



NATIONAL  
COMPETITIVENESS  
COUNCIL | PHILIPPINES



# Connectivity Competitiveness Index

March 9, 2017

National Telecommunications Summit, PICC

**Guillermo M. Luz** | Co-Chairman

# GLOBAL COMPETITIVENESS REPORT CARD

REPORT	2010/2011	2016/2017	GOAL (Top 3rd)	CHANGE 4 to 6 yrs
1. Doing Business Report (IFC)	148/183	99/189	63	↑ 49
2. Economic Freedom Index (HF)*	115/179	58/180*	60	↑ 57
3. Corruption Perceptions Index (TI)	134/178	101/175	58	↑ 33
4. Global Competitiveness Index (WEF)	85/139	57/138	47	↑ 28
5. Global Enabling Trade Index (WEF)	92/125	64/138	46	↑ 28
6. Travel and Tourism Report (WEF)	94/139	74/141	46	↑ 20
<b>7. WIPO- Global Innovation Index (WIPO)</b>	<b>91/125</b>	<b>74/128</b>	<b>47</b>	<b>↑ 17</b>
<b>8. Global Information Technology Report (WEF)</b>	<b>86/138</b>	<b>77/139</b>	<b>46</b>	<b>↑ 9</b>
<b>9. E-Government Index (UN)</b>	<b>78/184</b>	<b>71/193</b>	<b>64</b>	<b>↑ 7</b>
10. Fragile States Index (FFP) **	50/177	54/178	118	↑ 4
11. Global Gender Gap Report (WEF)	9/142	<b>7/144</b>	47	↑ 2
12. World Competitiveness Report (IMD)	41/59	42/60	20	↓ 1
13. Logistics Performance Index (WB)	44/155	71/160	53	↓ 27

REACHED THE TOP THIRD

LATEST PERFORMANCE











UPGRADE

DOWNGRADE

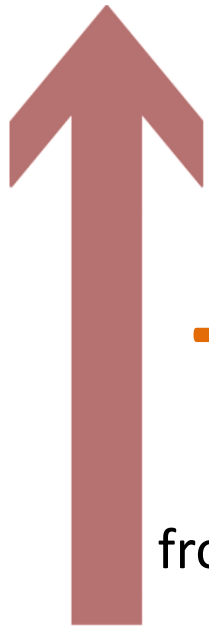
\*with 2017 Results, \*\*reverse ranking (1 as worst)

# GLOBAL COMPETITIVENESS REPORT

## PHILIPPINES and ASEAN

Country/Economy	2016 (out of 138)	2015 (out of 140)	2014 (out of 144)	2013 (out of 148)	2012 (out of 144)	2011 (out of 142)	2010 (Out of 139)	Change 2015-2016	Change 2010-2016
 Singapore	2	2	2	2	2	2	3	0	1
 Malaysia	25	18	20	24	25	21	26	-7	1
 Thailand	34	32	31	37	38	39	38	-2	4
 Indonesia	41	37	34	38	50	46	44	-4	3
 Philippines	<b>57</b>	<b>47</b>	<b>52</b>	<b>59</b>	<b>65</b>	<b>75</b>	<b>85</b>	<b>5</b>	<b>28</b>
 Vietnam	60	56	68	70	75	65	59	-4	-1
 Lao PDR	93	83	93	81	n/a	n/a	n/a	10	-12
 Cambodia	89	90	95	88	85	97	109	1	20
 Myanmar	---	131	134	139	n/a	n/a	n/a	--	--
 Brunei Darussalam	58	n/a	n/a	26	28	28	28	--	-30

# Top 4 Gains Since 2010/11



**+57**

**No. 58**  
from No. 115

**ECONOMIC  
FREEDOM  
INDEX**



**+49**

**No. 99**  
from No. 148

**DOING  
BUSINESS  
REPORT**



**+33**

**No. 101**  
from No. 134

**CORRUPTION  
PERCEPTION  
INDEX**



**+28**

**No. 57**  
from No. 85

**GLOBAL  
COMPETITIVENESS  
REPORT**



# EASE OF DOING BUSINESS

PROCESS IMPROVEMENT FOCUS

# PHILIPPINES vs ASEAN (2016-2017)

ASEAN		2017 REPORT (190 economies)	2016 REPORT (189 economies)	Change 2016-2017
1	Singapore	2	1	↓ 1
2	Malaysia	23	18	↓ 5
3	Thailand	46	49	↑ 3
4	Vietnam	82	90	↑ 8
5	Brunei Darussalam	72	84	↑ 12
6	Indonesia	91	109	↑ 18
<b>7</b>	<b>Philippines</b>	<b>99</b>	<b>103</b>	<b>↑ 4</b>
8	Cambodia	131	127	↓ 4
9	Lao PDR	139	134	↓ 5
10	Myanmar	170	167	↓ 3

UPGRADE

DOWNGRADE

Source: Published DB reports (2016-2017)

# PHILIPPINES DOING BUSINESS INDICATORS (2016-2017)

INDICATORS	2017 REPORT (190 economies)	2016 REPORT (189 economies)	Change 2016-2017
<b>OVER-ALL RANKING</b>	<b>99</b>	<b>103</b>	<b>↑ 4</b>
1. Starting a Business	171	165	↓ 6
2. Dealing w/ Construction Permits	85	99	↑ 14
3. Getting Electricity	22	19	↓ 3
4. Registering Property	112	112	--
5. Getting Credit	118	109	↓ 9
6. Protecting Investors	137	155	↑ 18
7. Paying Taxes	115	126	↑ 11
8. Trading Across Borders	95	95	--
9. Enforcing Contracts	136	140	↑ 4
10. Resolving Insolvency	56	53	↓ 3

