



NATIONAL
COMPETITIVENESS
COUNCIL | PHILIPPINES

Getting Tough on Ease of Doing Business

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Private Sector Co-Chairman

**3rd Annual GGAPP Forum on Good Governance,
Business Ethics and Compliance**
March 17, 2014, Intercontinental Hotel





CITIES AND MUNICIPALITIES COMPETITIVENESS INDEX

Overall Competitiveness – Top 10 Cities

Rank	Region	Province	LGU	Score
1	Northern Mindanao	Misamis Oriental	Cagayan de Oro City	72.09
2	Western Visayas	Iloilo City	Iloilo City	68.23
3	Central Luzon	Pampanga	San Fernando City	67.89
4	CARAGA	Agusan del Norte	Butuan City	63.07
5	Western Visayas	Negros Occ.	Bacolod City	61.62
6	SOCCSKSARGEN	South Cotabato	Koronadal	61.27
7	Ilocos Region	La Union	San Fernando	61.17
8	Central Luzon	Zambales	Olongapo City	60.63
9	Bicol Region	Camarines Sur	Naga	60.53
10	NCR		Marikina	59.73



CITIES AND MUNICIPALITIES COMPETITIVENESS INDEX

Government Efficiency – Top 10 Cities

Rank	Region	Province	LGU	Score
1	Western Visayas	Iloilo	Iloilo	22.89
2	Western Visayas	Negros Occidental	Bacolod	21.98
3	N. Mindanao	Misamis Oriental	Cagayan De Oro	20.77
4	Western Visayas	Negros Occidental	Sagay	20.69
5	Bicol Region	Camarines Sur	Naga	20.10
6	Bicol Region	Albay	Ligao	20.08
7	Bicol Region	Camarines Sur	Iriga	19.88
8	Bicol Region	Albay	Tabaco	19.81
9	Bicol Region	Albay	Legazpi	19.77
10	Western Visayas	Negros Occidental	Talisay	19.54



CITIES AND MUNICIPALITIES COMPETITIVENESS INDEX


Infrastructure – Top 10 Cities

Rank	Region	Province	LGU	Score
1	Bicol Region	Camarines Sur	Naga	29.54
2	Central Luzon	Pampanga	San Fernando	28.58
3	N. Mindanao	Misamis Oriental	Cagayan De Oro	28.30
4	NCR		Quezon	26.84
5	Bicol Region	Albay	Legazpi	25.17
6	NCR		Caloocan	24.88
7	Ilocos Region	La Union	San Fernando	24.85
8	Central Luzon	Tarlac	Tarlac	24.10
9	Bicol Region	Sorsogon	Sorsogon	23.35
10	Western Visayas	Iloilo	Iloilo	23.21

