	49
7. WEF-Travel and Tourism Report		82/140	n/a	94/139	↑ 12	7 of 8	Mar-15	46
8. WIPO-Global Innovation Index		90/142	95/141	91/125	↑ 5	7 of 8	Jul-14	47
9. WB-Logistics Performance Index	57/160	n/a	52/155	n/a	↓ 5	6 of 9	Mar-16	53
10. FFP-Failed States Index		59/178	56/177	50/177	↑ 3	7 of 10	Jun-14	118
11. WEF-Global Enabling Trade Index	64/138	n/a	72/132	n/a	↑ 8	6 of 10	Mar-15	46
12. WEF-Global Gender Gap Report		5/136	8/135	8/135	↑ 3	1 of 9	Oct-14	--

***As of May 2014

GLOBAL COMPETITIVENESS PERFORMANCE

REPORT	LATEST CHANGE (As of May 2014)	CHANGE OVER 3 YEARS
1. World Economic Forum Global Competitiveness Index	+ 6	+ 26
2. IFC/WB Ease of Doing Business Report	+ 30	+ 28
3. IMD World Competitiveness Report	-4	-1
4. Transparency International Corruption Perceptions Index	+11	+40
5. Heritage Foundation Economic Freedom Index *	+8	+26
6. WEF- Global IT Report *	+8	+8
7. WEF- Travel and Tourism Report	+12	+12
8. World Intellectual Property Organization Global Innovation Index	+5	+17



JULY 2012

NCC crafts
Gameplan for
Competitive
-ness

1



DECEMBER 2012

Videoconferences
with IFC
Washington

3



JANUARY 2013

Meeting with PH
Embassy in
Washington



5

MARCH 2013

Target
validation
workshops

6

MAY 2013

President Aquino
signs Administrative
Order No. 38
creating an inter-
agency Ease of
Doing
Business
Task
Force



8



**JULY 2013
OCTOBER 2013**

Task Force
convenes

10



**SEPTEMBER
2012**

Economic
Development
Cluster approves
Gameplan

2



**DECEMBER 2012
FEBRUARY 2013**

Public-Private
Dialogues

4



MAY 2013

Work teams commit
to implement
targets at
Ease of
Doing
Business
Summit

7



JUNE 2013

Submitted
reform
inventory
to IFC

9

**OCTOBER
2013**

Release of
2014 Doing
Business
Report

11

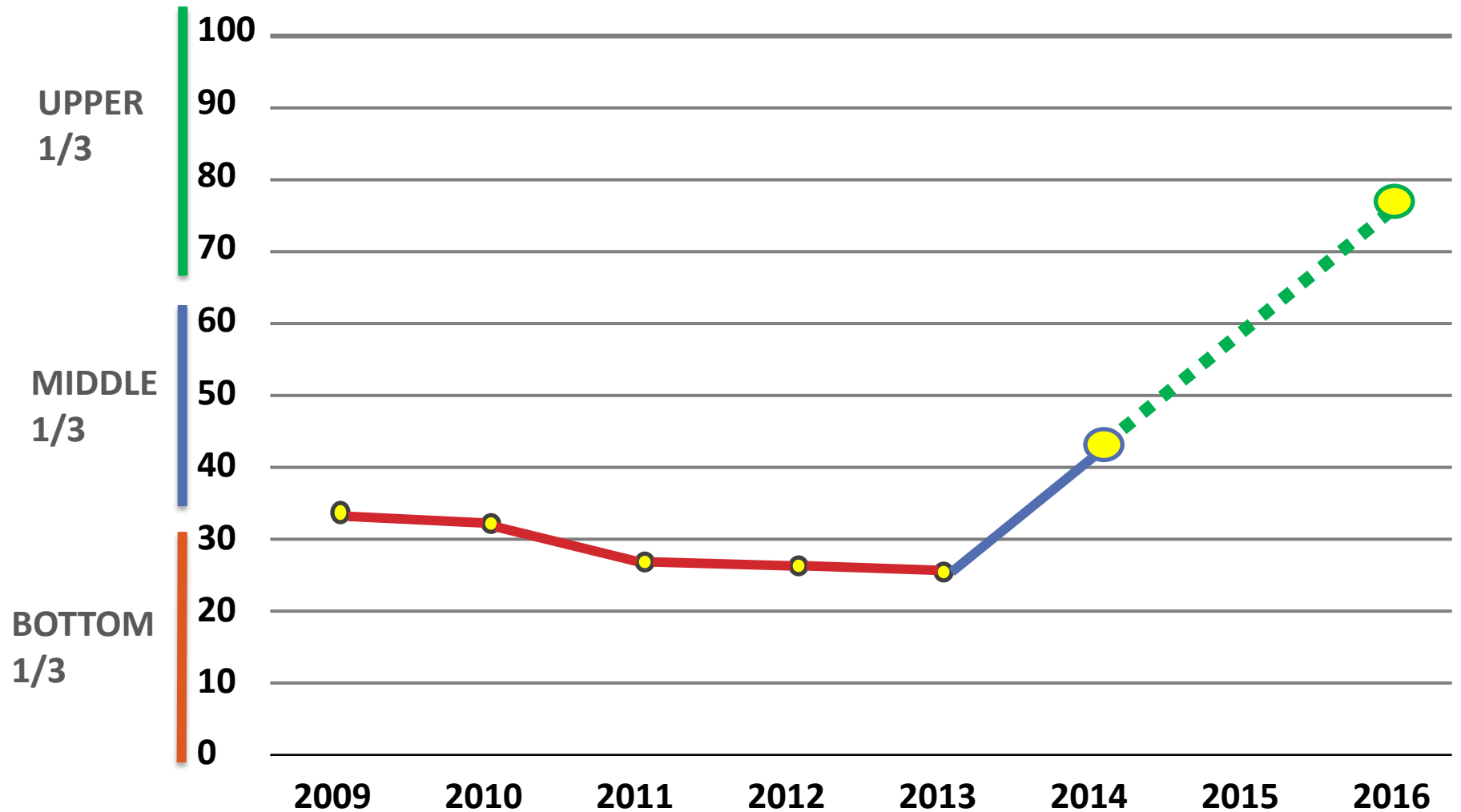
TIMELINE

TOP 10 MOST IMPROVED IN TERMS OF RANKING (2014)