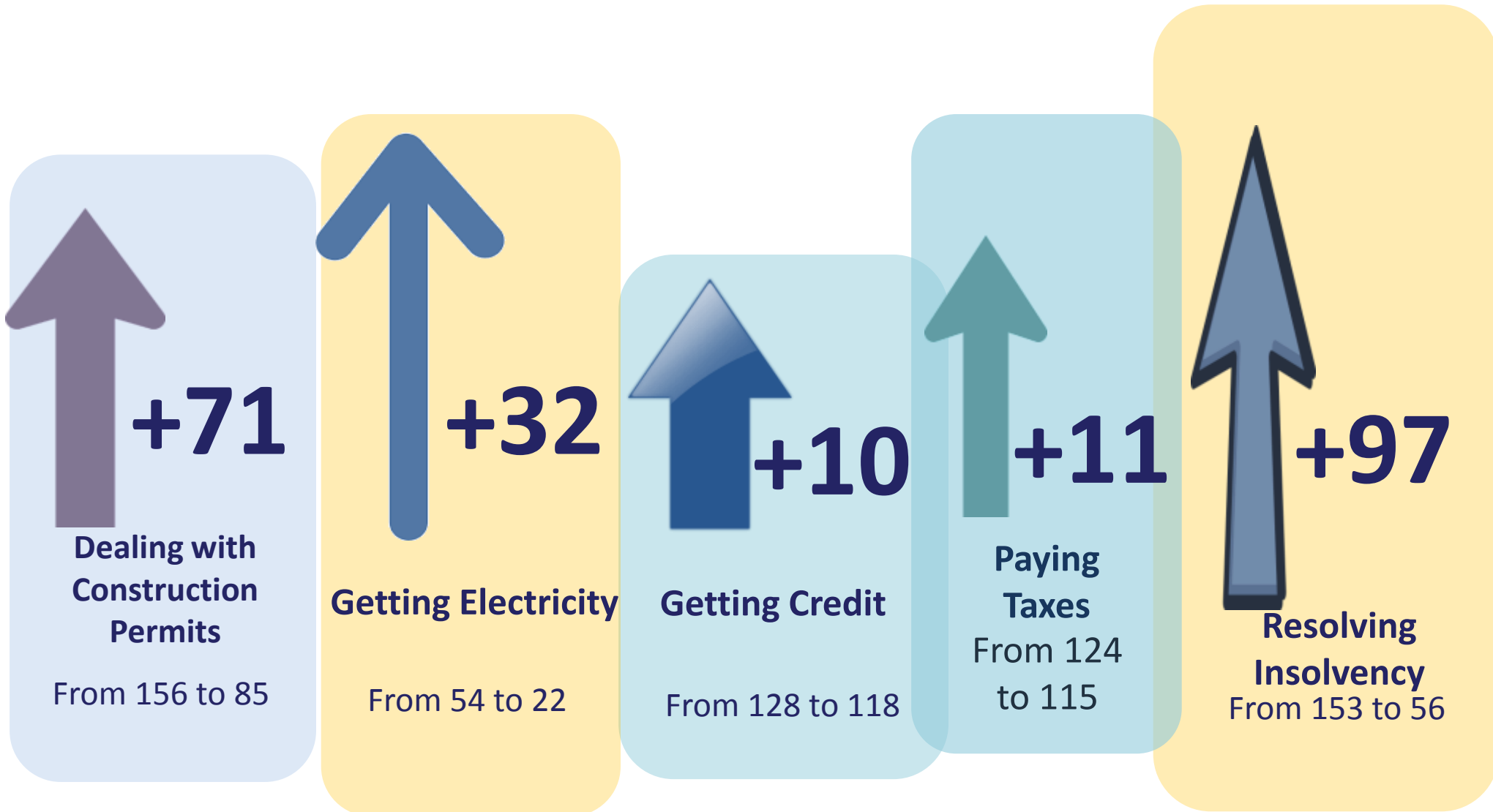
UPGRADE

DOWNGRADE

Source: Published DB reports (2016-2017)

# UPGRADES

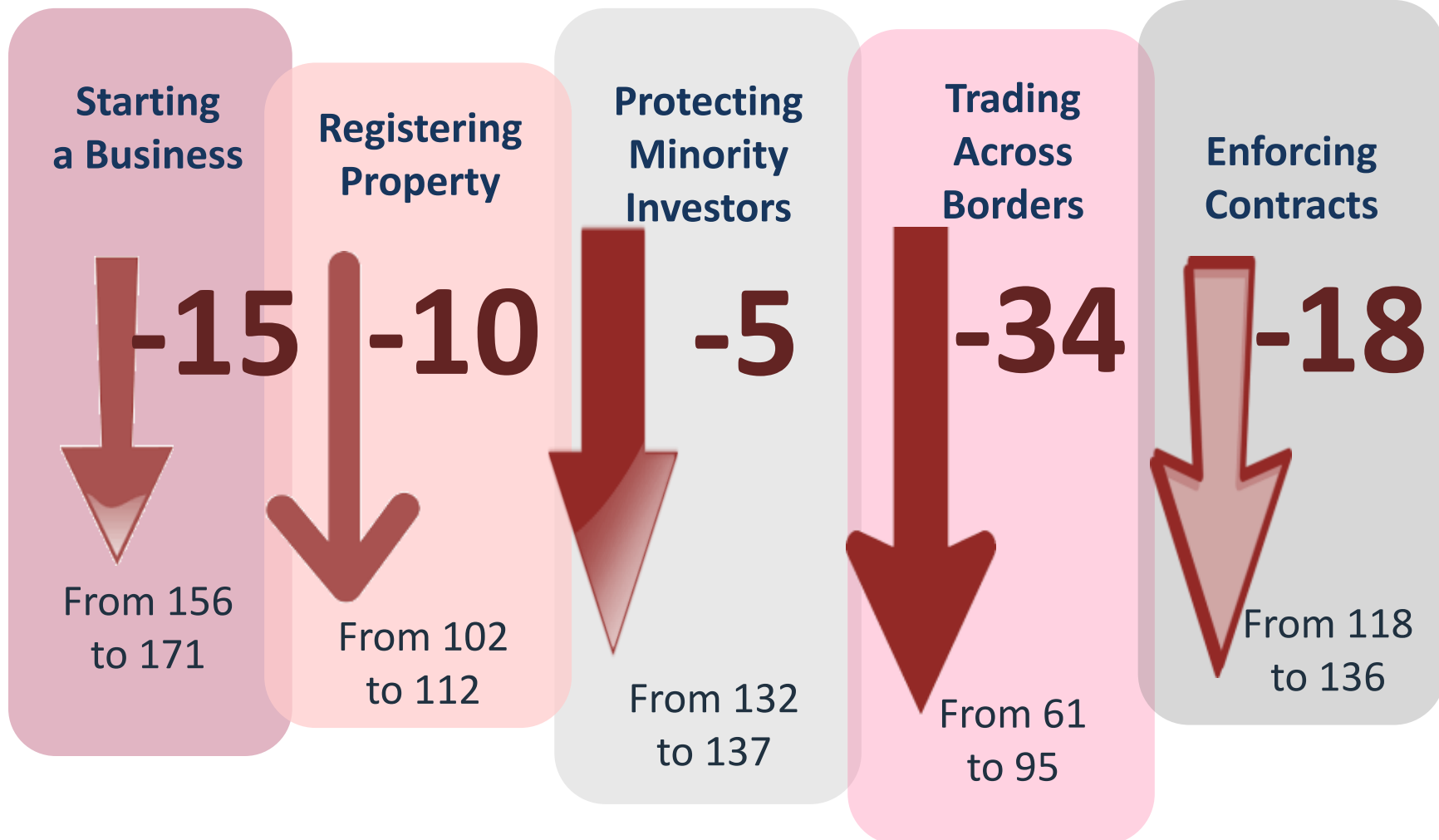
## Philippine Rankings (2011-2017)