GLOBAL COMPETITIVENESS REPORT CARD

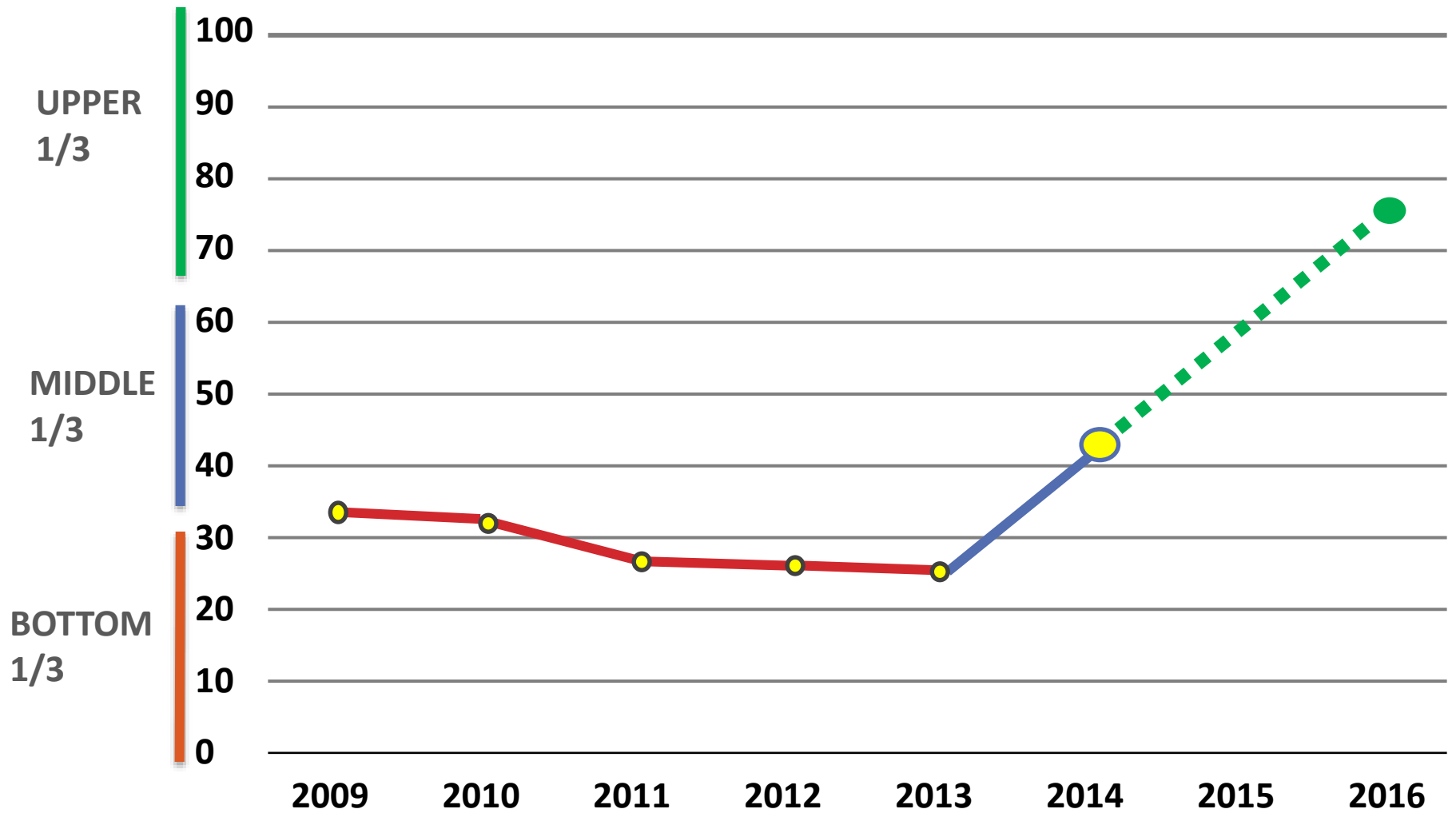
REPORT	2014 RANK	2013 RANK	2012 RANK	2011 RANK	CHANGE	ASEAN	NEXT REPORT	SOURCE	TARGET
1. WEF Global Competitiveness Index		59/148	65/144	75/142	↑ 6	6 of 10	Sep-14	WEF	49
2. IFC Ease of Doing Business		108/189	138/185	136/183	↑ 30	6 of 10	Oct-14	IFC	63
3. IMD World Competitiveness Report		38/60	43/59	41/59	↑ 5	4 of 5	May-14	IMD	20
4. TI Corruption Perception Index		94/177	105/179	129/183	↑ 11	4 of 10	Dec-13	Transparency International	60
5. Economic Freedom Index	89/178	97/177	107/179	115/179	↑ 8	5 of 7	Jan-14	Heritage Foundation	59
6. Global Information Technology Report		86/144	86/142	86/138	no change	6 of 7	Apr-14	WEF	47
7. Travel and Tourism Report		82/140	n/a	94/139	↑ 12	7 of 8	Mar-15	WEF	46
8. Global Innovation Index		90/142	95/141	91/125	↑ 5	7 of 9	Jul-14	WIPO	47
9. Logistics Performance Index		--	52/155	44/155	↓ 8	4 of 9	Feb-14	World Bank	51
10. Failed States Index		59/178	56/177	51/177	↑ 3	7 of 10	Jun-14	Fund for Peace	118

*****As of Jan 2014



REPORT	CHANGE 2013 VS 2012	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	+5	+3
4. Transparency International Corruption Perceptions Index	+11	+35
5. Economic Freedom Index	+10	+18
6. Global IT Report (WEF)	0	0
7. Travel and Tourism Report (WEF)	+12	+12
8. Global Innovation Index	+5	+17

EASE OF DOING BUSINESS PHILIPPINES (2009-2014)



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.