ECONOMY		2013	2014	CHANGE
1	Philippines	138	108	30
2	Ukraine	137	112	25
3	Rwanda	52	32	20
4	Brunei Darussalam	79	59	20
5	Russian Federation	112	92	20
6	Burundi	159	140	19
7	Guatemala	93	79	14
8	Brazil	130	116	14
9	Iraq	165	151	14
10	Kosovo	98	86	12



EASE OF DOING BUSINESS PHILIPPINES (2009-2014)



The Challenge

EASE OF DOING BUSINESS PHILIPPINES (2012-2014)

INDICATORS	2014 (189)	VARIANCE 2013-2014	2013 (185)	2012 (183)
Over-all ranking	108	+30	138	136
1. Starting a business	170	-9	161	158
2. Dealing w/ construction permits	99	+1	100	101
3. Getting electricity	33	+24	57	53
4. Registering Property	121	+1	122	120
5. Getting Credit	86	+43	129	127
6. Protecting Investors	128	--	128	124
7. Paying Taxes	131	+12	143	136
8. Trading across borders	42	+11	53	56
9. Enforcing contracts	114	-3	111	109
10. Resolving Insolvency	100	+65	165	166



EASE OF DOING BUSINESS

ASEAN (2012-2014)

ASEAN	2014 (out of 189)	2013 (out of 185)	CHANGE	2012 (out of 183)	CHANGE
1. Singapore	1	1	0	1	0
2. Malaysia	6	12	6	14	2
3. Thailand	18	18	0	17	-1
4. Brunei Darussalam	59	79	20	83	4
5. Vietnam	99	99	0	99	0
6. Philippines	108	138	30	136	-2
7. Indonesia	120	128	8	130	2
8. Cambodia	137	133	-4	141	8
9. Lao PDR	159	163	4	166	3
10. Myanmar*	182	NDA	0	NDA	0

*Myanmar is one of the four new economies measured in the report together with Libya, San Marino and South Sudan.



Area Code: 108

103	104	105	106	107	108	109	110	111	112	113
										
										
Malta	Kuwait	Nepal	Belize	Grenada	Philippines	Paraguay	Pakistan	Lebanon	Ukraine	Papua New Guinea



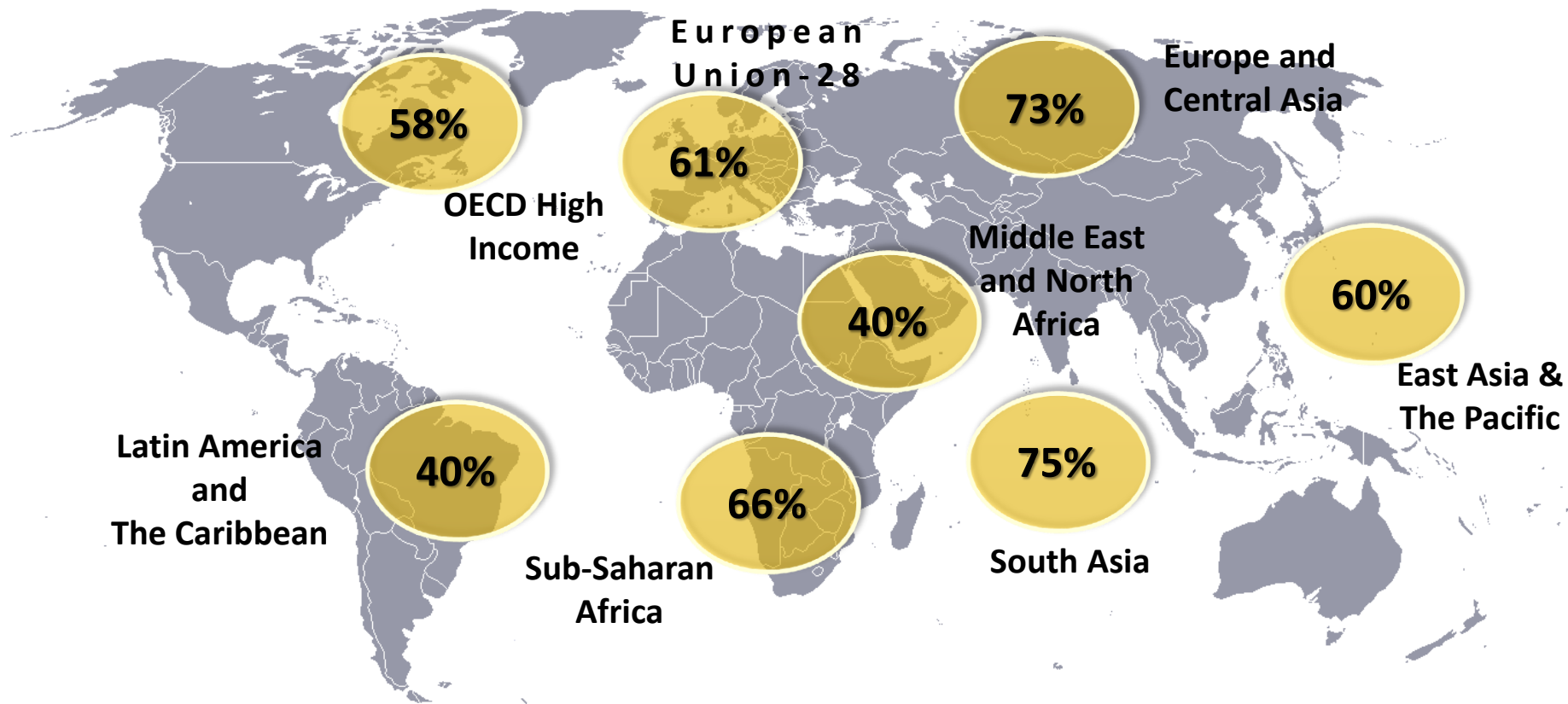
Area Code: 108

Country	2013 Rank
Cambodia	133
Tanzania	134
West Bank and Gaza	135
Lesotho	136
Ukraine	137
Philippines	138
Ecuador	139
Sierra Leone	140
Tajikistan	141
Madagascar	142
Sudan	143