# DOWNGRADES

## Philippine Rankings (2011-2017)



# GOVERNMENT ONLINE


AUTOMATION

# Why go online ?

Many NGA and LGU licenses and permits are :


- Paper-based; use multiple, identical forms
- Require manual application
- Require manual processing
- Over-the-counter transactions
- Take place in multiple offices in different locations
- Take too long

# The Goal

- Ability to file applications online, anytime, anywhere.
  - Online payment via credit card, debit payments, mobile cash, any form of online payment. Payments can be credited to appropriate agency.
  - License or permit can be issued electronically by agency, where appropriate.
  - Online kiosks to be provided in government offices to accommodate those without access to computers.
- 

# Getting Started

## Priority Permits to Take Online or Automate

- Incorporation : Starting a Business
  - Business (Mayor's) Permits
  - Construction Permits
  - Occupancy Permits
  - Fire Safety Inspection Certificates (FSIC)
  - Other local permits
  - National Single Window
  - National Quality Infrastructure (FDA, BPS, DA)
  - Note : permits for Individuals
- 



# Global Information Technology Report





***The Global Information Technology Report 2016*** features the latest iteration of the Networked Readiness Index, which assesses the factors, policies and institutions that enable a country to fully leverage information and communication technologies (ICTs) for increased competitiveness and well-being.

# Global Information Technology Report

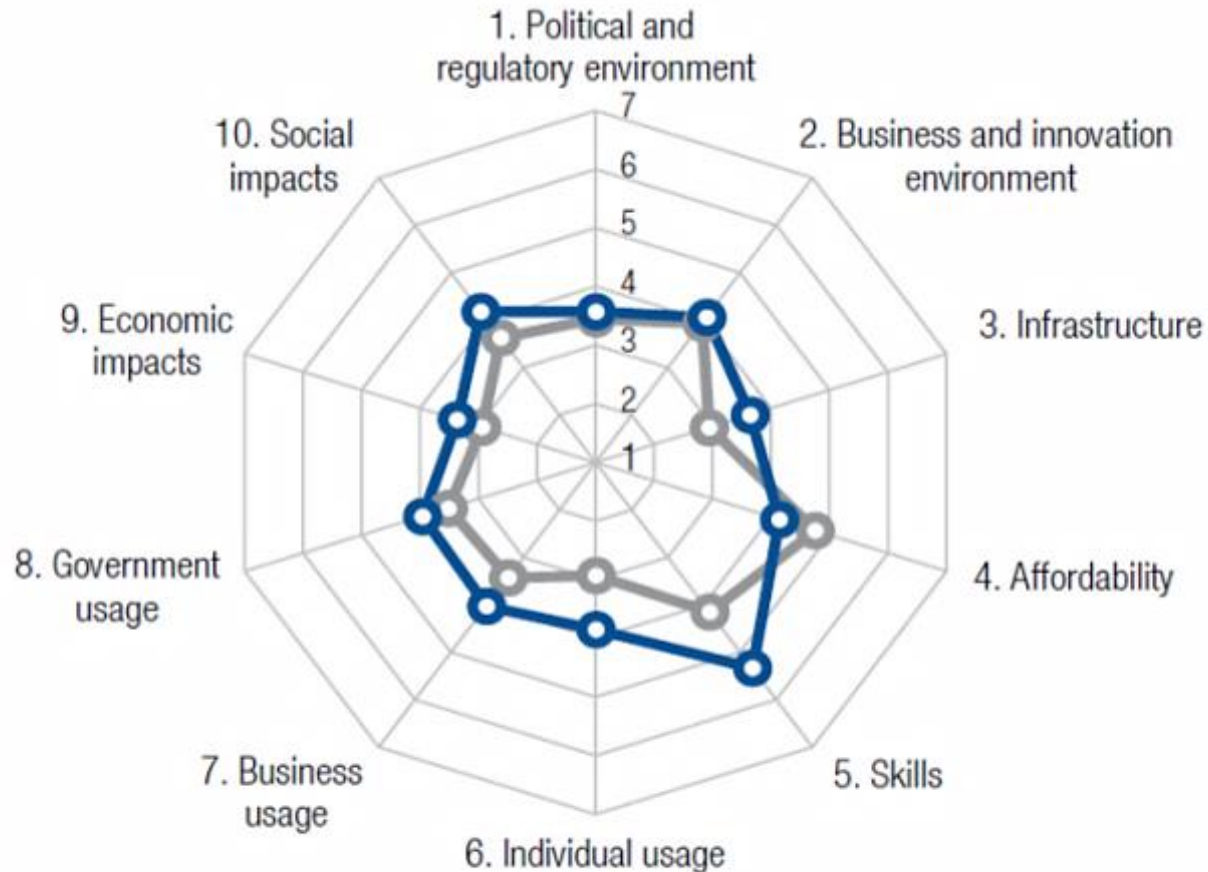
## Philippines vs ASEAN (2011-2016)