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 (2012-2014)

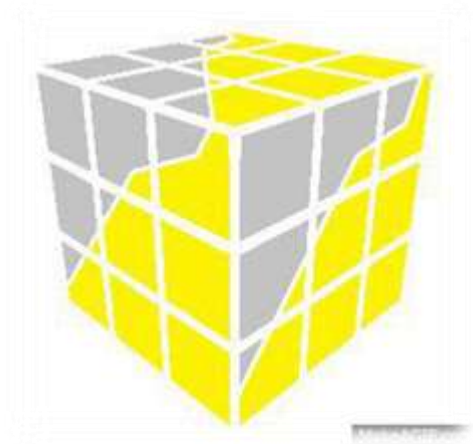
INDICATORS	2014 (189)	VARIANCE 2013-2014	2013 (185)	2012 (183)
Over-all ranking	108	+30	138	136
1. Starting a business	170	-9	161	158
2. Dealing w/ construction permits	99	+1	100	101
3. Getting electricity	33	+24	57	53
4. Registering Property	121	+1	122	120
5. Getting Credit	86	+43	129	127
6. Protecting 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





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GAMEPLAN 1.0



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

8

Doing
Business
Task
Force



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





FROM:

16

STEPS

36

DAYS

2013



TO:

11

STEPS

11

DAYS

2014



TO:

3

STEPS

“3”

DAYS

2014





STARTING A BUSINESS

16 Steps / 36 Days

START

Verify and reserve company name with SEC.

Deposit paid-up capital and obtain bank certificate.

Notarize articles of incorporation and treasurer's affidavit.

Register the company with SEC and receive pre-registered TIN.

Buy special books of account at bookstore.

Obtain business permit from BPLO.

Pay annual community tax and obtain community tax certificate.

Obtain barangay clearance.

Apply and pay for Certificate of Registration and obtain TIN at BIR.

Pay registration fee and documentary stamp taxes

Obtain authority to print receipts and invoices from BIR.

Print receipts and invoices.

END

Register with Pag-IBIG.

Register with PhilHealth.

Register with SSS.

Have books of accounts and Printer's Certificate of Delivery stamped by BIR.



STARTING A BUSINESS

START

Verify and reserve company name with SEC.

Deposit paid-up capital and obtain bank certificate.

Notarize articles of incorporation and treasurer's affidavit.

Register the company with SEC and receive pre-registered TIN.

Buy special books of account at bookstore.

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Apply and pay for Certificate of Registration and obtain TIN at BIR.

Pay registration fee and documentary stamp taxes

Obtain authority to print receipts and invoices from BIR.

Print receipts and invoices.

Register with Pag-IBIG.

Register with PhilHealth.

Register with SSS.

Have books of accounts and Printer's Certificate of Delivery stamped by BIR.

END



STARTING A BUSINESS

15 Steps / 35 Days

START

Verify and reserve company name with SEC.

Deposit paid-up capital and obtain bank certificate.

Notarize articles of incorporation and treasurer's affidavit.

Register the company with SEC and receive pre-registered TIN.

Buy special books of account at bookstore.

Obtain business permit from BPLO.

Pay annual community tax and obtain community tax certificate.

Obtain barangay clearance.

Apply and pay for Certificate of Registration and obtain TIN at BIR.

Pay registration fee and documentary stamp taxes

Obtain authority to print receipts and invoices from BIR.

Print receipts and invoices.

END

Register with Pag-IBIG.

Register with PhilHealth.

Register with SSS.

Have books of accounts and Printer's Certificate of Delivery stamped by BIR.



2015 EODB Target: Starting a Business

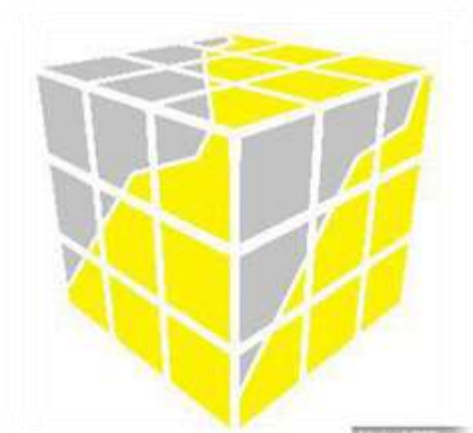
(3 steps, 3 days)





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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
<ul style="list-style-type: none"> • Reduce number of days and steps • Reduce cost • Implement Online Business Registration • Consider removing Min. Paid in Capital 	<p>SEC, QC, SSS, PBR, BIR, Philhealth, Pag-ibig</p> <p>SEC/Congress</p>

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
<ul style="list-style-type: none">• Reduce the number of Steps• Consider reducing cost	QC-LGU , BFP, Registry of Deeds, Maynilad,

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
<ul style="list-style-type: none">• Reduce number of steps• Reduce number days• Automation of C.A.R.	QC-LGU, LRA and BIR

	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
<ul style="list-style-type: none">• 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
<ul style="list-style-type: none">• 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
<ul style="list-style-type: none">• 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