Country	2014 Rank
Malta	103
Kuwait	104
Nepal	105
Belize	106
Grenada	107
Philippines	108
Paraguay	109
Pakistan	110
Lebanon	111
Ukraine	112
Papua New Guinea	113



Economies continue to reform



- **114 Economies implemented 238 reforms in 2012-2013**

Source: Doing Business Database



Even fragile and conflict affected countries are reforming

Despite adverse conditions, these countries implemented 240 reforms improving all areas measured by Doing Business since 2005.

- Starting a Business costs 3.1% (GNI per Capita) in **TIMOR LESTE** 
- In **NEPAL**, Registering Property takes 3 Steps and 5 days. 
- Exporting would cost only USD 670 in **MYANMAR** 
- It only takes 3 steps to get an Electricity Connection in **MICRONESIA** 

Source: Doing Business Database

new cities will be added



For countries with more than 100 million inhabitants, an extra city will be added. These countries include **Bangladesh, Brazil, China, India, Indonesia, Japan, Mexico, Nigeria, Pakistan, the Russian Federation, and the United States.**

Source: Doing Business Database

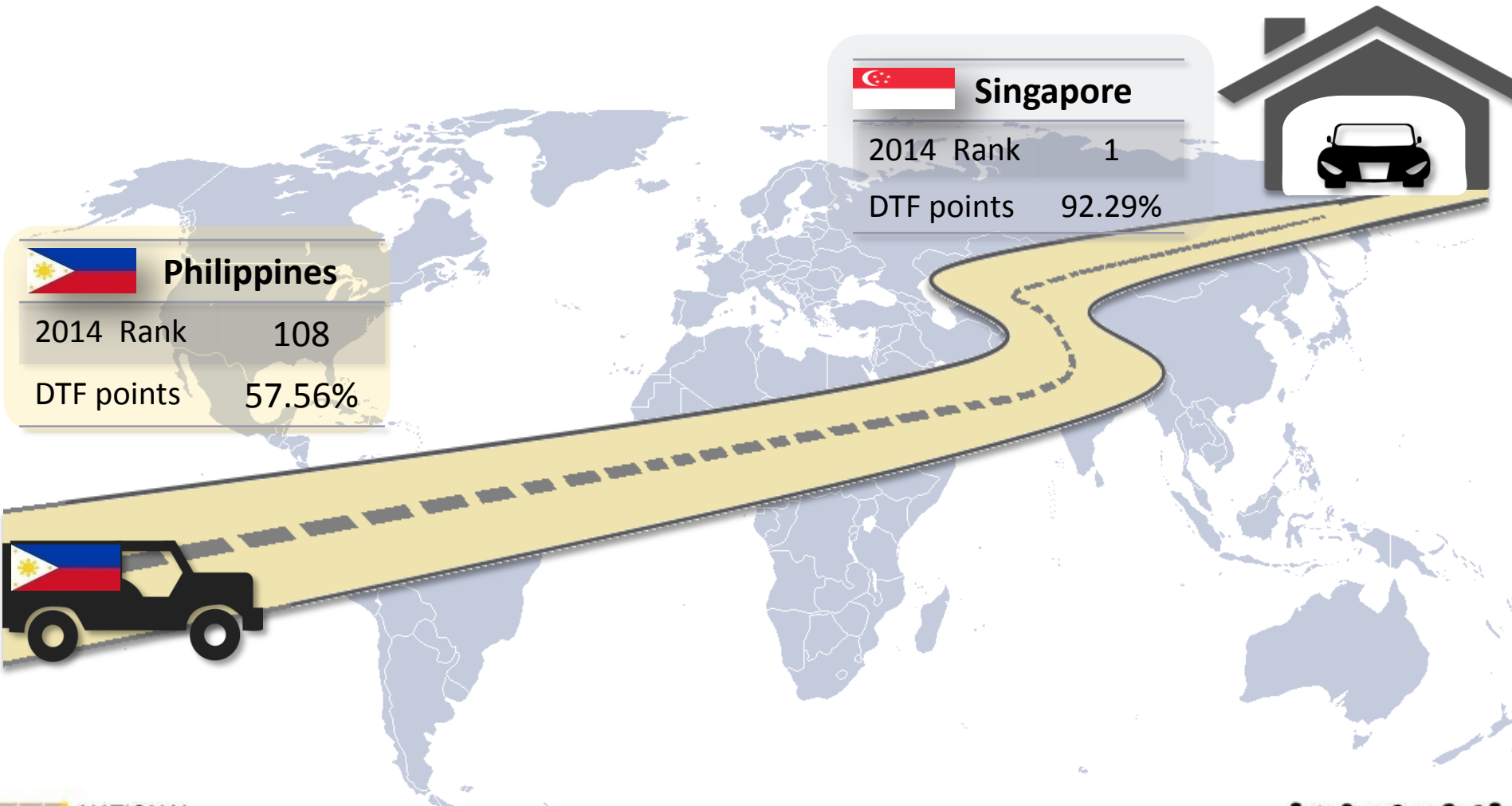


- Complements the doing business ranking which compares economies with one another at a specific point in time
- Distance to frontier shows how an economy has changed over time in absolute terms; doing business ranking shows relative change

Source: Doing Business 2014 <http://www.doingbusiness.org/>



How far is the Philippines to the Frontier?



Who sets the Frontier?