Economy	2016 (out of 139)	2015 (out of 143)	2014 (out of 148)	2013 (out of 144)	2012 (out of 142)	2011 (out of 138)	Change 2015-2016	Change 2011-2016
Singapore	1	1	2	2	2	2	0	1
Malaysia	31	32	30	30	29	28	1	-3
Thailand	62	67	67	74	77	59	5	-3
Indonesia	73	79	64	76	80	53	6	-20
<b>Philippines</b>	<b>77</b>	<b>76</b>	<b>78</b>	<b>86</b>	<b>86</b>	<b>86</b>	<b>-1</b>	<b>9</b>
Vietnam	79	85	84	84	83	55	6	-24
Lao PDR	104	97	109	n/a	n/a	n/a	-7	5
Cambodia	109	110	108	106	108	111	1	2
Myanmar	133	139	146	n/a	n/a	n/a	6	13
Brunei Darussalam	n/a	n/a	45	57	54	57	n/a	n/a

Data Source: Global Information Technology Report



# Performance Overview (2016)



*Data Source: Global Information Technology Report*

—○— Philippines

—○— Lower-middle-income group average

# Global Information Technology Report Philippines (2011-2016)

INDICATORS		2016	2015	2014	2013	2012	2011
		Indicators	Indicators	Indicators	Indicators	Indicators	Indicators
RED	Bottom 20%	112th to 139th	116th to 143rd	119th to 148th	115th to 144th	113th to 142nd	104th to 129th
		3	4	3	3	6	14
PURPLE	Ranked 21 - 40%	83rd to 111th	87th to 115th	88th – 118th	86th – 114th	85th – 112th	79th – 103rd
		13	8	8	18	19	13
GREEN	Ranked 41 – 50%	69th to 82nd	86th to 71st	72rd – 87th	72nd – 85th	71st – 84th	64th – 79th
		13	8	18	13	11	7
BLACK	Ranked 49% or higher	1st to 68th	1st to 70th	1st – 71st	1st – 71st	1st – 70th	1st – 63th
		24	32	24	21	17	10
<b>TOTAL</b>		<b>53</b>	<b>52</b>	<b>53</b>	<b>55</b>	<b>53</b>	<b>44</b>

*Data Source: Global Information Technology Report*



# United Nations: E-Government Survey



# United Nations E-Government Survey

- Systematic assessment of use and potential of ICT to transform the public sector by enhancing efficiency, effectiveness, transparency, accountability, access to public services and citizen participation.

## E-Government Development Index

- Weighted average of scores on three most important dimensions : scope and quality of online services (Online Service Index, OSI), status of the development of telecommunication infrastructure (Telecommunication Infrastructure Index, TII) and inherent human capital (Human Capital Index, HCI).

*Data Source: UN e-Government Survey*

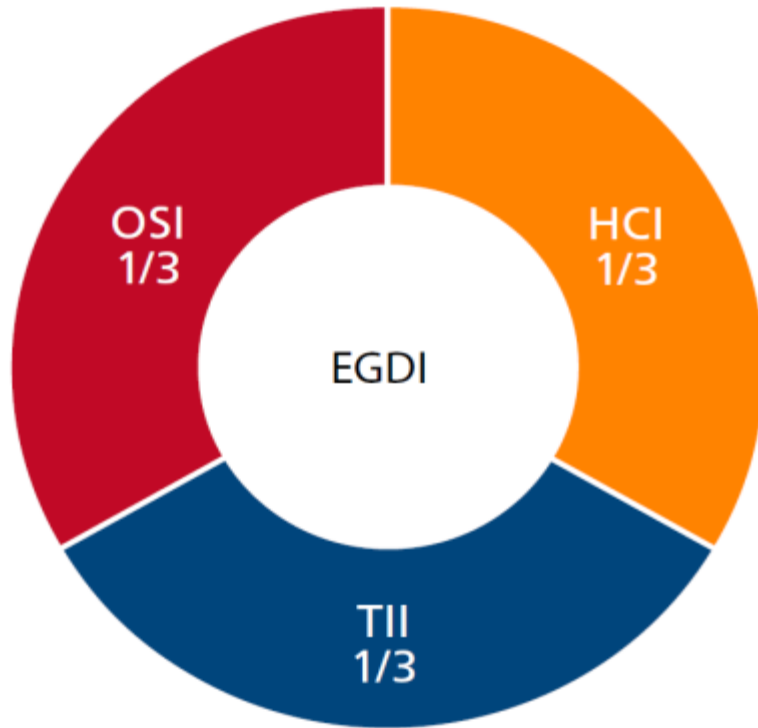
# e-Participation Index

**e-Information** - Enabling participation by providing citizens with public information and access to information without or upon demand.

**e-Consultation** - Engaging citizens in contributions to and deliberation on public policies and services.

**e-Decision-Making** - Empowering citizens through co-design of policy options and coproduction of service components and delivery modalities.

