

หลักสูตร

รัฐวิสาหกิจกับความสามารถในการแข่งขันของประเทศ

โดย

คุณธีรนนท์ ศรีหงส์

รองกรรมการผู้จัดการอาวุโส

ธนาคารกสิกรไทย จำกัด (มหาชน)

กรรมการอำนวยการ TMA



Agenda

- **Why does competitiveness matter ?**
- **How competitiveness is evaluated?**
- **Where is Thailand in the World Competitiveness rankings?**
- **Thailand in the World Competitiveness Yearbook 2011**

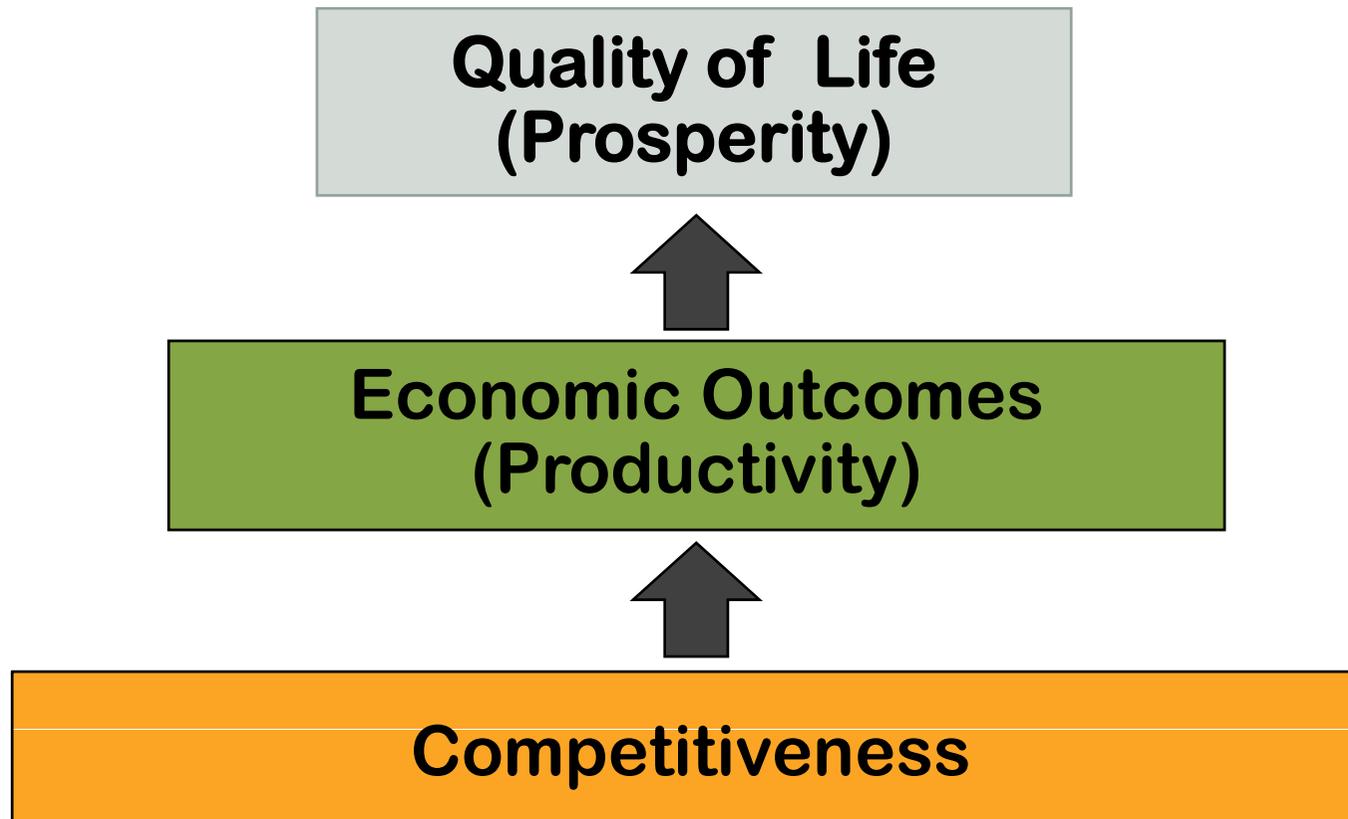
Why does Competitiveness Matter?

Competitiveness matters because...

“Competitiveness is not everything that matters, but without competitiveness everything that matters is much harder to achieve.”

Source: Dr. Christian M. Ketels, Institute for Strategy and Competitiveness, Harvard Business School

Competitiveness Does Matter



Source: Dr. Christian M. Ketels, Institute for Strategy and Competitiveness, Harvard Business School

Japan's New Growth Strategy 2010 – 2020



Korea Model

Wealth of the Nation

Korea 1.0

Heavy Industry

- Ship Building
- Steel
- Chemical

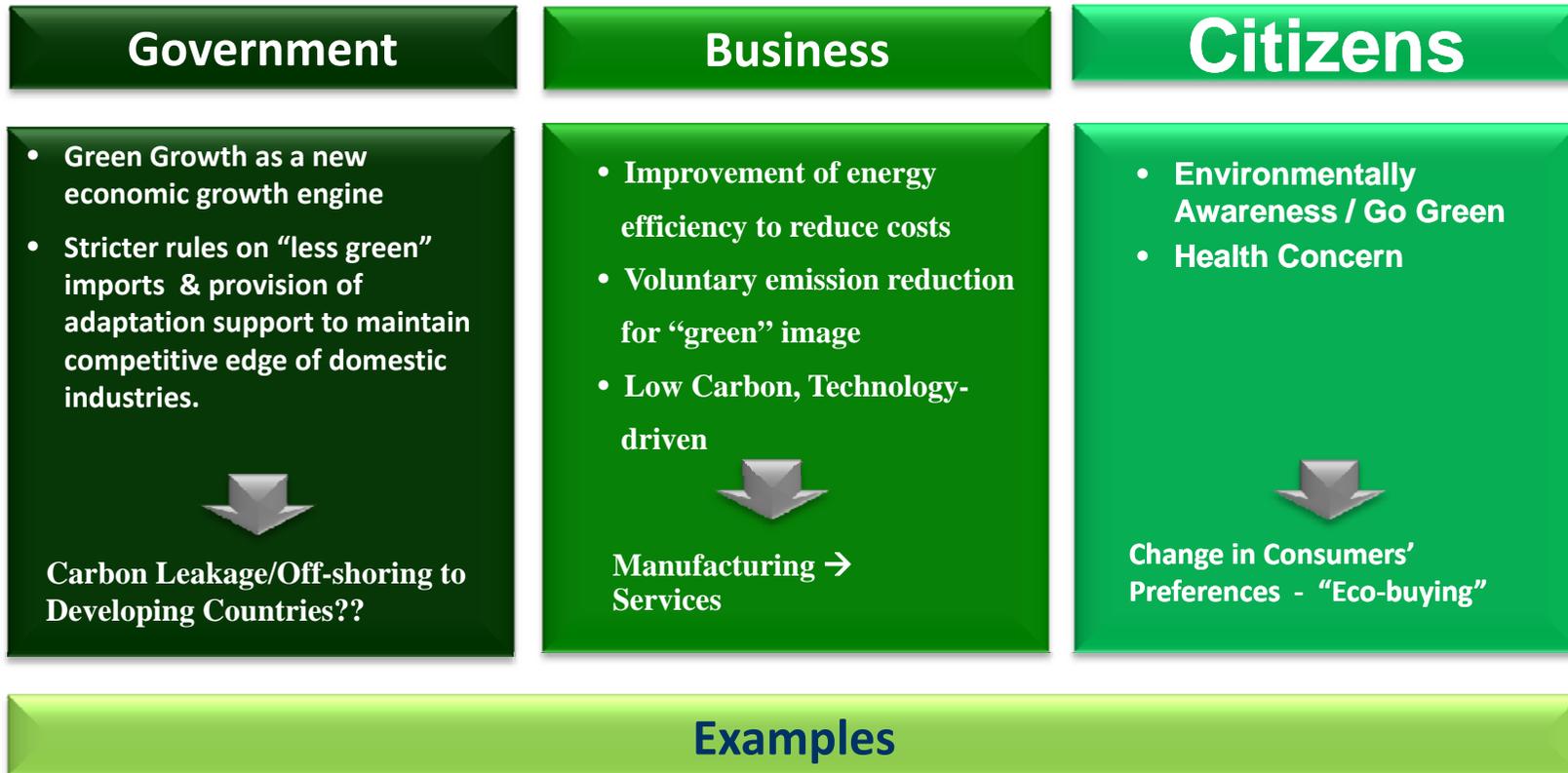
Korea 2.0

- Entertainment Software
- Telecommunications Equipment

Korea 3.0

- Green Technologies
- High-Tech Convergence
- Value Added Service

Transforming towards a Low Carbon Society



- **Korea** → To become the World 7th Green Power by 2010 and 5th by 2050
- **Japan** → Carbon minimization in all sectors
 - Toward a simpler life style that realizes richer quality of life
 - Coexistence with nature
- **The US, the UK, China, India etc.**

Offshore Farming



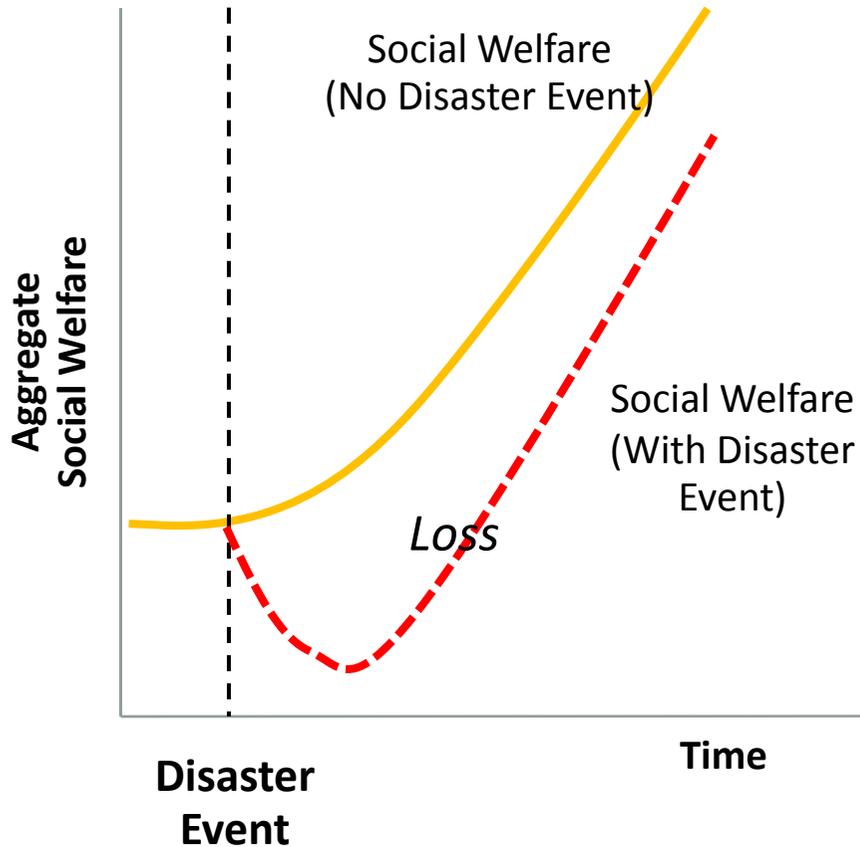
Resource wars – the world will demand 70 percent more food by 2050, outstripping population growth