Indicator	Philippines DTF Points	Who sets the Frontier?		Frontier DTF Points
Starting a Business	65.00		New Zealand	99.96
Dealing With Construction Permits	67.34		Hong Kong	96.07
Getting Electricity	82.76		Germany	99.83
Registering Property	64.17		Georgia	99.81
Getting Credit	56.25		Malaysia	100
Protecting Investors	43.33		New Zealand	96.67
Paying Taxes	62.25		UAE	98.88
Trading Across Borders	76.20		Singapore	95.81
Enforcing Contracts	51.83		Singapore	89.86
Resolving Insolvency	31.69		Japan	98.31

Source: Doing Business Database



Gameplan 2.0

2014 RANKING OF ASEAN COUNTRIES PER INDICATOR

ASEAN		Starting a Business	Dealing w/ Construction Permits	Getting Electricity	Registering Property	Getting Credit	Protecting Investors	Paying Taxes	Trading Across Borders	Enforcing Contracts	Resolving Insolvency
Singapore	1 --	3 ↑	3 ↓	6 ↓	28 ↑	3 ↑	2 --	5 --	1 --	12 --	4 ↓
Malaysia	6 ↑	16 ↑	43 ↑	21 ↑	35 ↓	1 --	4 --	36 ↓	5 ↑	30 ↑	42 ↑
Thailand	18 --	91 ↓	14 ↑	12 ↓	29 ↓	73 ↓	12 ↑	70 ↑	24 ↓	22 ↑	58 --
Brunei	59 ↑	137 ↓	46 ↓	29 --	116 ↓	55 ↑	115 ↑	20 ↑	39 ↑	161 ↓	48 ↓
Vietnam	99 --	109 ↓	29 ↓	156 ↓	51 ↓	42 ↓	157 ↑	149 ↓	65 ↑	46 ↓	149 --
Philippines	108 ↑	170 ↓	99 ↑	33 ↑	121 ↑	86 ↑	128 --	131 ↑	42 ↑	114 ↓	100 ↑
Indonesia	120 ↑	175 ↓	88 ↓	121 ↑	101 ↓	86 ↑	52 ↓	137 ↓	54 ↓	147 ↓	144 ↑
Cambodia	137 ↓	184 ↓	161 ↓	134 ↓	118 ↓	42 ↑	80 ↑	65 ↑	114 ↑	162 ↓	163 ↓
Laos	159 ↑	85 ↓	96 ↓	140 ↓	76 ↓	159 ↑	187 ↓	119 ↑	161 ↓	104 ↑	189 ↓
Myanmar	182 --	189 --	150 --	126 --	154 --	170 --	182 --	107 --	113 --	188 --	155 --



STARTING A BUSINESS BENCHMARK: MALAYSIA

ECONOMY		PROCEDURES (NUMBER)	TIME (DAYS)	COST (% OF INCOME PER CAPITA)	PAID-IN MIN. CAPITAL (% OF INCOME PER CAPITA)	RANK
1	Singapore	3	3	0.6	-	3
* 2	Malaysia	3	6	7.6	-	16
3	Lao PDR	6	92	6.7	-	85
4	Thailand	4	28	6.7	0.0	91
5	Vietnam	10	34	7.7	-	109
6	Brunei Darussalam	15	101	9.9	-	137
7	Philippines	15	35	18.7	4.6	170
8	Indonesia	10	48	20.5	38.5	175
9	Cambodia	11	104	150.6	27.5	184
10	Myanmar	11	72	176.7	7,016.0	189



STARTING A BUSINESS SCORE SIMULATION

INDICATOR	2014 REPORT	2015 REPORT	MOVEMENT / CHANGE IN RANK
Number of Days	35	6	-29 days
Number of Steps	15	3	-12 steps
Cost (% income/per capita)	18.7	18.7	--
Min Paid In Capital	4.6	0	-4.6
Effect in indicator ranking	170	30	↑ 140
Effect in world ranking	108	85	↑ 23

RECOMMENDATION	AGENCY
- Reduce number of days and steps - Reduce cost - Implement Online Business Registration - Consider removing Min. Paid in Capital	SEC, QC, SSS, PBR, BIR, Philhealth, Pag-ibig SEC/Congress



DEALING WITH CONSTRUCTION PERMITS

BENCHMARK: THAILAND

ECONOMY		PROCEDURES (NUMBER)	TIME (DAYS)	COST (% OF INCOME PER CAPITA)	EASE OF CONSTRUCTION RANK
1	Singapore	11	26	15.7	3
* 2	Thailand	8	157	8.3	14
3	Vietnam	11	114	56.3	29
4	Malaysia	15	130	14.7	43
5	Brunei Darussalam	22	95	3.5	46
6	Indonesia	13	158	87.2	88
7	Lao PDR	23	108	45.8	96
8	Philippines	25	77	79.4	99
9	Myanmar	16	159	566.9	150
10	Cambodia	21	652	35.7	161



DEALING WITH CONSTRUCTION PERMITS SCORE SIMULATION

INDICATOR	2014 REPORT	2015 REPORT	MOVEMENT / CHANGE IN RANK
Number of Days	77	77	--
Number of Steps	25	8	-17 steps
Cost (% income per capita)	79.4	79.4	--
Effect in indicator ranking	99	10	↑ 89
Effect in world ranking	108	97	↑ 11

RECOMMENDATION	AGENCY
- Reduce the number of Steps - Consider reducing cost	QC-LGU , BFP, Registry of Deeds, Maynilad,



GETTING ELECTRICITY

BENCHMARK: THAILAND

ECONOMY		PROCEDURES (NUMBER)	TIME (DAYS)	COST (% OF INCOME PER CAPITA)	RANK
1	Singapore	4	36	27.5	6
* 2	Thailand	4	35	67.3	12
3	Malaysia	5	32	49.1	21
4	Brunei Darussalam	5	56	35.9	29
5	Philippines	5	42	118.2	33
6	Indonesia	6	101	370.6	121
7	Myanmar	5	91	3,175.5	126
8	Cambodia	4	168	2,636.1	134
9	Lao PDR	5	134	1,913.0	140
10	Vietnam	6	115	1,726.4	156