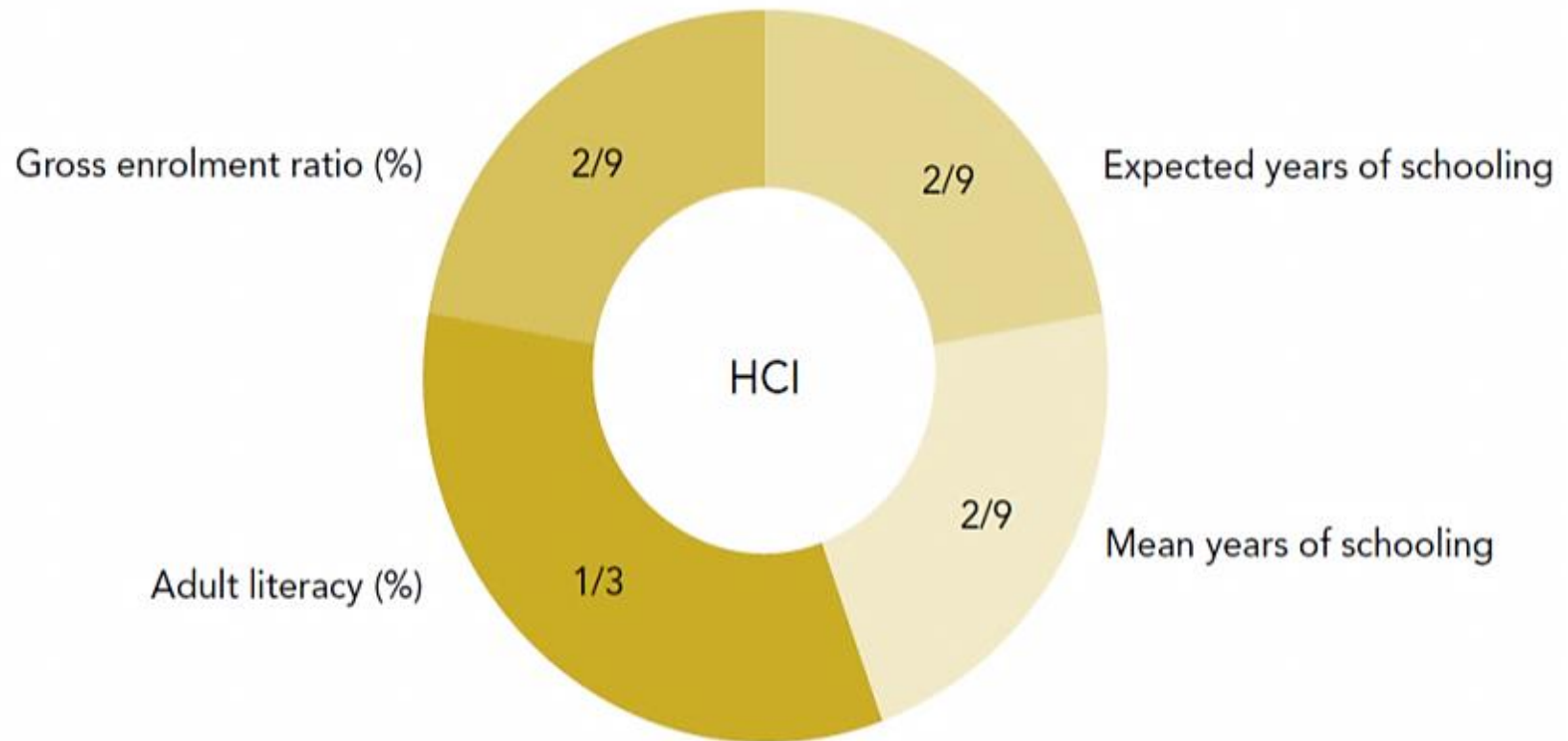
# 3 Dimensions of EGDI



- OSI—Online Service Index
- TII—Telecommunication Infrastructure Index
- HCI—Human Capital Index