Cash-rich Arab and Asian governments are buying up arable farmland all over developing world

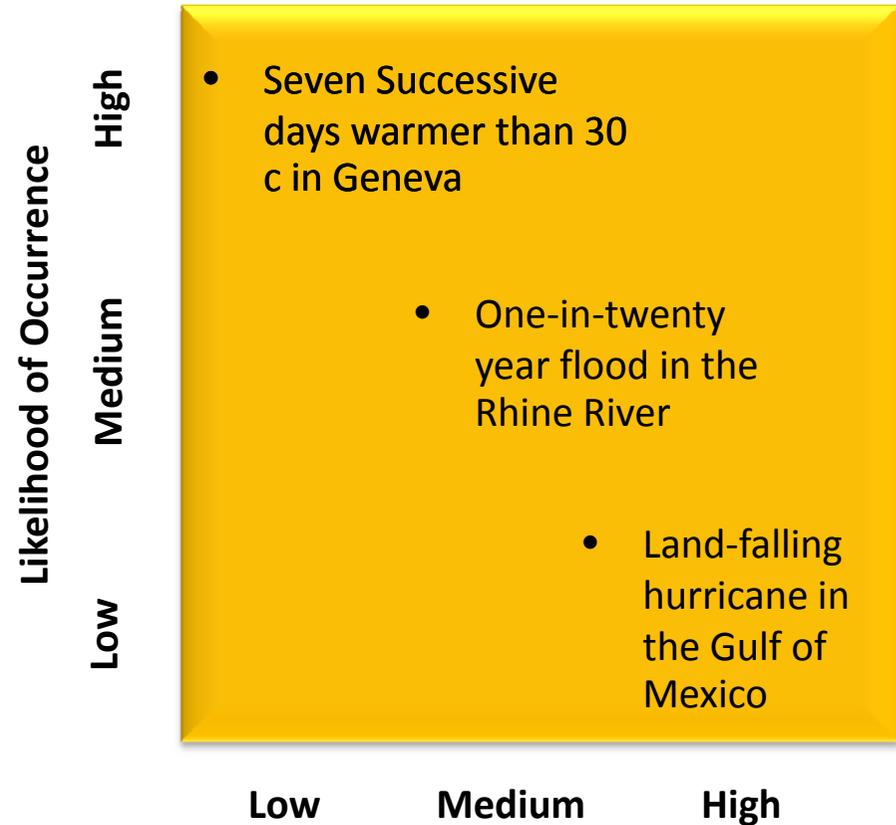
- Chinese businesses are investing in South America and Africa, not only to gain access to commodities, but to get in position to profit from sales to the emerging middle class
- China is also buying up large tracks of land throughout Africa to produce biofuels and to produce food
- India's companies have formed a consortium to invest in corporate farming of oilseeds in Latin America, most notably Uruguay and Paraguay

Managing Risk in the Extreme Environments

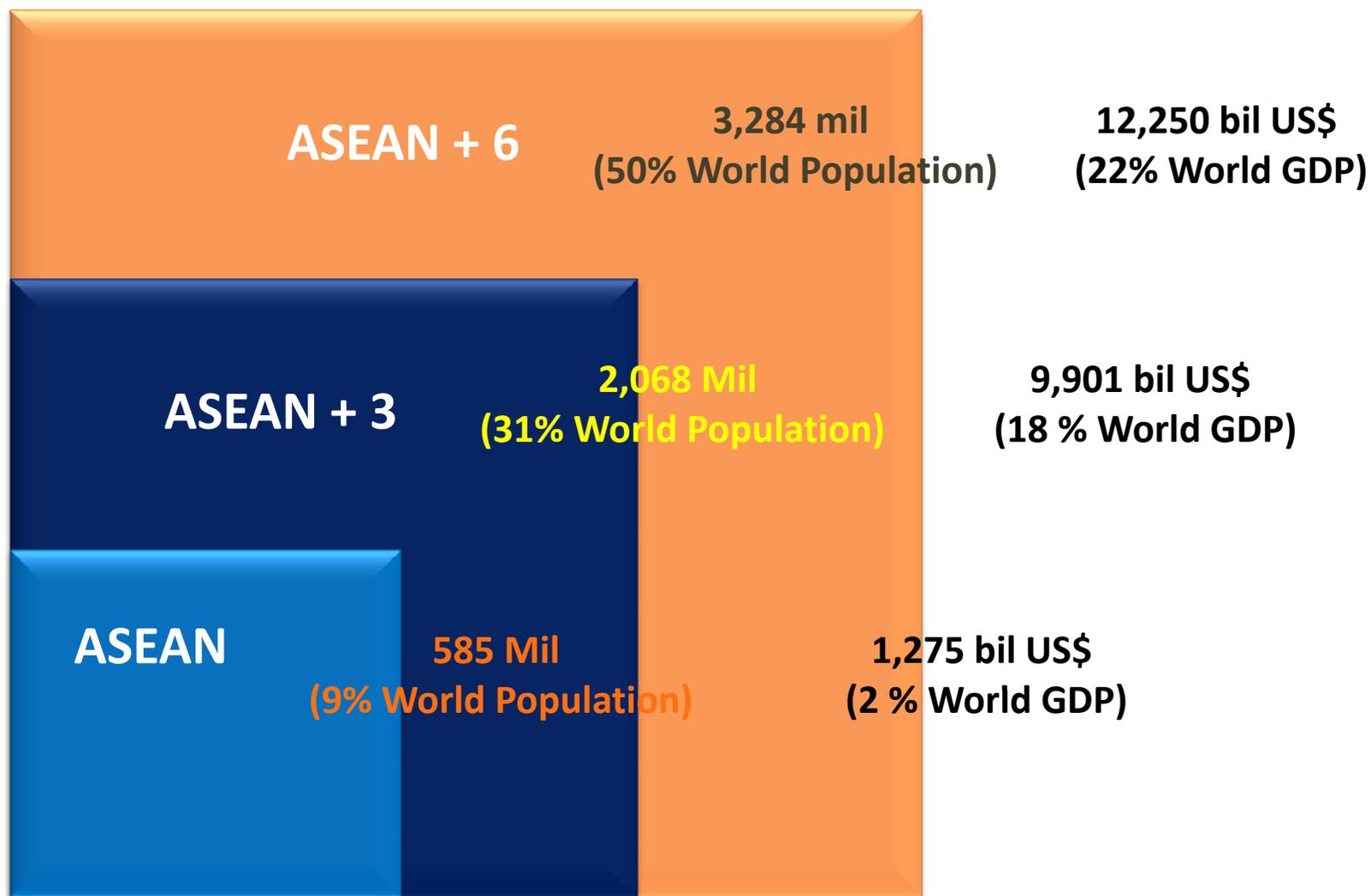
Path of social welfare with/without a disaster event



Risk Assessment Mapping



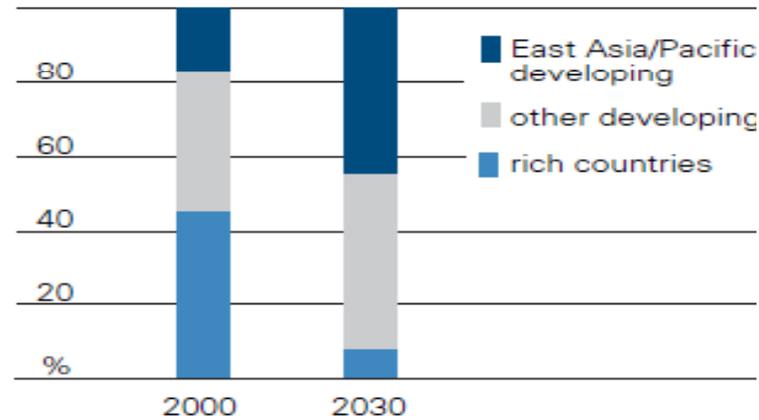
Regional Integration



The Rise of Asian Middle Class

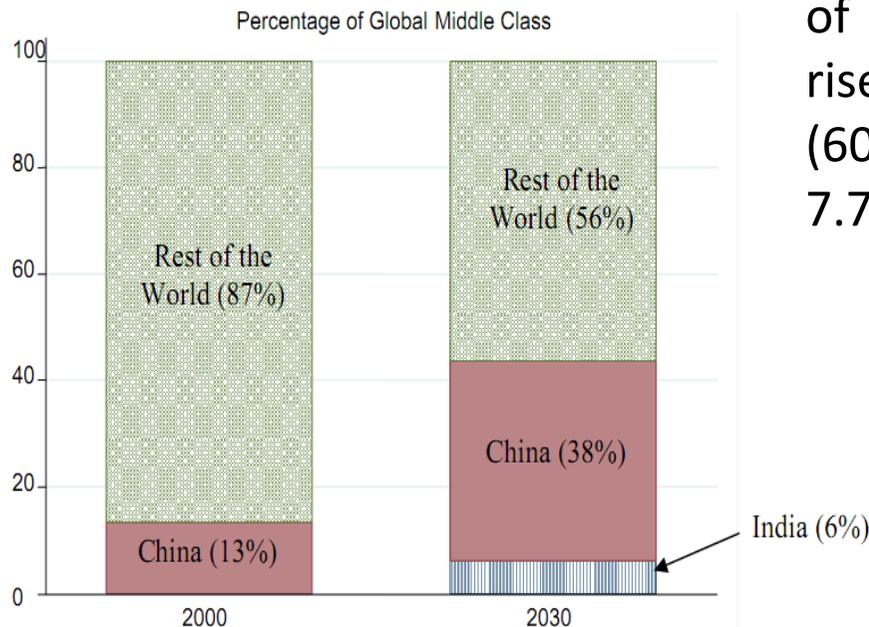
where will the middle class come from?