GETTING ELECTRICITY SCORE SIMULATION

INDICATOR	2014 REPORT	2015 REPORT	MOVEMENT / CHANGE IN RANK
Number of Days	42	35	-7 days
Number of Steps	5	4	-1 step
Cost (% income per capita)	118.2	118.2	--
Effect in indicator ranking	33	16	↑ 17
Effect in world ranking	108	104	↑ 4

RECOMMENDATION	AGENCY
• Reduce number of steps • Reduce number days • Consider reducing Cost	QC-LGU, MERALCO



REGISTERING PROPERTY BENCHMARK: SINGAPORE

	ECONOMY	PROCEDURES (NUMBER)	TIME (DAYS)	COST (% OF PROPERTY VALUE)	EASE OF PROPERTY RANK
*1	Singapore	5	6	2.9	28
2	Thailand	2	2	6.3	29
3	Malaysia	5	14	3.3	35
4	Vietnam	4	57	0.6	51
5	Lao PDR	5	98	1.1	76
6	Indonesia	6	22	10.9	101
7	Brunei Darussalam	7	298	0.6	116
8	Cambodia	7	56	4.4	118
9	Philippines	8	39	4.8	121
10	Myanmar	6	113	7.2	154



REGISTERING PROPERTY SCORE SIMULATION

INDICATOR	2014 REPORT	2015 REPORT	MOVEMENT / CHANGE IN RANK
Number of Days	39	6	-33 days
Number of Steps	8	5	-3 steps
Cost (% of property value)	4.8	4.8	--
Effect in indicator ranking	121	39	↑ 82
Effect in world ranking	108	96	↑ 12

RECOMMENDATION	AGENCY
- Reduce number of steps - Reduce number days - Automation of C.A.R.	QC-LGU, LRA and BIR

GETTING CREDIT

BENCHMARK: MALAYSIA

	ECONOMY	CREDIT INFORMATION INDEX	LEGAL RIGHTS INDEX	SUM GETTING CREDIT	EASE OF CREDIT RANK
*1	Malaysia	6	10	16	1
2	Singapore	5	10	15	3
3	Vietnam	4	8	12	42
4	Cambodia	4	8	12	42
5	Brunei Darussalam	4	7	11	55
6	Thailand	5	5	10	73
7	Indonesia	4	5	9	86
8	Philippines	5	4	9	86
9	Lao PDR	2	4	6	159
10	Myanmar	-	4	4	170



GETTING CREDIT SCORE SIMULATION

INDICATOR	2014 REPORT	2015 REPORT	CHANGE IN RANK
Credit Information Index	5	6	+1
Legal Rights Index	4	10	+6
Effect in indicator ranking	86	1	↑ 85
Effect in world ranking	108	85	↑ 23

RECOMMENDATION	AGENCY
• Make credit data on utilities available • Review Collateral and Bankruptcy Laws • National Collateral registry	Utility Companies DOJ,, Congress, ACRRALAW, LRA

PROTECTING INVESTORS

BENCHMARK: MALAYSIA

	ECONOMY	DISCLOSURE INDEX	DIRECTOR LIABILITY INDEX	SHAREHOLDER SUITS INDEX	RANK
1	Singapore	10	9	9	2
*2	Malaysia	10	9	7	4
3	Thailand	10	7	6	12
4	Indonesia	10	5	3	52
5	Cambodia	5	10	1	80
6	Brunei Darussalam	4	2	8	115
7	Philippines	2	3	8	128
8	Vietnam	7	1	2	157
9	Myanmar	3	-	4	182
10	Lao PDR	2	1	2	187



PROTECTING INVESTORS SCORE SIMULATION

INDICATOR	2014 REPORT	2015 REPORT	MOVEMENT / CHANGE IN RANK
Disclosure	2	10	+8
Director Liability	3	9	+6
Shareholder Suits Index	8	8	--
Effect in indicator ranking	128	3	↑ 105
Effect in world ranking	108	78	↑30

RECOMMENDATION	AGENCY
Review Corporations Code of the Philippines	DOJ, Congress, ACRRALAW and SEC

PAYING TAXES

BENCHMARK: MALAYSIA

	ECONOMY	PAYMENTS (NUMBER)	TIME (HOURS)	TOTAL TAX RATE (% PROFIT)	EASE OF TAXES RANK
1	Singapore	5	82	27.1	5
2	Brunei Darussalam	27	96	16.1	20
*3	Malaysia	13	133	36.3	36
4	Cambodia	40	173	21.4	65
5	Thailand	22	264	29.8	70
6	Myanmar	31	155	48.9	107
7	Lao PDR	34	362	26.8	119
8	Philippines	36	193	44.5	131
9	Indonesia	52	259	32.2	137
10	Vietnam	32	872	35.2	149



PAYING TAXES

SCORE SIMULATION

INDICATOR	2014 REPORT	2015 REPORT	MOVEMENT/ CHANGE IN RANK
Number of Payments	36	13	23
Number of Hours	193	193	--
Total Tax Rate	44.5	44.5	--
Effect in indicator ranking	131	80	↑ 51
Effect in world ranking	108	103	↑ 5

RECOMMENDATION	AGENCY
• Reduce number of payments • Reduce number of Hours • Consider reducing tax rate	PAG-IBIG, PHILHEALTH, BIR

TRADING ACROSS BORDERS

BENCHMARK: SINGAPORE

	ECONOMY	DOCUMENTS FOR EXPORT (NUMBER)	TIME FOR EXPORT (DAYS)	COST TO EXPORT (US\$ PER CONTAINER)	DOCUMENTS FOR IMPORT (NUMBER)	TIME FOR IMPORT (DAYS)	COST TO IMPORT (US\$ PER CONTAINER)	EASE OF TRADING RANK
*1	Singapore	3	6	460	3	4	440	1
2	Malaysia	4	11	450	4	8	485	5
3	Thailand	5	14	595	5	13	760	24
4	Brunei Darussalam	5	19	705	5	15	770	39
5	Philippines	6	15	585	7	14	660	42
6	Indonesia	4	17	615	8	23	660	54
7	Vietnam	5	21	610	8	21	600	65
8	Myanmar	9	25	670	9	27	660	113
9	Cambodia	8	22	795	9	24	930	114
10	Lao PDR	10	23	1,950	10	26	1,910	161