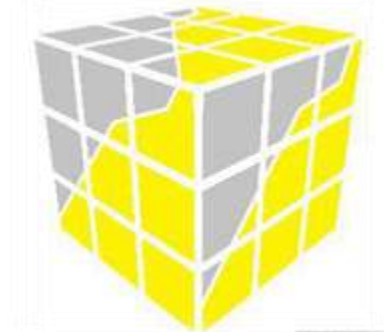
INDICATOR	2014 REPORT	2015 REPORT	MOVEMENT/ CHANGE IN RANK
Time	2.7	2.7	--
Cost	22	22	--
Recovery Rate	29.9	42.2	12.3
Effect in indicator ranking	100	58	↑ 42
Effect in world ranking	108	99	↑ 9

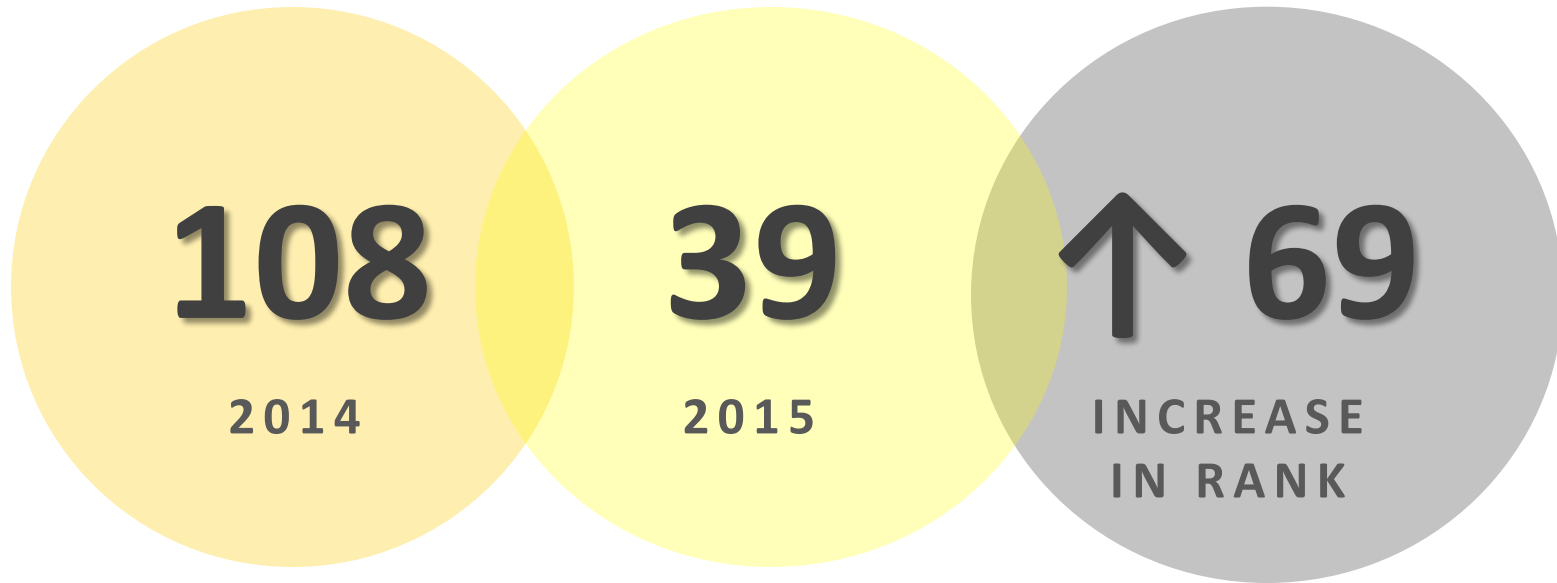
RECOMMENDATION	AGENCY
<ul style="list-style-type: none">• Monitor Implementation of FRIA.• Monitor effect of FRIA – IRR to the Time and Cost	DOJ



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.





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)