FIG 2 Origin of global middle class



In 2000, middle class from East Asia and Pacific are estimated to be around one sixth of total global middle class (approx 72 million people) or around 1.4% of global population

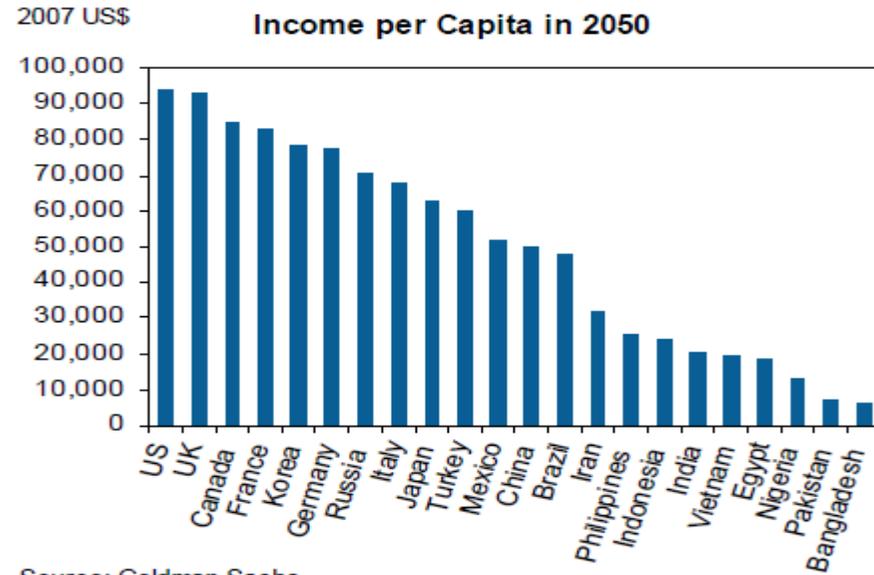
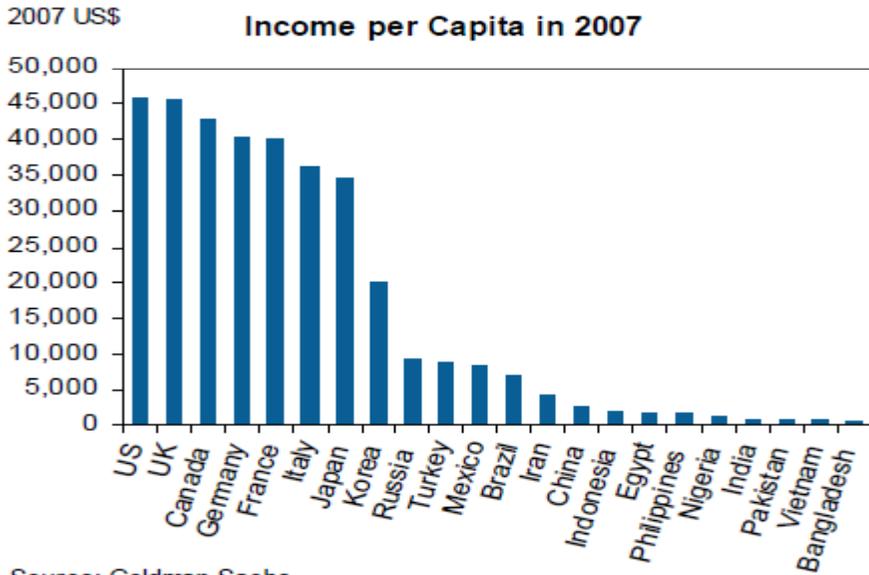
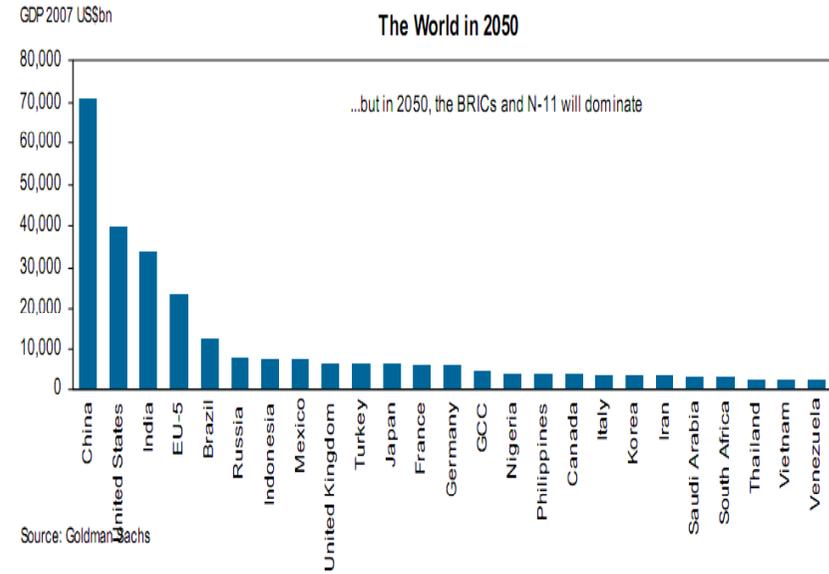
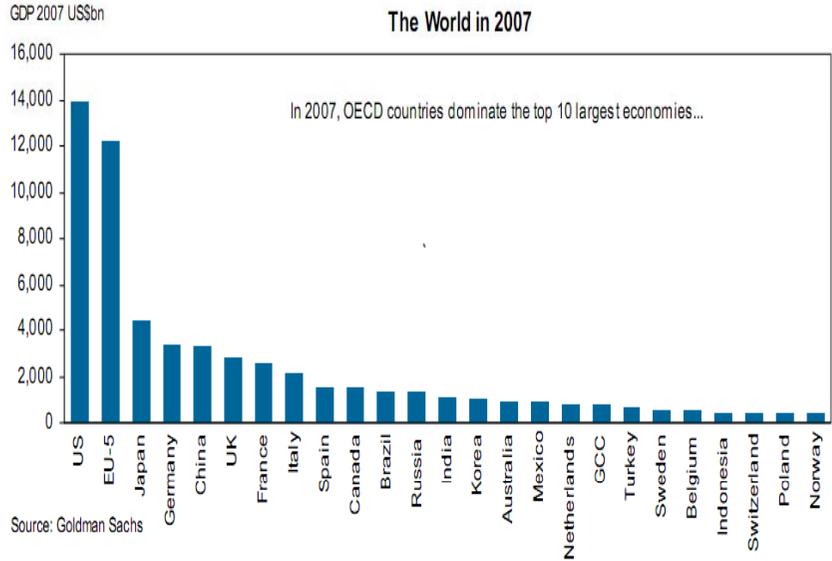
In 2030, World Bank projects that proportion of middle class from East Asia and Pacific will rise to nearly half of total global middle class (600 million) or 8.9% in 2030 accounting for 7.7% of global income



World Bank, Australian Government



The Rise of the Rest



The New USA



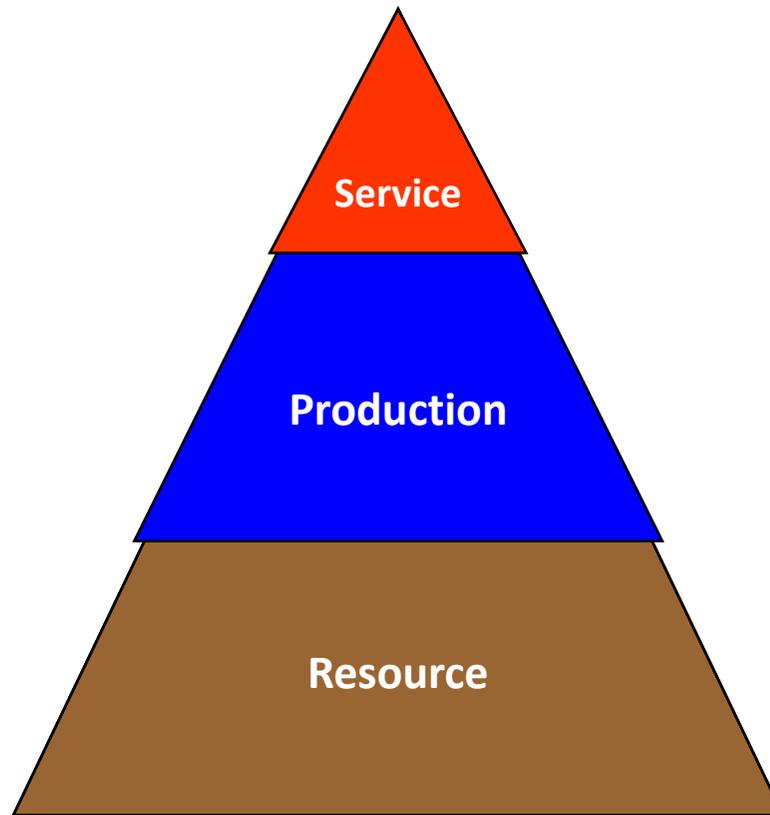
	2010 GDP (MER trillions)	2050 GDP (MER trillions)
PRC	5.7	62.9
India	1.4	40.4
Indonesia	.7	11.4
Japan	5.4	8.2
Republic of Korea	1.0	3.7
Thailand	.3	3.2
Malaysia	.2	2.6
Total Asia-7	14.8	132.4

ASEAN Economic Community

Singapore

Thailand/
Malaysia/
Indonesia/
Philippines/
Vietnam

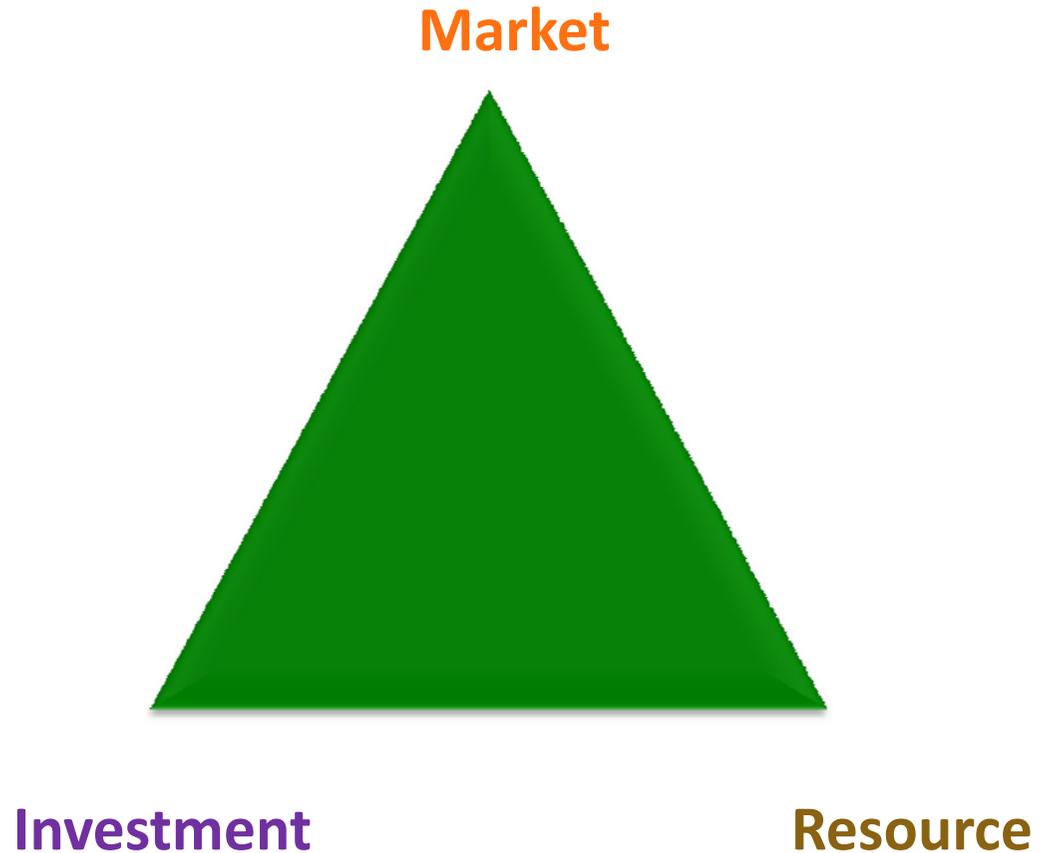
Brunei
Cambodia
Laos
Myanmar



- Rubber
- Automotives
- Tourism and Aviation
- Fashion
- Food
- Education
- Logistics/Transportation
- Agriculture and Fisheries
- Wood
- ICT and Healthcare
- Electronics
- Financial Services
- Energy
- Construction