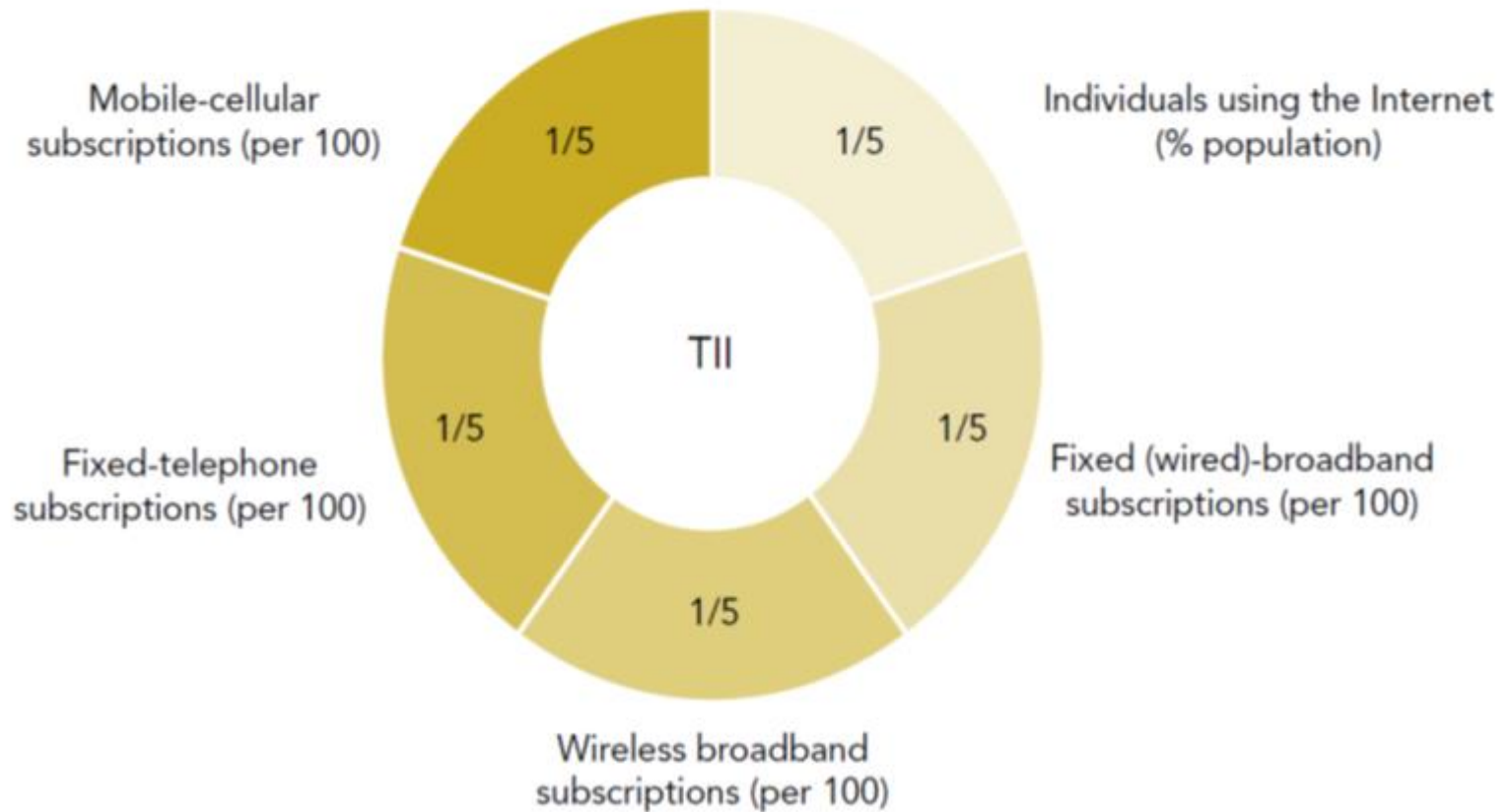
*Data Source: UN e-Government Survey*

# Human Capital Index



*Data Source: UN e-Government Survey*

# Telecommunications Infrastructure Index



*Data Source: UN e-Government Survey*



# Philippines vs ASEAN 2010-2016



# UN eGOVERNMENT SURVEY: 2010-2016 PHILIPPINES and ASEAN

Economy	2016 out of 193	2014 out of 193	2012 out of 193	2010 out of 192	Change 2014-2016	Change 2010-2016
Singapore	4	3	10	11	-1	8
Malaysia	60	52	40	32	-8	-20
<b>Philippines</b>	<b>71</b>	<b>95</b>	<b>88</b>	<b>78</b>	<b>24</b>	<b>7</b>
Brunei Darussalam	83	86	54	68	3	-18
Vietnam	89	99	83	90	10	-9
Thailand	77	102	92	76	25	-26
Indonesia	116	106	97	109	-10	3
Lao PDR	148	152	153	151	4	-1
Cambodia	158	139	155	140	-19	1
Myanmar	169	175	160	141	6	-34

*Data Source: UN e-Government Survey*

# e-Participation Index

## 2010-2016 PHILIPPINES and ASEAN

Economy	2016 out of 193	2014 out of 193	2012 out of 193	2010 out of 192	Change 2014-2016	Change 2010-2016
Singapore	8	10	3	9	2	1
Viet Nam	43	65	101	110	22	67
Malaysia	47	59	31	12	12	-35
<b>Philippines</b>	<b>67</b>	<b>51</b>	<b>66</b>	<b>64</b>	<b>-16</b>	<b>-3</b>
Thailand	67	54	48	110	-13	43
Brunei Darussalam	114	179	34	68	65	-46
Indonesia	114	110	66	86	-4	-28
Lao People's Democratic Republic	133	137	161	86	4	-47
Myanmar	170	172	161	180	2	10
Cambodia	179	137	161	97	-42	-82

Data Source: UN e-Government Survey

# Online Service Index (OSI)

## 2010-2016 PHILIPPINES and ASEAN

Economy	2016 out of 193	2014 out of 193	2012 out of 193	2010 out of 192	Change 2014-2016	Change 2010-2016
Singapore	3	2	3	10	-1	7
Malaysia	40	31	31	16	-9	-24
<b>Philippines</b>	<b>52</b>	<b>67</b>	<b>66</b>	<b>49</b>	<b>15</b>	<b>-3</b>
Viet Nam	74	81	101	79	7	5
Thailand	79	75	48	67	-4	-12
Brunei Darussalam	85	94	34	88	9	3
Indonesia	115	94	66	102	-21	-13
Lao People's Democratic Republic	133	153	161	156	20	23
Myanmar	160	182	161	154	22	-6
Cambodia	183	142	161	135	-41	-48

Data Source: UN e-Government Survey

# Human Capital Index (HCI)

## 2010-2016 PHILIPPINES and ASEAN

Economy	2016 out of 193	2014 out of 193	2012 out of 193	2010 out of 192	Change 2014-2016	Change 2010-2016
Singapore	34	34	57	48	0	14
Brunei Darussalam	72	62	75	67	-10	-5
Malaysia	93	96	109	96	3	3
Thailand	95	118	104	66	23	-29
<b>Philippines</b>	<b>101</b>	<b>99</b>	<b>66</b>	<b>78</b>	<b>-2</b>	<b>-23</b>
Indonesia	103	109	93	97	6	-6
Viet Nam	127	127	116	114	0	-13
Lao People's Democratic Republic	149	151	150	140	2	-9
Myanmar	153	142	127	127	-11	-26
Cambodia	156	148	144	135	-8	-21

Data Source: UN e-Government Survey

# Telecommunication Infrastructure Index 2010-2016 PHILIPPINES and ASEAN

Economy	2016 out of 193	2014 out of 193	2012 out of 193	2010 out of 192	Change 2014-2016	Change 2010-2016
Singapore	3	4	23	14	1	11
Malaysia	70	67	57	52	-3	-18
Thailand	77	107	103	94	30	17
<b>Philippines</b>	<b>87</b>	<b>114</b>	<b>110</b>	<b>118</b>	<b>27</b>	<b>31</b>
Viet Nam	90	84	69	79	-6	-11
Brunei Darussalam	97	85	54	65	-12	-32
Indonesia	109	101	118	116	-8	7
Cambodia	118	128	154	166	10	48
Lao People's Democratic Republic	149	141	150	162	-8	13
Myanmar	183	192	193	190	9	7