TRADING ACROSS BORDERS

SCORE SIMULATION

INDICATOR	2014 REPORT	2015 REPORT	MOVEMENT/ CHANGE IN RANK
Documents to Import	7	3	-3
Days to Import	14	4	-10
Cost (US\$/container)	660	660	--
Documents to Export	6	3	-3
Days to Export	15	6	-9
Cost (US\$/container)	585	585	--
Effect in indicator ranking	42	3	↑ 39
Effect in world ranking	108	99	↑ 9

RECOMMENDATION	AGENCY
- Reduce documents to import and export - Reduce days to import and export	BOC

ENFORCING CONTRACTS

BENCHMARK: MALAYSIA

ECONOMY		PROCEDURES (NUMBER)	TIME (DAYS)	COST (% OF CLAIM)	EASE OF CONTRACTS RANK
1	Singapore	21	150	25.8	12
2	Thailand	36	440	15.0	22
*3	Malaysia	29	425	27.5	30
4	Vietnam	36	400	29.0	46
5	Lao PDR	42	443	31.6	104
6	Philippines	37	842	26.0	114
7	Indonesia	40	498	139.4	147
8	Brunei Darussalam	47	540	36.6	161
9	Cambodia	44	483	103.4	162
10	Myanmar	45	1,160	51.5	188



ENFORCING CONTRACTS

SCORE SIMULATION

INDICATOR	2014 REPORT	2015 REPORT	MOVEMENT/ CHANGE IN RANK
Number of Days	842	425	417
Number of Steps	37	29	8
Cost (% of Claim)	26.0	26.0	--
Effect in indicator ranking	114	24	↑ 90
Effect in world ranking	108	97	↑ 11

RECOMMENDATION	AGENCY
• Reduce number of steps • Reduce number days • Fully implement e-court system	DOJ, ACCRALAW

RESOLVING INSOLVENCY BENCHMARK: THAILAND

ECONOMY		TIME (YEARS)	COST (% OF ESTATE)	RECOVERY RATE (CENTS ON THE DOLLAR)	EASE OF RESOLVING RANK
1	Singapore	0.8	3	89.4	4
2	Malaysia	1.5	10	48.9	42
3	Brunei Darussalam	2.5	4	47.2	48
*4	Thailand	2.7	36	42.2	58
5	Philippines	2.7	22	29.9	100
6	Indonesia	4.5	18	17.9	144
7	Vietnam	5.0	15	16.2	149
8	Myanmar	5.0	18	14.7	155
9	Cambodia	6.0	28	8.2	163
10	Lao PDR	no practice	no practice	-	189



RESOLVING INSOLVENCY SCORE SIMULATION

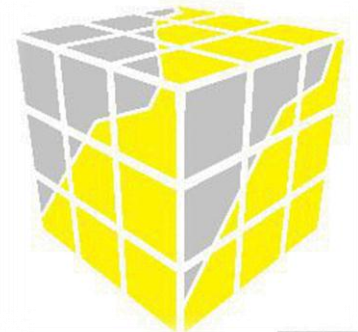
INDICATOR	2014 REPORT	2015 REPORT	MOVEMENT/ CHANGE IN RANK
Time	2.7	2.7	--
Cost	22	22	--
Recovery Rate	29.9	42.2	12.3
Effect in indicator ranking	100	58	↑ 42
Effect in world ranking	108	99	↑ 9

RECOMMENDATION	AGENCY
- Monitor Implementation of FRIA. - Monitor effect of FRIA – IRR to the Time and Cost	DOJ

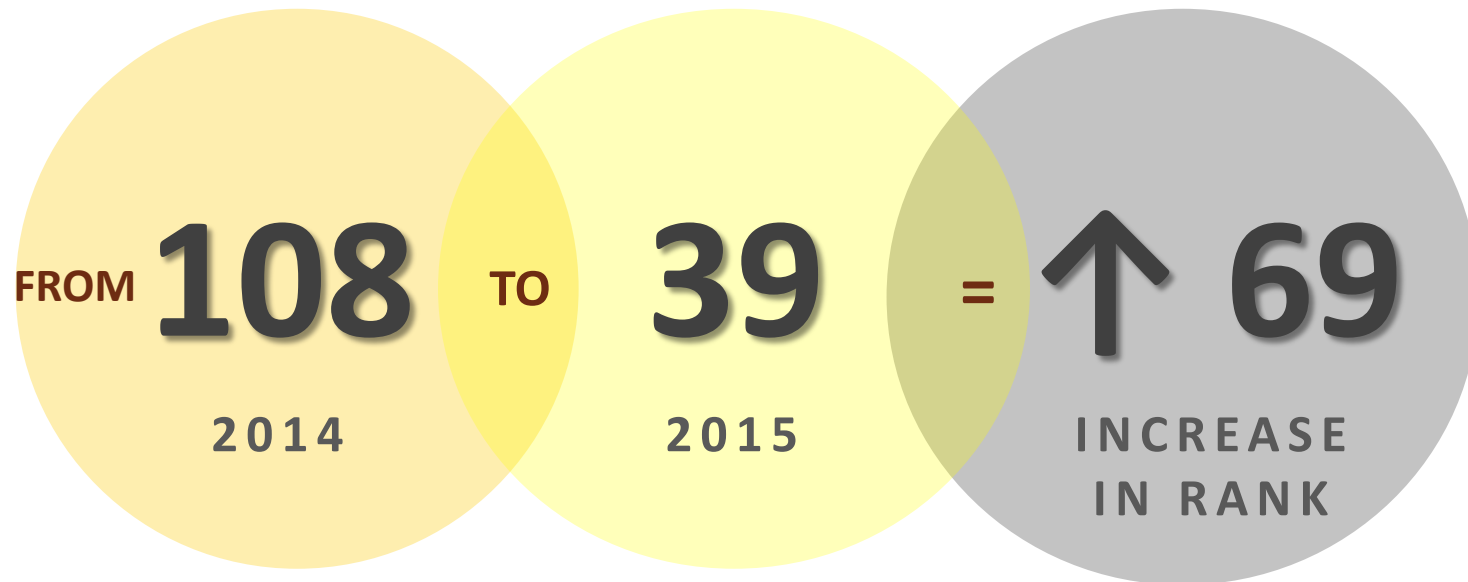
THE RESULTS

Scenarios:

- **Low Hanging Fruit** - Impact of FULL implementation of Doing Business 2013 reform inventory.
- **Big Impact Indicators** – Implement reforms on 4 identified big impact indicators (Starting a Business, Registering Property, Getting Credit, Protecting Investors).
- **Stretch targets** – Implement suggested reforms for all indicators.



RESULT: LOW HANGING FRUIT SCENARIO



Low Hanging Fruit - Impact of FULL implementation of Doing Business 2013 reform inventory on 8 indicators (Starting a business, Dealing with Construction Permits, Registering Property, Getting Electricity, Getting Credit, Protecting Investors, Paying Taxes and Trading Across Borders)

RESULT: LOW HANGING FRUIT

NEW ASEAN RANK

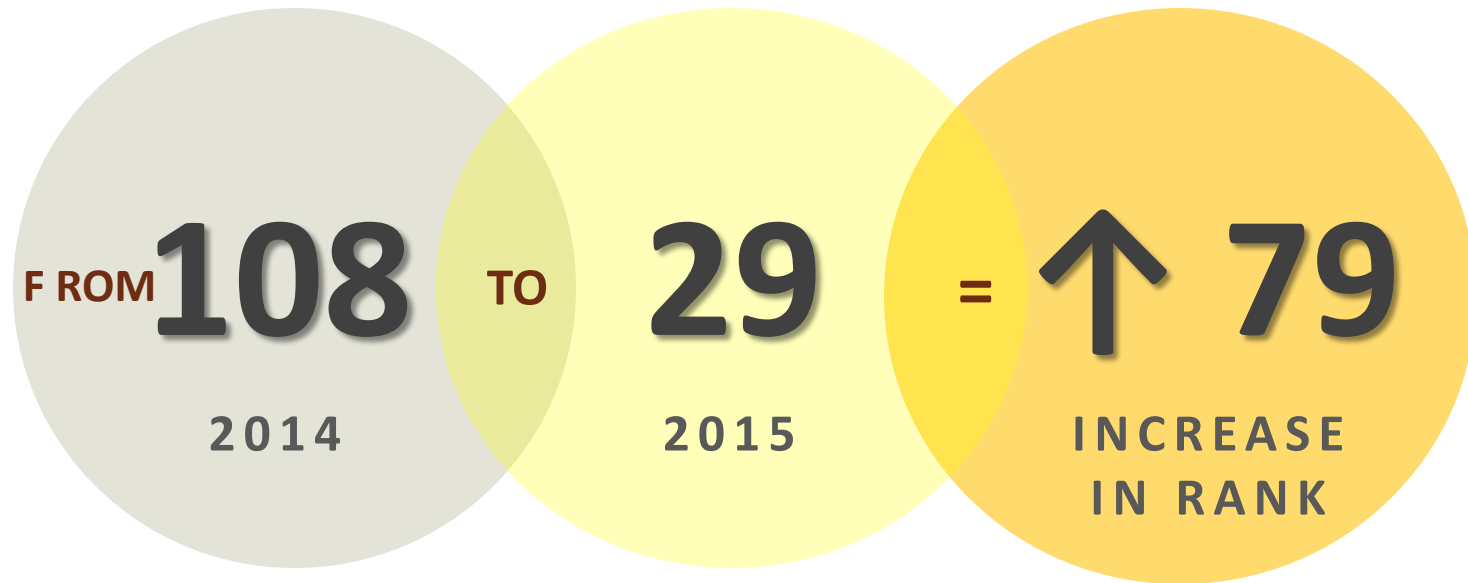
move from 6 to 4



ECONOMY		2014 REPORT	RANK AS OF CURRENT DATA AND SIMULATION
1	Singapore	1	1
2	Malaysia	6	6
3	Thailand	18	18
*4	Philippines	108	39
5	Brunei Darussalam	59	59
6	Vietnam	99	99
7	Indonesia	120	120
8	Cambodia	137	137
9	Lao PDR	159	159
10	Myanmar	182	182



RESULT: BIG IMPACT INDICATORS



- **Big Impact Indicators** – Implement reforms on 4 identified big impact indicators (Starting a Business, Registering Property, Getting Credit, Protecting Investors).

RESULT: BIG IMPACT INDICATORS

NEW ASEAN RANK

move from 6 to 4 →

ECONOMY		2014 REPORT	RANK AS OF CURRENT DATA AND SIMULATION
1	Singapore	1	1
2	Malaysia	6	6
3	Thailand	18	18
*4	Philippines	108	29
5	Brunei Darussalam	59	59
6	Vietnam	99	99
7	Indonesia	120	120
8	Cambodia	137	137
9	Lao PDR	159	159
10	Myanmar	182	182



RESULT STRETCH TARGETS



- **Stretch targets** – Implement suggested reforms on ALL indicators based on the new benchmarks.