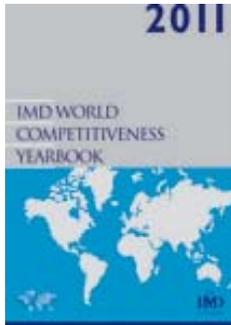
AEC as a Strategic Base

- Rubber
- Automotives
- Tourism and Aviation
- Fashion
- Food
- Education
- Logistics/Transportation
- Agriculture and Fisheries
- Wood
- ICT and Healthcare
- Electronics
- Financial Services
- Energy
- Construction



Competitiveness Rankings

- National Competitiveness



World Competitiveness Yearbook by IMD



Global Competitiveness Report by WEF



Ease of Doing Business Index by World Bank



Index of Economic Freedom by The Heritage Foundation and the Wall Street Journal

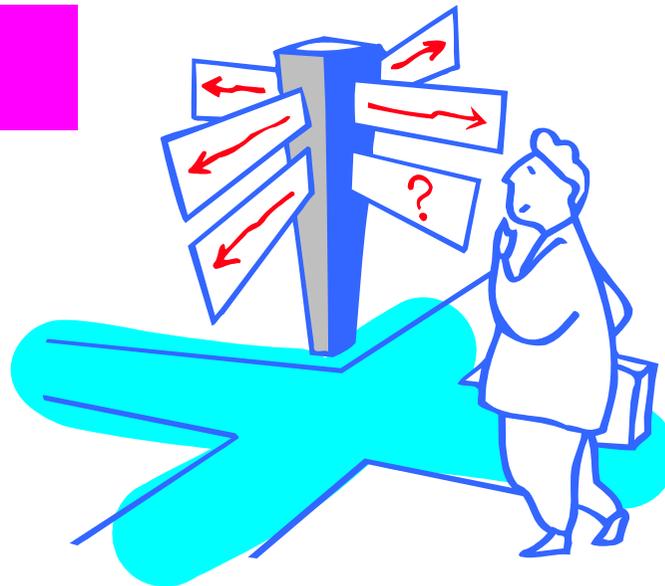
- Enterprise Competitiveness

- Dow Jones Sustainability Index
- Fortune's 500
- Forbes Global 2000, etc.

No One Can Manage Something They Can't Measure !!

ASSETS

**CAPITALIZING
ON
STRENGTHS!**



LIABILITIES

**IMPROVING
WEAKNESSES!**

Source : IMD International, Lausanne, Switzerland

Why are the Rankings Useful?

- **Benchmark globally**
- **Highlight competitive strengths and target weaknesses**
- **Set goals and targets**
- **Promote the country / public relations**
 - **attract investment**
 - **attract skills and talents**
 - **raise awareness and visibility**
- **Learn from the others..**

Source : [IMD International, Lausanne, Switzerland](#)

Who use Competitiveness Rankings?

The Private Sector

- To assess national environments in determining investment plans and location assessments

The Public Sector

- To benchmark its policy success and to see how other nations perform

How Competitiveness is Evaluated?

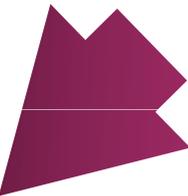
Definitions

- ▶ **IMD - Institute for Management Development**
 - How nations and enterprises *manage the totality of their competencies* to achieve long-term prosperity

- ▶ **WEF - World Economic Forum**
 - The set of institutions, policies, and factors that determine *the level of productivity of a country* which, in turn, sets the sustainable level of prosperity that can be earned by an economy

Competitiveness Framework

Competitiveness



COMPETENCIES

- ▶ **NATURAL ENDOWMENTS & GEOGRAPHY**
- ▶ **DRIVERS OF GROWTH**
 - **SKILLS & TALENTS**
 - **INFRASTRUCTURE**
 - **PRODUCTIVITY**
 - **INNOVATION, ETC....**

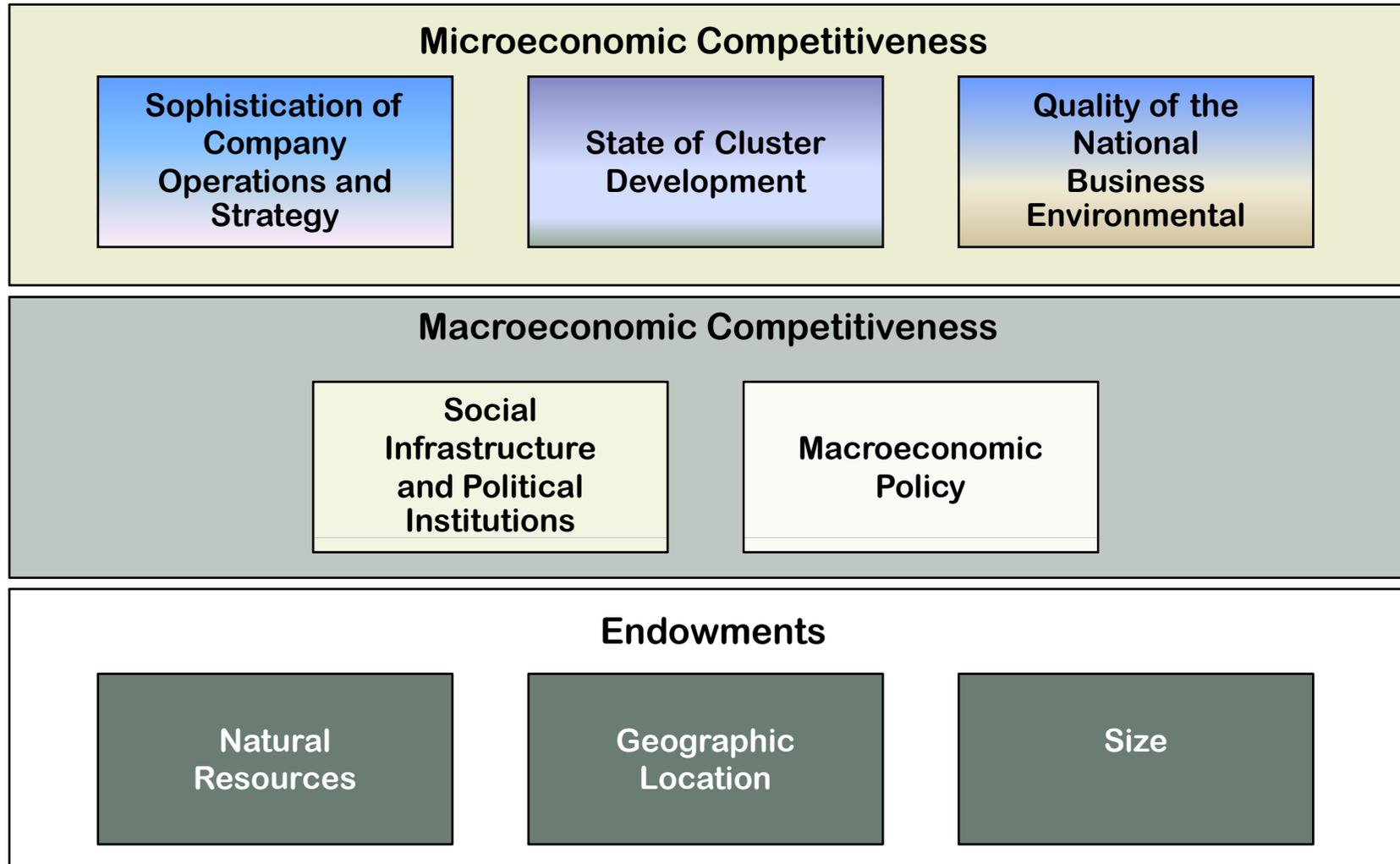


MINDSET

- ▶ **ATTITUDES & VALUES**
 - **GOVERNMENTS**
 - **BUSINESSES**
 - **PEOPLE**

Source : IMD International, Lausanne, Switzerland

Competitiveness Framework



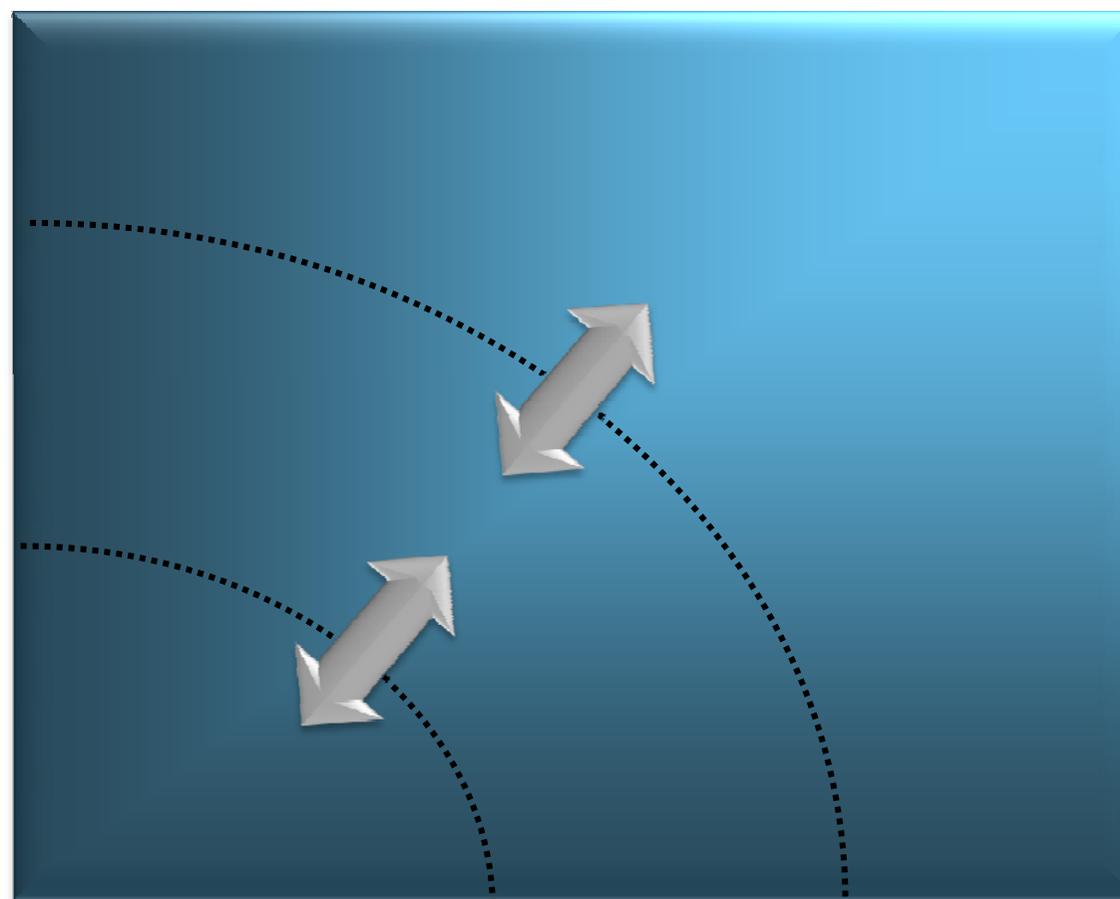
Source: Dr. Christian H. M. Keteis, Professor Michael E. Porter