*Data Source: UN e-Government Survey*

**we  
are.  
social**

# DIGITAL IN 2017





# PHILIPPINES

## A snapshot of the country's Digital and Social Statistical Indicators

**103 Million**  
TOTAL Population



**60 Million**  
Internet Users



**60 Million**  
Social Media Users  
*(all platforms)*



**124.4 Million**  
Mobile Subscriptions

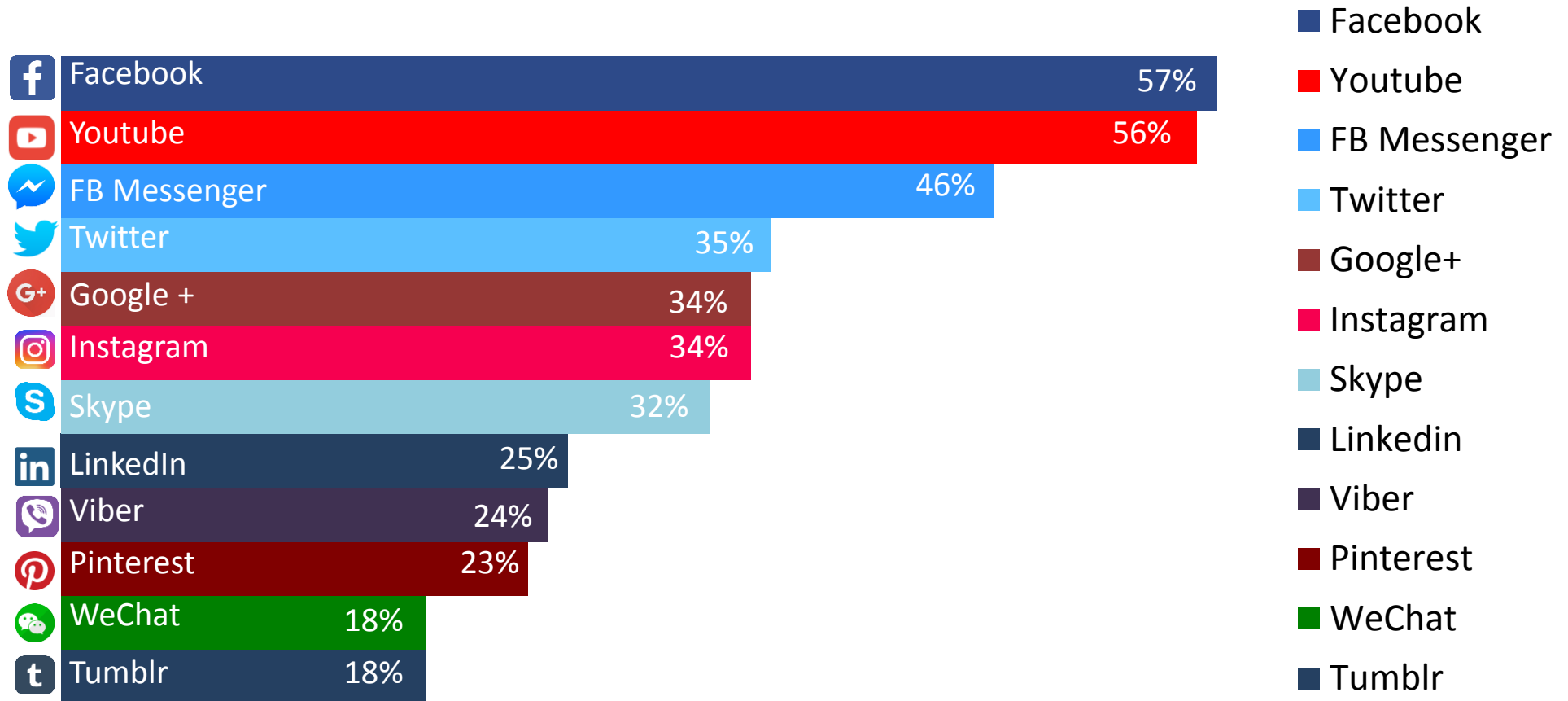


**54 Million**  
Active Mobile Social Users  
*(Mobile Phone Users)*





# Most Active Social Media Platforms

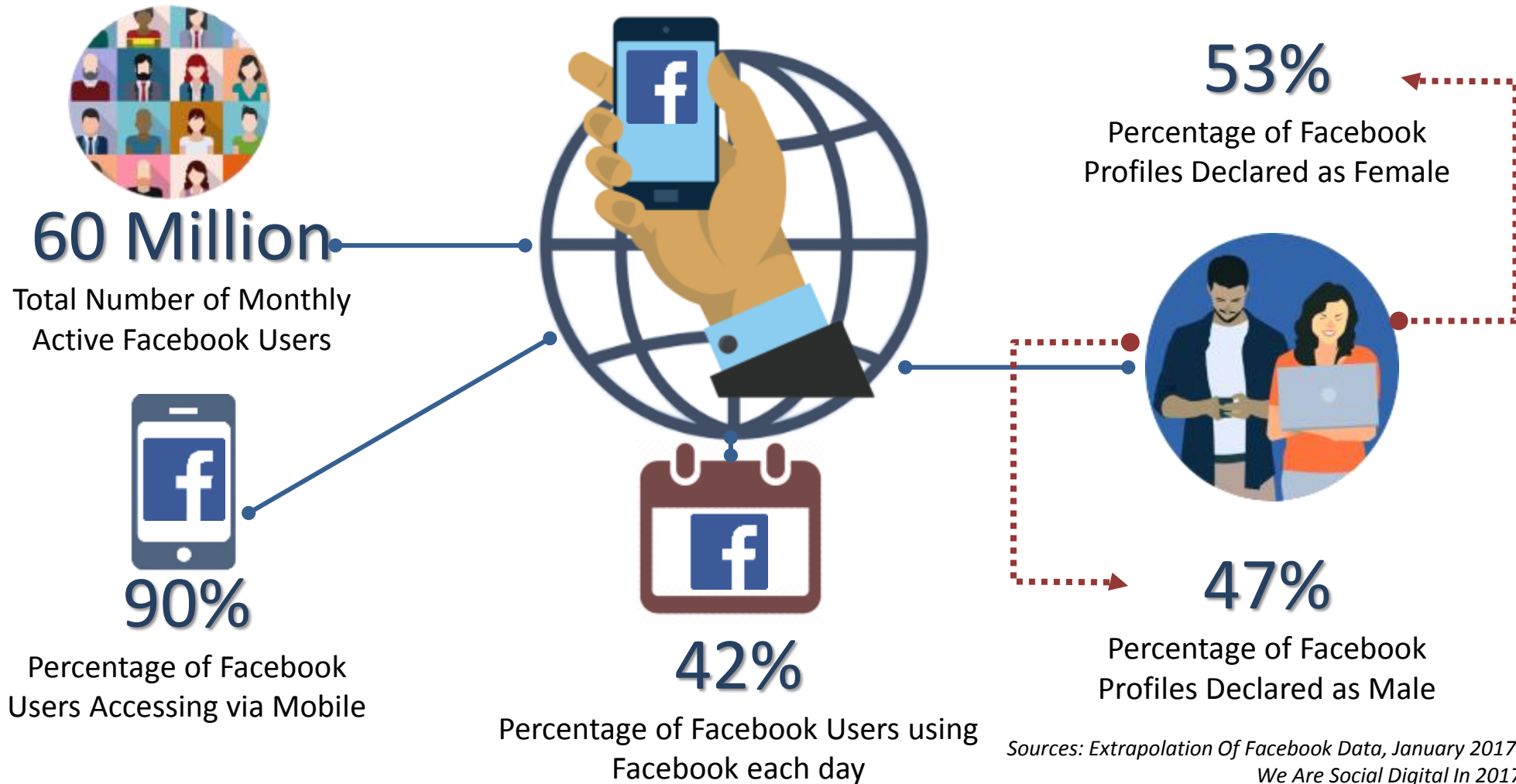


Data Source: Globalwebindex, Q3 & Q4 2016  
We Are Social Digital in 2017



# Facebook Usage Analysis

A breakdown of Facebook users by device, frequency of use, and gender of user.