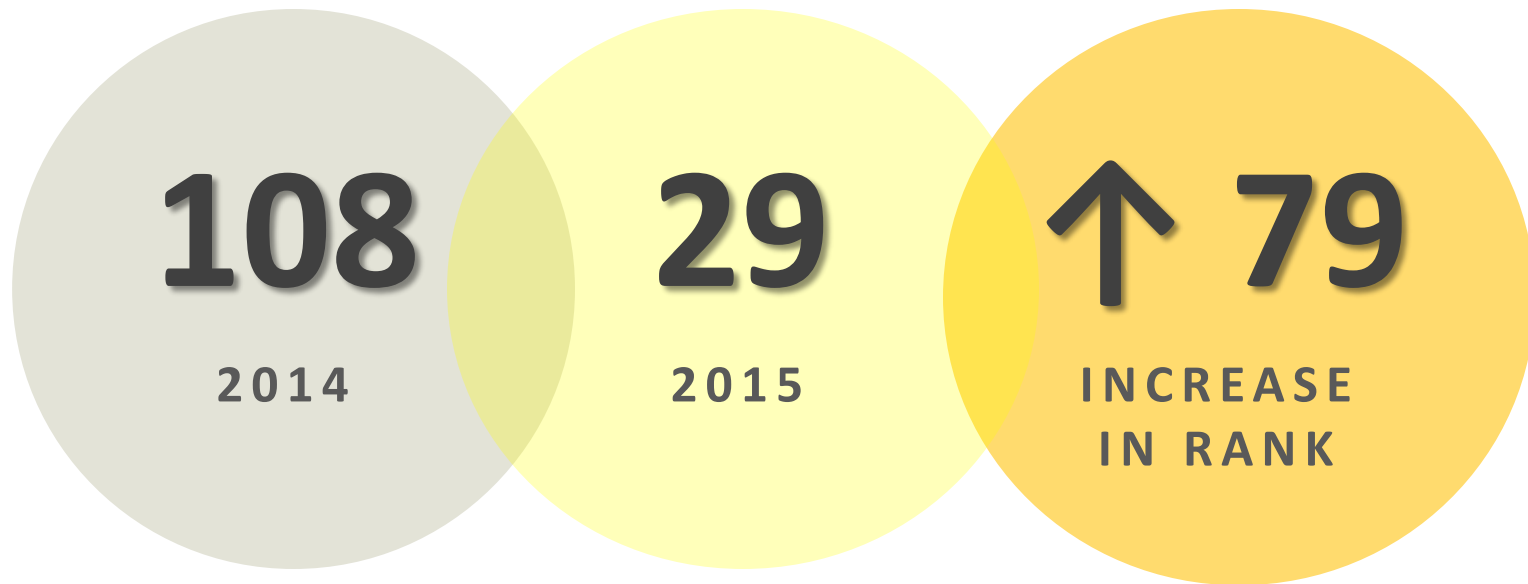
RESULT: LOW HANGING FRUIT

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



Implement reforms in 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




Implement suggested reforms in 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

Building Momentum for Transparency

- Open Government Partnership
- APEC Code of Conduct for Business
- National Competitiveness Council
- Integrity Initiative

Open Government Partnership

- Government + Business + Civil Society
- International partnership. Steering Committee from US, Brazil, Mexico, Norway, UK, South Africa, Indonesia, Philippines
- Time-based Country Action Plan (examples)
 - Disclosure of Budget Information
 - Disclosure of LGU use of funds
 - Online posting of “pork barrel” and lump sum disbursements
 - Open Data (www.data.gov.ph)
 - Social Audit for Public Infrastructure Projects

www.opengovpartnership.org

APEC Code of Conduct for Business

“Corruption is a serious threat to good governance and deters investment...fighting corruption is essential to the development of our economies for the benefit of our people.”

- APEC-wide Business Integrity and Transparency Principles for the Private Sector

www.apec.org

National Competitiveness Council

- Balanced Scorecard and Multisectoral Governance Councils in National Agencies – DPWH, DSWD, Army, PNP, etc.
- “Islands of Good Governance” (externally-audited balanced scorecards)
- LGUs – Business Permits Streamlining / Customer Satisfaction Surveys
- Annual Enterprise Survey on Corruption (SWS)
- City/Municipal Competitiveness Index

Integrity Initiative

- Private Sector + Government
- Integrity Pledge
- Unified Code of Conduct
- Pre-requisite for bids ?

1. ***Transparency leads to Competitiveness*** : Governance matters
2. ***Work-in-Progress is no longer good enough***
3. Importance of ***Execution and Delivery***
4. ***Teamwork is required*** : No More Silos
5. We must *focus on Multiple Fronts* (no single variable)
6. ***The Competition never sleeps***
7. ***The bar always rises.*** We move up a weight class and meet larger, stronger competition
8. ***Speed-to-Reform*** should be our new mantra
9. ***Maintaining Momentum*** is important (gain speed)
10. ***Embedding and institutionalizing change*** / reform for the long run is important. This has become a key concern.

Public – Private Collaboration is important and effective. We learn from each other.



- Where have we succeeded ?

GOVERNANCE

- Where have we fallen behind ?

BUREAUCRACY

- How do we move forward ?

ON TIME EXECUTION

- How do we build a Culture of Competitiveness ?

STATE OF MIND





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