Creating a Pro-Competitive Platform

Nation's
Competitiveness

Industry
Collaborative
Network

Corporate
Competency

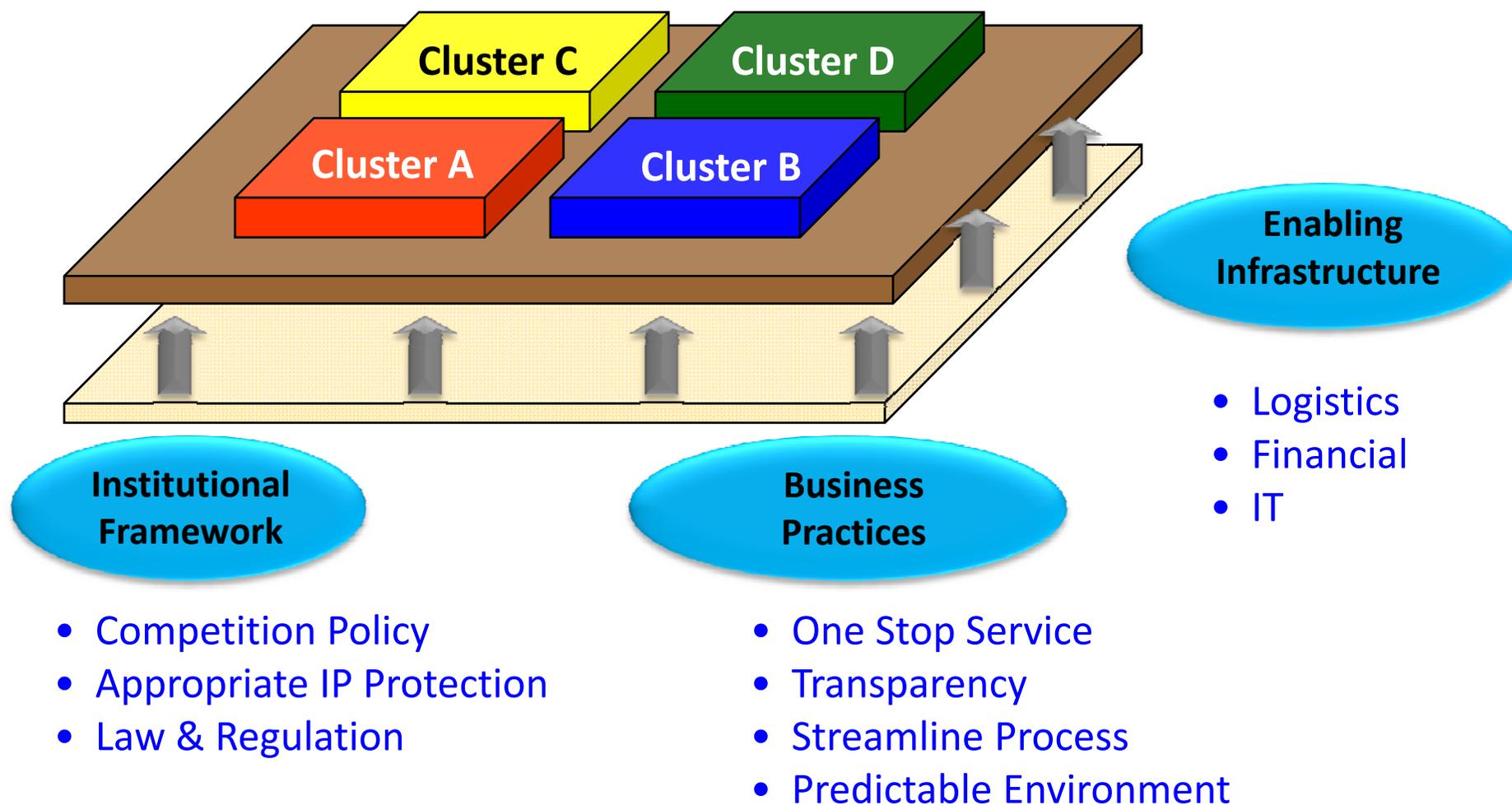


Individual
Enterprise

Industry
Cluster

National
Ecosystem

Enabling Environment



Enabling Environment for Building an Entrepreneurial Society



Increase Business Opportunities

- Increasing Market Access
- Increasing Credit Access
- Increasing Technology Access
- Increasing Labor Market Access

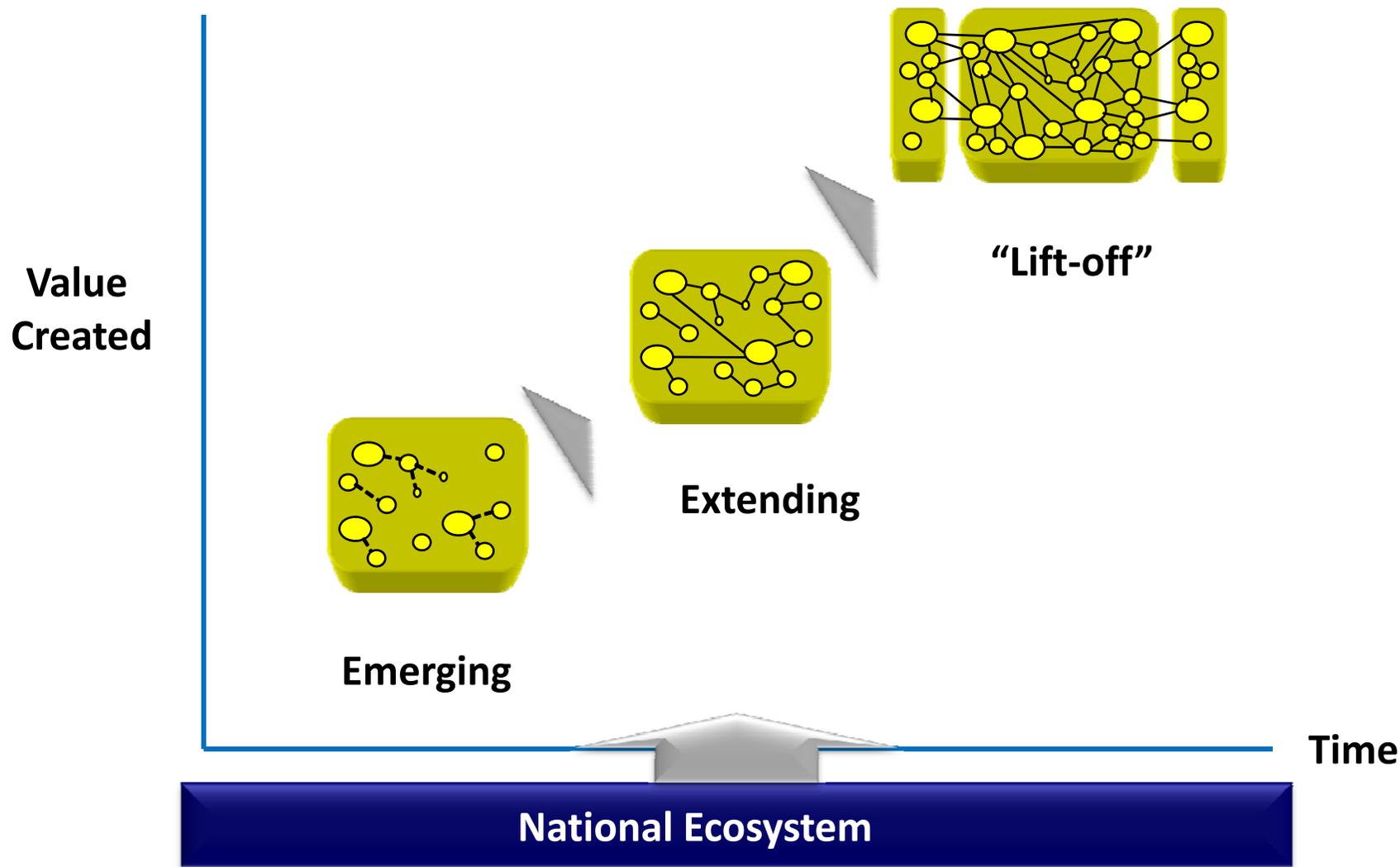
Enhance Operational Capability

- Enhancing Innovation
- Improving Productivity
- Enhancing Collaborative Network

Decrease Transaction Costs

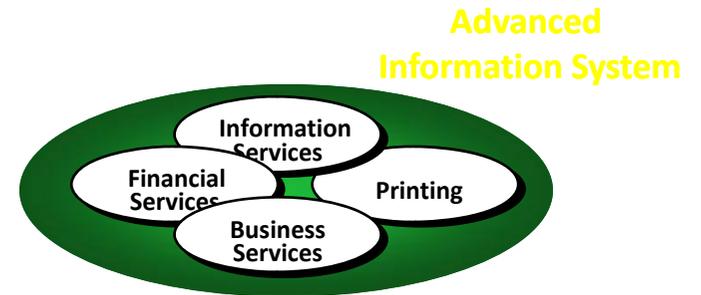
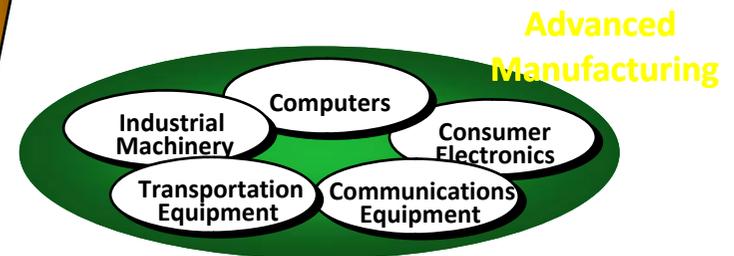
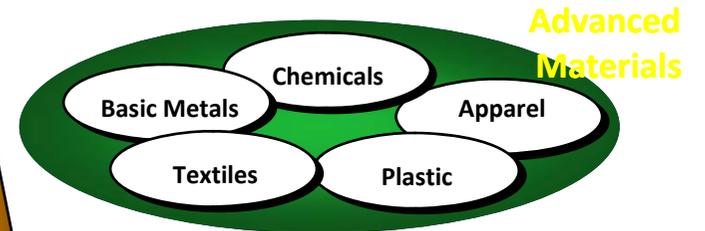
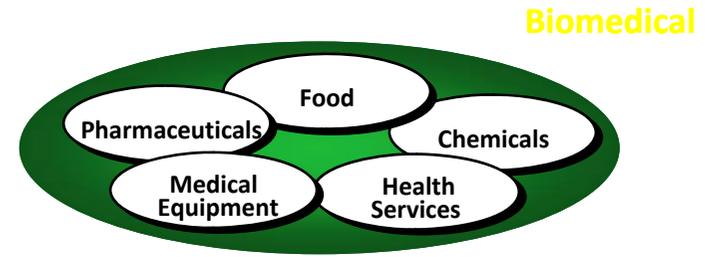
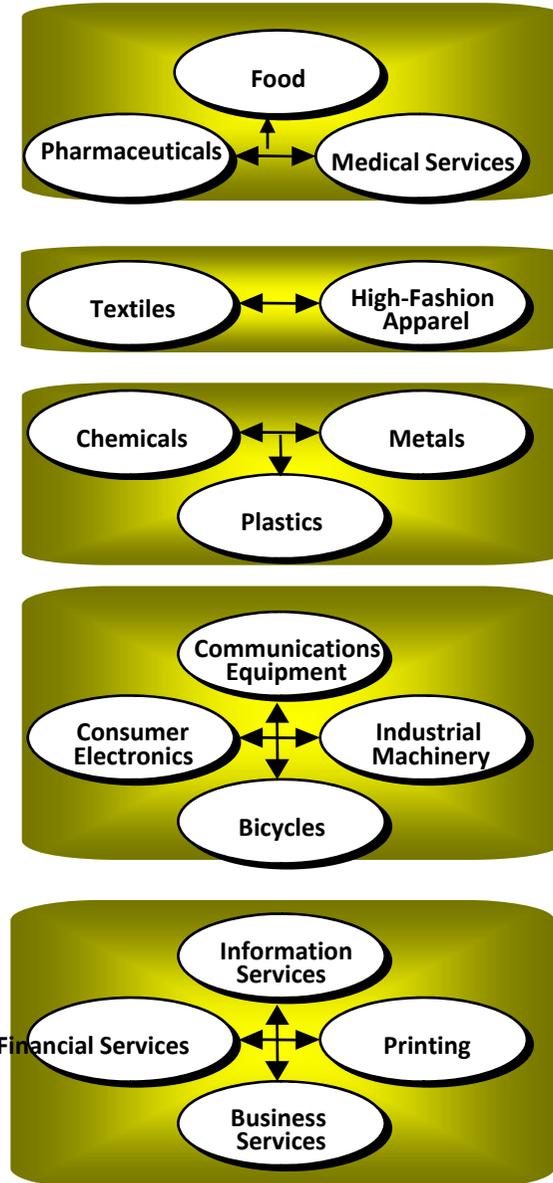
- Creating a Predictable Environment
- Relaxing Business Constraints
- Minimizing Business Risks