RESULT: STRETCH TARGETS

NEW ASEAN RANK

move from 6 to 3 →

ECONOMY		2014 REPORT	RANK AS OF CURRENT DATA AND SIMULATION
1	Singapore	1	1
2	Malaysia	6	6
3	Philippines	108	7
4	Thailand	18	18
5	Brunei Darussalam	59	59
6	Vietnam	99	99
7	Indonesia	120	120
8	Cambodia	137	137
9	Lao PDR	159	159
10	Myanmar	182	182



Lessons Learned

TRANSPARENCY LEADS TO COMPETITIVENESS



Governance Matters

**WORK IN
PROGRESS**

is not good enough



Execution and Delivery



Teamwork is required

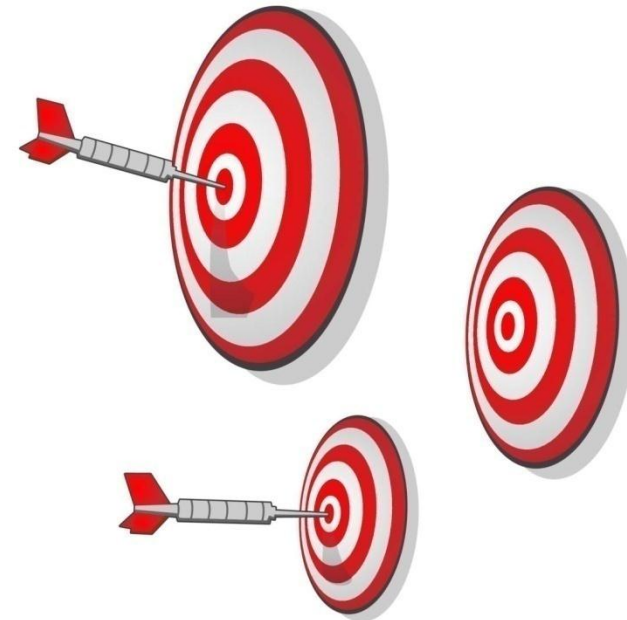
**NO MORE
SILOS**





on multiple fronts

**NO SINGLE
VARIABLE**



**THE
COMPETITION
NEVER
SLEEPS**



THE BAR ALWAYS RISES



We move up a
weight class and
meet larger,
stronger
competition

SPEED-TO-REFORM SHOULD BE OUR NEW MANTRA



MAINTAIN MOMENTUM

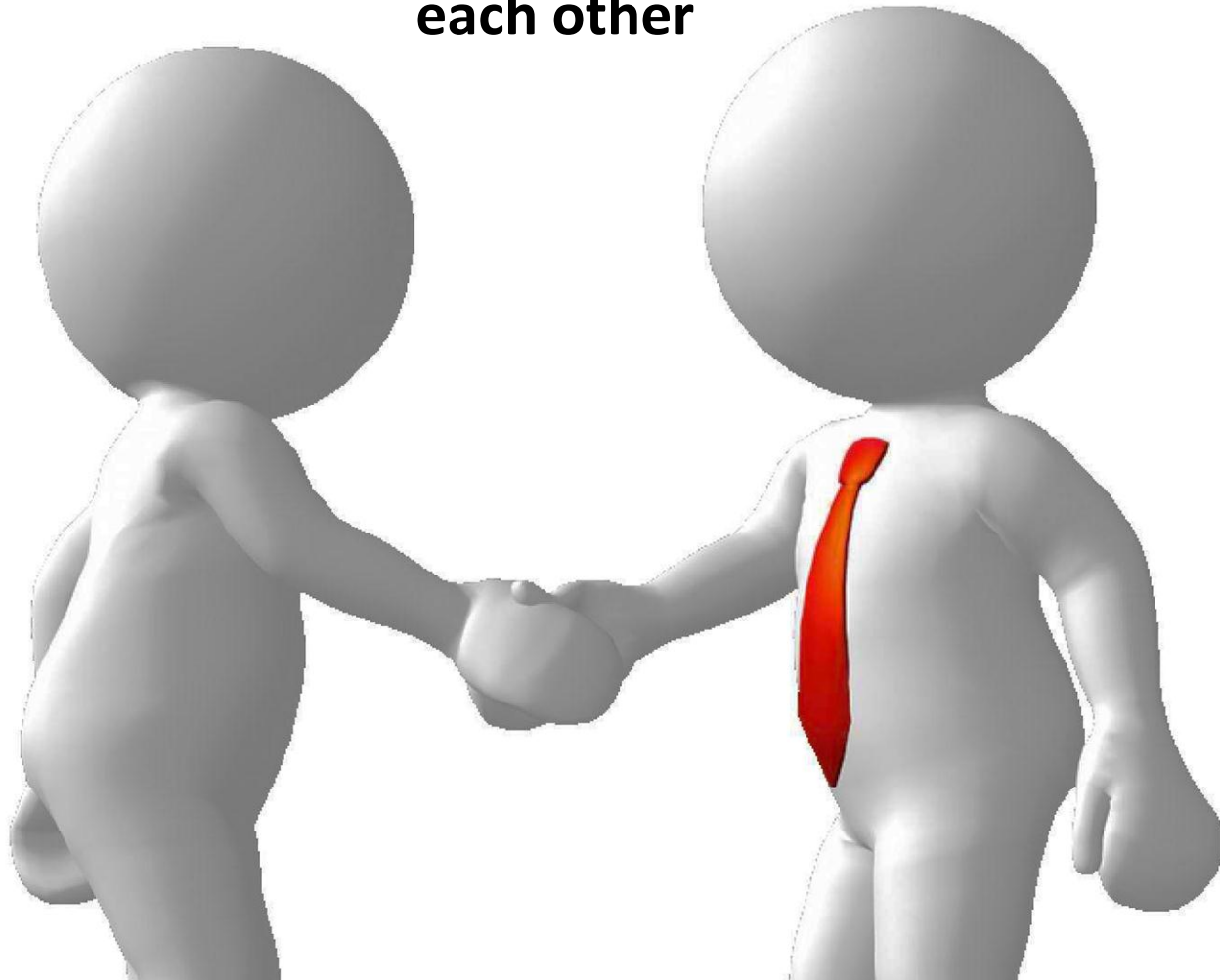


EMBED AND INSTITUTIONALIZE CHANGE



PUBLIC – PRIVATE COLLABORATION IS IMPORTANT AND EFFECTIVE.

**We learn from
each other**



How to get to the top?



EVOLUTION

EVOLUTION





BAYANIHAN







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