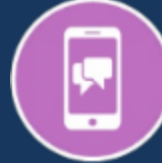


Sources: Extrapolation Of Facebook Data, January 2017.  
We Are Social Digital In 2017





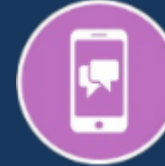
# Philippines vs ASEAN



# Snapshot of ASEAN's key digital indicators

Country	 Total Population	 Internet Users	 Active Social Media Users	 Mobile Subscriptions	 Active Mobile Social Users
<i>In Million</i>					
Brunei	0.43M	0.37M	0.37M	0.52M	0.33M
Cambodia	15.95M	7.16M	4.9M	27.60M	4.4M
Indonesia	262M	132.7M	106M	371.40M	92M
Laos	6.98 M	1.8M	1.8M	5.95M	1.5M
Malaysia	30.96M	22M	22M	42.93M	20M
Myanmar	54.6M	14M	14M	50.56M	13M
Philippines	<b>103.M</b>	<b>60M</b>	<b>60M</b>	<b>129.4</b>	<b>54M</b>
Singapore	5.74M	4.71M	4.4M	8.44M	4M
Thailand	68.22M	46M	46M	90.94M	42M
Vietnam	94.93M	50.05M	46M	124.7M	41M

# Snapshot of ASEAN's key digital indicators

Country										
	Total Population		Internet Users		Active Social Media Users		Mobile Subscriptions		Active Mobile Social Users	
	In Million	Urbanization %	In Million	Penetration %	In Million	Penetration %	In Million	Penetration %	In Million	Penetration %
Brunei	0.43M	76%	0.37M	86%	0.37M	86%	0.52M	119%	0.33M	76%
Cambodia	15.95M	21%	7.16M	45%	4.9M	31%	27.60M	173%	4.4M	28%
Indonesia	262M	55%	132.7M	51%	106M	40%	371.40M	142%	92M	35%
Laos	6.98 M	34%	1.8M	26%	1.8M	26%	5.95M	85%	1.5M	21%
Malaysia	30.96M	76%	22M	71%	22M	71%	42.93M	139%	20M	65%
Myanmar	54.6M	35%	14M	26%	14M	26%	50.56M	93%	13M	24%
Philippines	<b>103.M</b>	<b>44%</b>	<b>60M</b>	<b>58%</b>	<b>60M</b>	<b>58%</b>	<b>129.4</b>	<b>126%</b>	<b>54M</b>	<b>52%</b>
Singapore	5.74M	100%	4.71M	82%	4.4M	77%	8.44M	147%	4M	70%
Thailand	68.22M	52%	46M	62%	46M	67%	90.94M	133%	42M	62%
Vietnam	94.93M	31%	50.05M	53%	46M	48%	124.7M	131%	41M	43%

Number of Mobile  
Network Operators/  
Number of Cell Sites



Country	List Mobile Network Operators	No. of Mobile Network Operators	No. of Cell Sites/Towers
<b>Philippines</b>	PLDT, Globe Telecom, NOW Telecom (Next Mobile), BellTel, MVNOs	4+	16,300
<b>Indonesia</b>	Telkomsel, Indosat Ooredoo, PT Hutchison 3 Indonesia, XL Axiata, Smartfren, Bakrie Telecom (BTEL), Sampoerna Telekomunikasi Indonesia (STI)/Ceria, Internux (Bolt!)	8	86,322
<b>Malaysia</b>	Celcom Axiata, Maxis Communications, Digi Communications, U Mobile, MVNOs	4+	22,117
<b>Vietnam</b>	Viettel, MobiFone, VNPT-Vinaphone, Vietnamobile, Gmobile, MVNOs	5+	70,000
<b>Thailand</b>	Advanced Info Service (AIS), DTAC, TrueMove, Telephone Organization of Thailand Corp (TOT), Communications Authority of Thailand (CAT), TT&T, Jas Mobile, MVNOs	7+	52,483

Country	List Mobile Network Operators	No. of Mobile Network Operators	No. of Cell Sites/Towers
<b>Singapore</b>	Singapore Telecom (SingTel), StarHub, MobileOne (M1)	3	1,000
<b>Brunei</b>	DSTCom, Progresif Cellular	2	500
<b>Cambodia</b>	Mobitel (CamGSM), Mfone (CamShin), Smart Axiata, AZ Communications, Metfone (Viettel), CadComms (QB), GT-Tell (Excell), Smart Mobile (Latelz), Applifone (Star Cell), Beeline Cambodia (Sotelco), CooTel (Xinwei)	11	9,250
<b>Laos</b>	Unitel, Beeline, ETL, Sky Telecom	4	7,374
<b>Myanmar (Burma)</b>	Myanmar P&T (MPT), Telenor, Ooredoo	3	12030



# Telecommunications Connectivity Award



# The Issue

- Low bandwidth
- Slow speed
- High cost
- Uneven coverage



# The Obstacle

- Too many regulations to construct cell sites
- Takes too long to obtain all permits
- Fees not standardized across LGUs; wide range of fees



# The Award

- LGU with lowest number of permits AND fastest time to process permits
- LGU with most reasonable fees (tbd)
- Permitting process must be passed as an LGU ordinance



# The Benefits

- Attract new/additional telecom investments to LGU; create new jobs in construction
- Better telecom services in LGU
- Attract, generate new businesses in LGU; create more permanent jobs

THANK YOU