Smart Collaborative Network Development

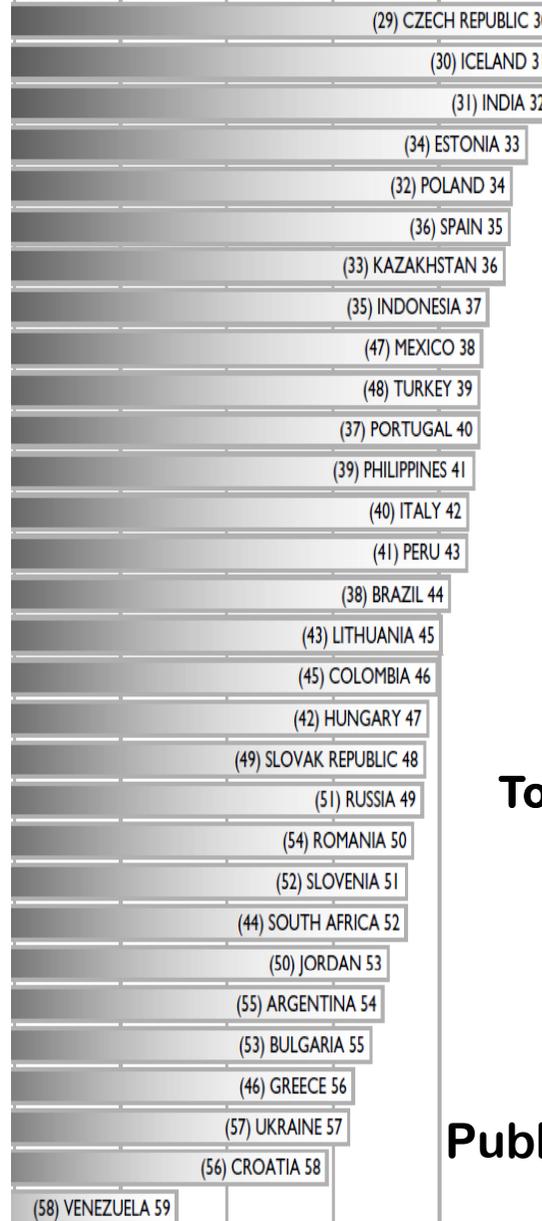
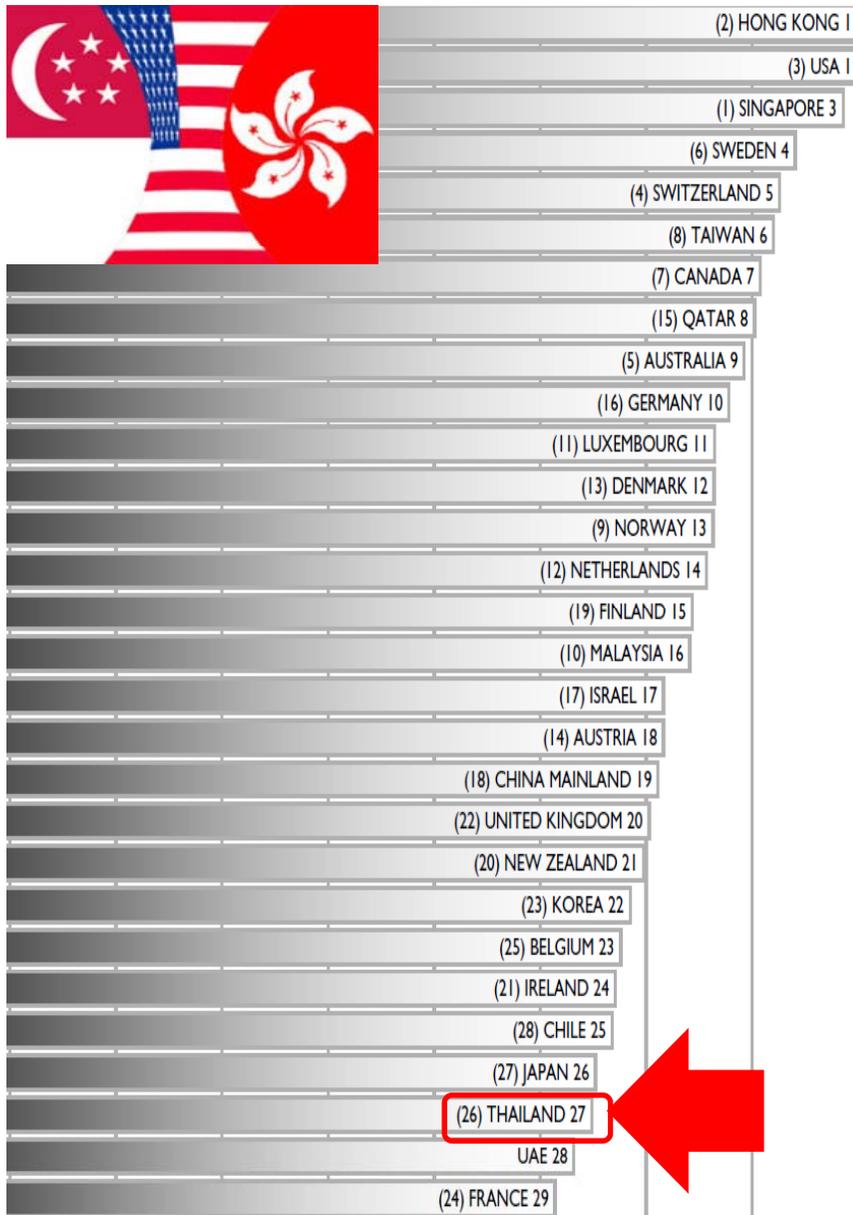


Dynamics of Clustering and Industry Transformation

- Food
- Agriculture
- Textiles
- Apparel
- Chemicals
- Basic Metals
- Electrical Machinery
- Industrial Machinery
- Metal Products
- Trade, Wholesale Distribution
- Banking

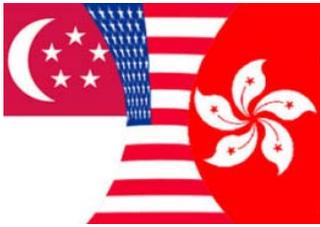


Where is Thailand in the World Competitiveness Rankings?

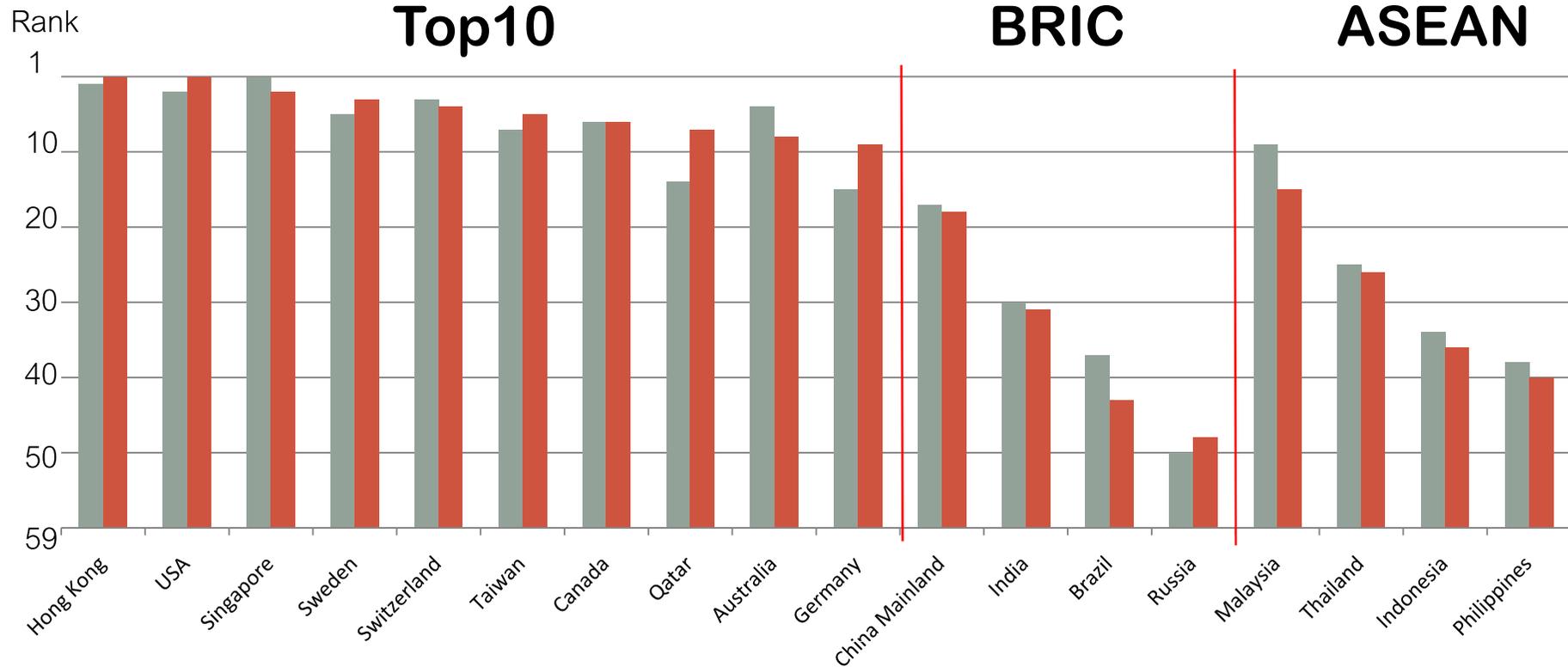


Total 59 Economies

Published: May 2011



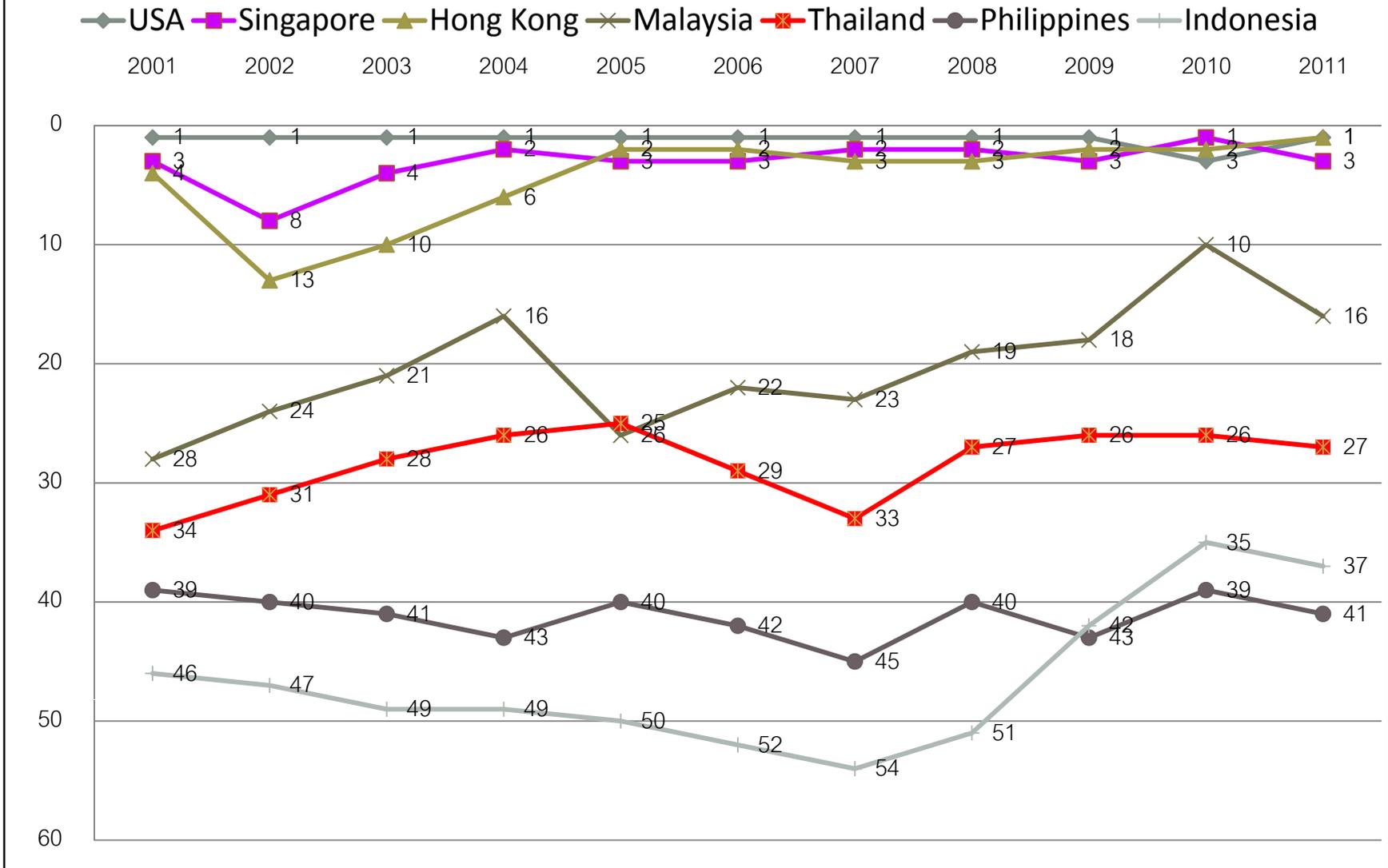
IMD : The World Competitiveness Scoreboard 2010-11



Y 2010	2	3	1	6	4	8	7	15	5	16	18	31	38	51	10	26	35	39
Y 2011	1	1	3	4	5	6	7	8	9	10	19	32	44	49	16	27	37	41
Diff	1	2	-2	2	-1	2	-	7	-4	6	-1	-1	-6	2	-6	-1	-2	-2

**Total 59 Economies
Published : May 2011**

The Evaluation : Overall Ranking 2001- 2011



Source: IMD International, Lausanne, Switzerland

WEF: The Global Competitiveness Index 2010-2011 Top 20 and selected economies

Country/Economy	GCI 2010–2011		GCI 2009–2010 rank *
	Rank	Score	
Switzerland	1	5.63	1
Sweden	2	5.56	4
Singapore	3	5.48	3
United States	4	5.43	2
Germany	5	5.39	7
Japan	6	5.37	8
Finland	7	5.37	6
Netherlands	8	5.33	10
Denmark	9	5.32	5
Canada	10	5.30	9
Hong Kong SAR	11	5.30	11
United Kingdom	12	5.25	13
Taiwan, China	13	5.21	12
Norway	14	5.14	14
France	15	5.13	16
Australia	16	5.11	15
Qatar	17	5.10	22
Austria	18	5.09	17
Belgium	19	5.07	18
Luxembourg	20	5.05	21

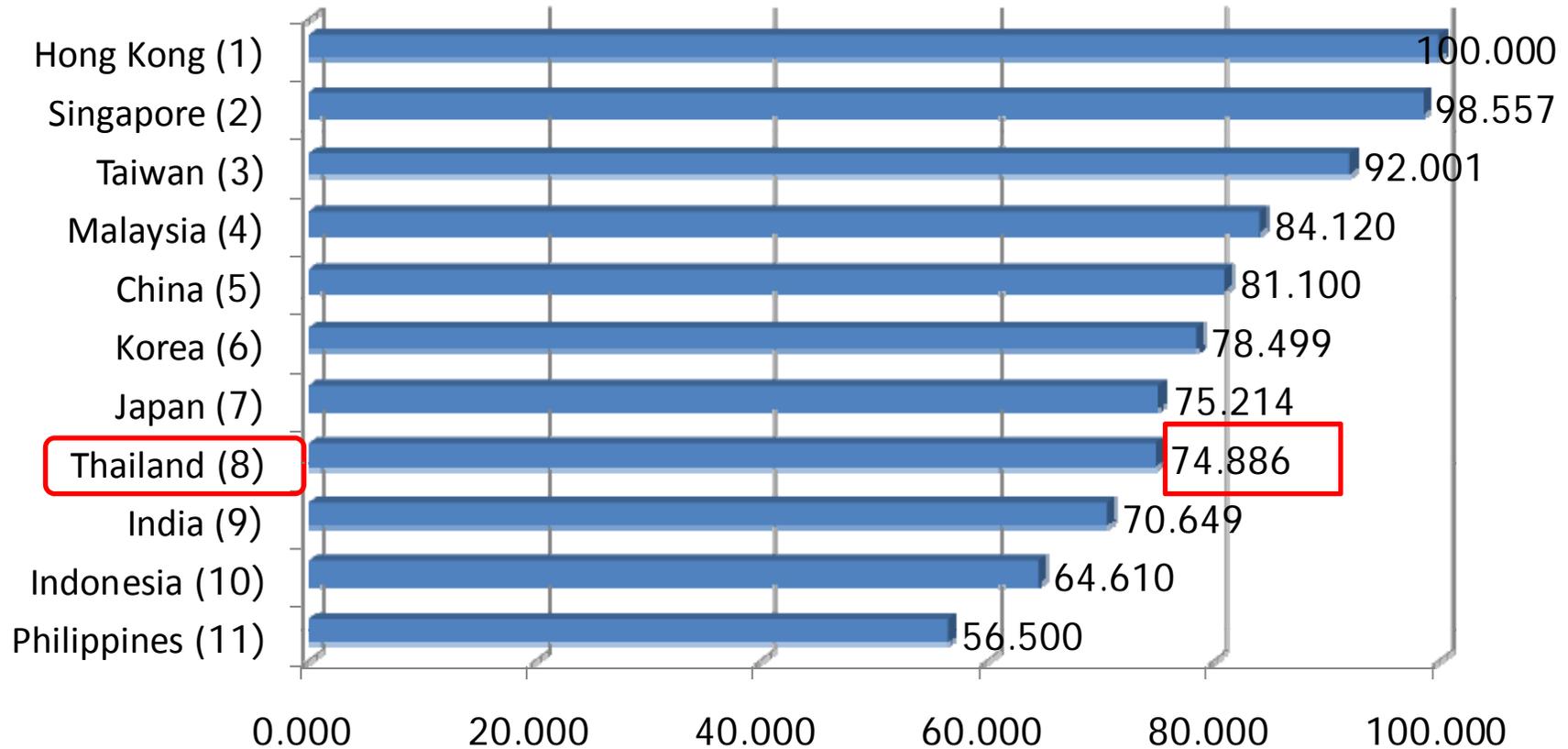
Country/Economy	GCI 2010–2011		GCI 2009–2010 rank *
	Rank	Score	
Korea, Rep.	22	4.93	19
Malaysia	26	4.88	24
China	27	4.84	29
Brunei Darussalam	28	4.75	32
Thailand	38	4.51	36
Indonesia	44	4.43	54
India	51	4.33	49
South Africa	54	4.32	45
Brazil	58	4.28	56
Vietnam	59	4.27	75
Sri Lanka	62	4.25	79
Russian Federation	63	4.24	63
Philippines	85	3.96	87
Bangladesh	107	3.64	106
Cambodia	109	3.63	110
Pakistan	123	3.48	101
Nepal	130	3.34	125
Chad	139	2.73	131

Total: 139 economies

Published: September 2010

Thailand in the World Competitiveness Yearbook 2011

Asian Countries Ranking 2011



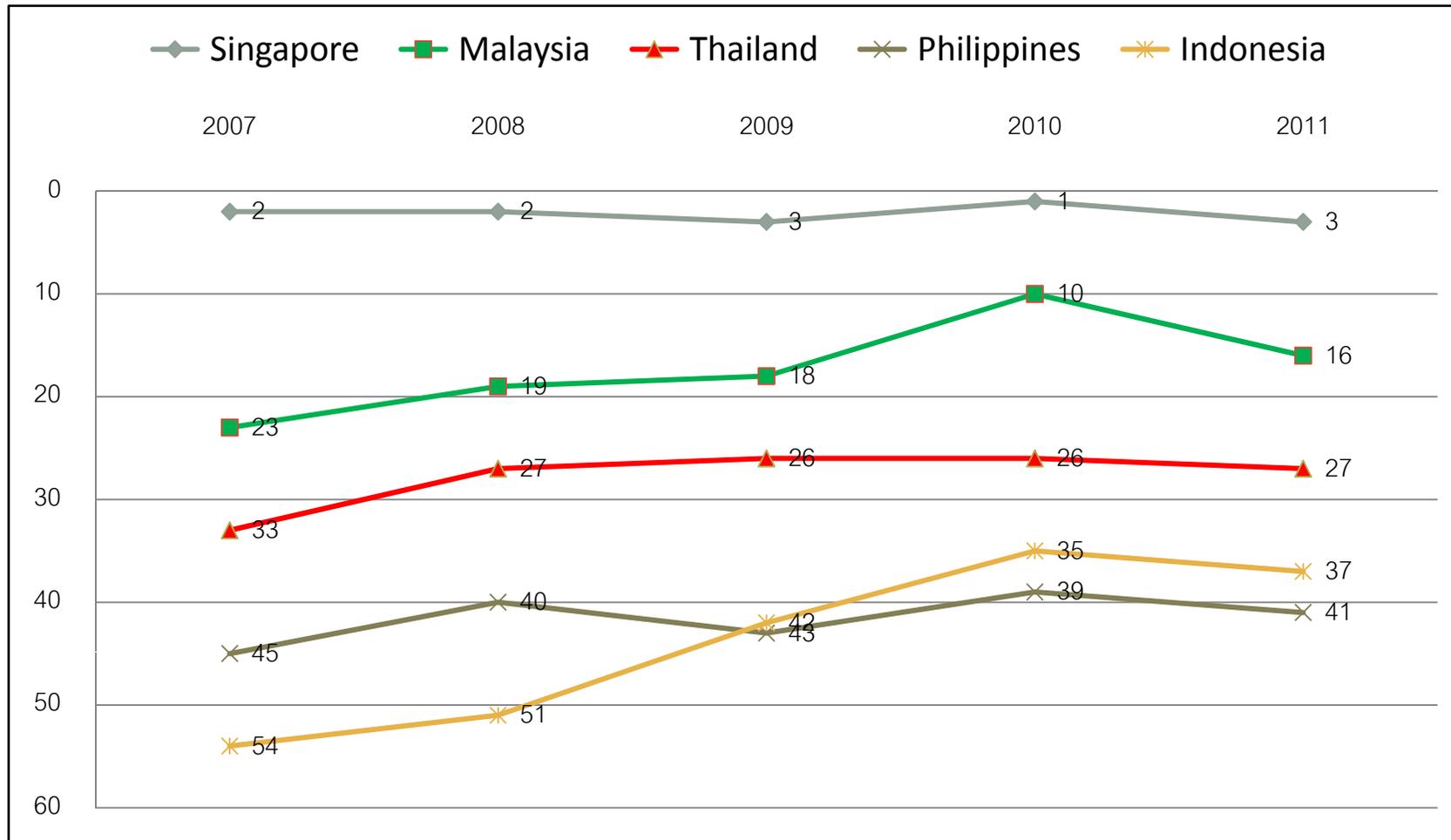
Source: IMD International, Lausanne, Switzerland

ASEAN Overall & Factor Benchmarking 2011

	Singapore	Malaysia	Thailand	Indonesia	Philippines
Overall	3	16	27	37	41
Economic Performance	5	7	10	32	29
Government Efficiency	2	17	23	25	37
Business Efficiency	2	14	19	33	31
Infrastructure	10	27	47	55	57

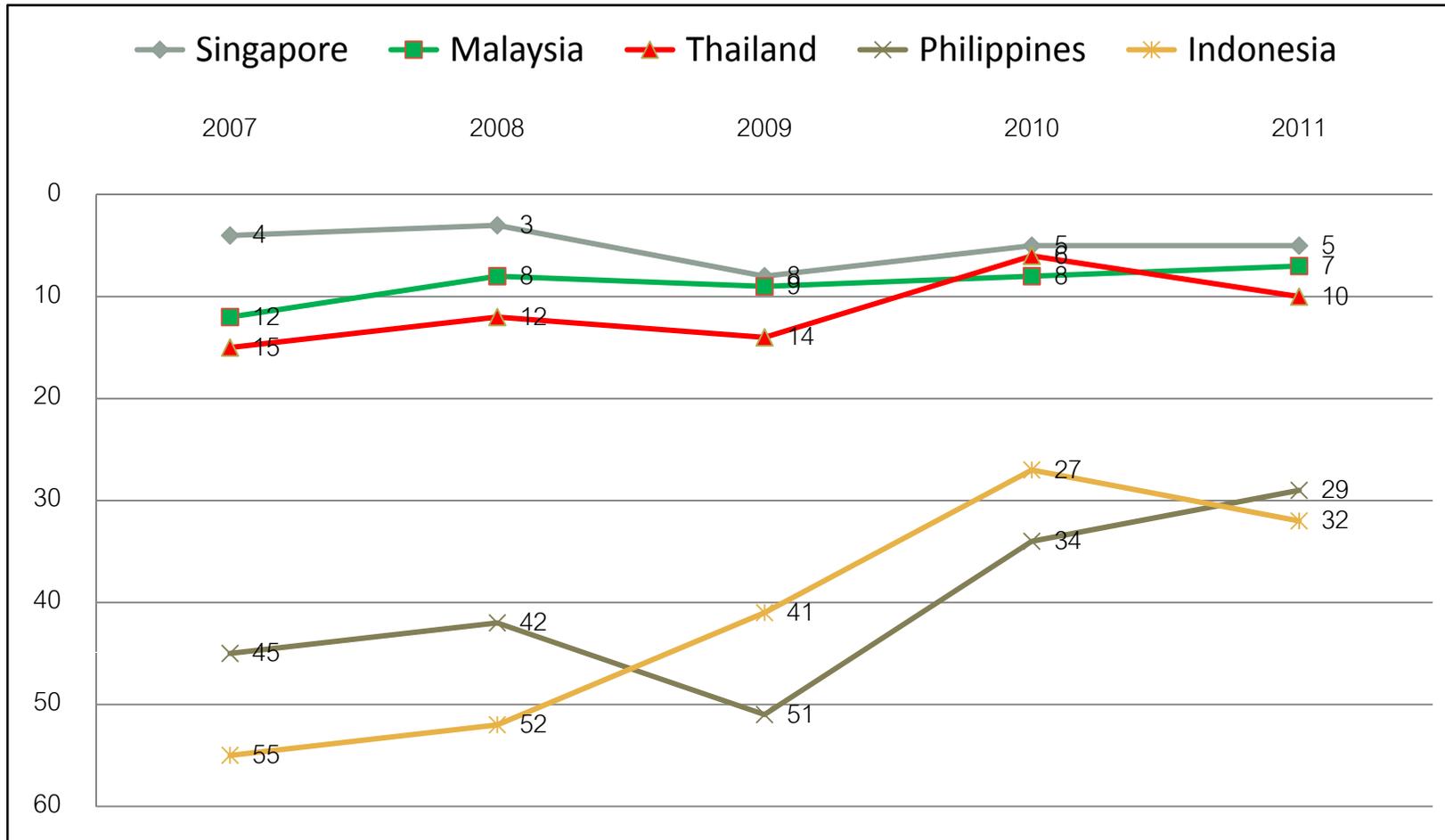
Source: IMD International, Lausanne, Switzerland

ASEAN Countries Improvements Overall



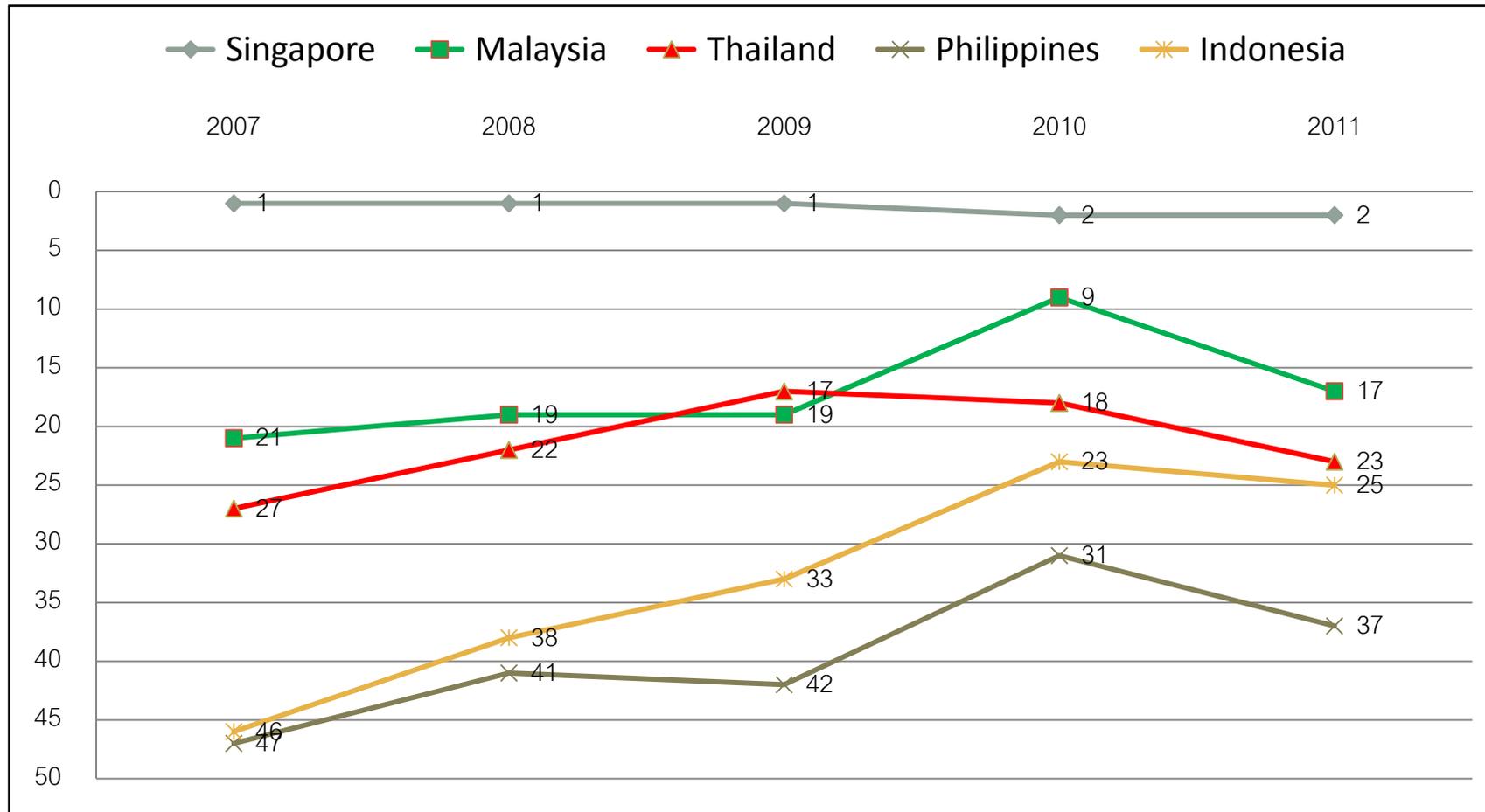
Source: IMD International, Lausanne, Switzerland

ASEAN Countries Improvements Economic Performance



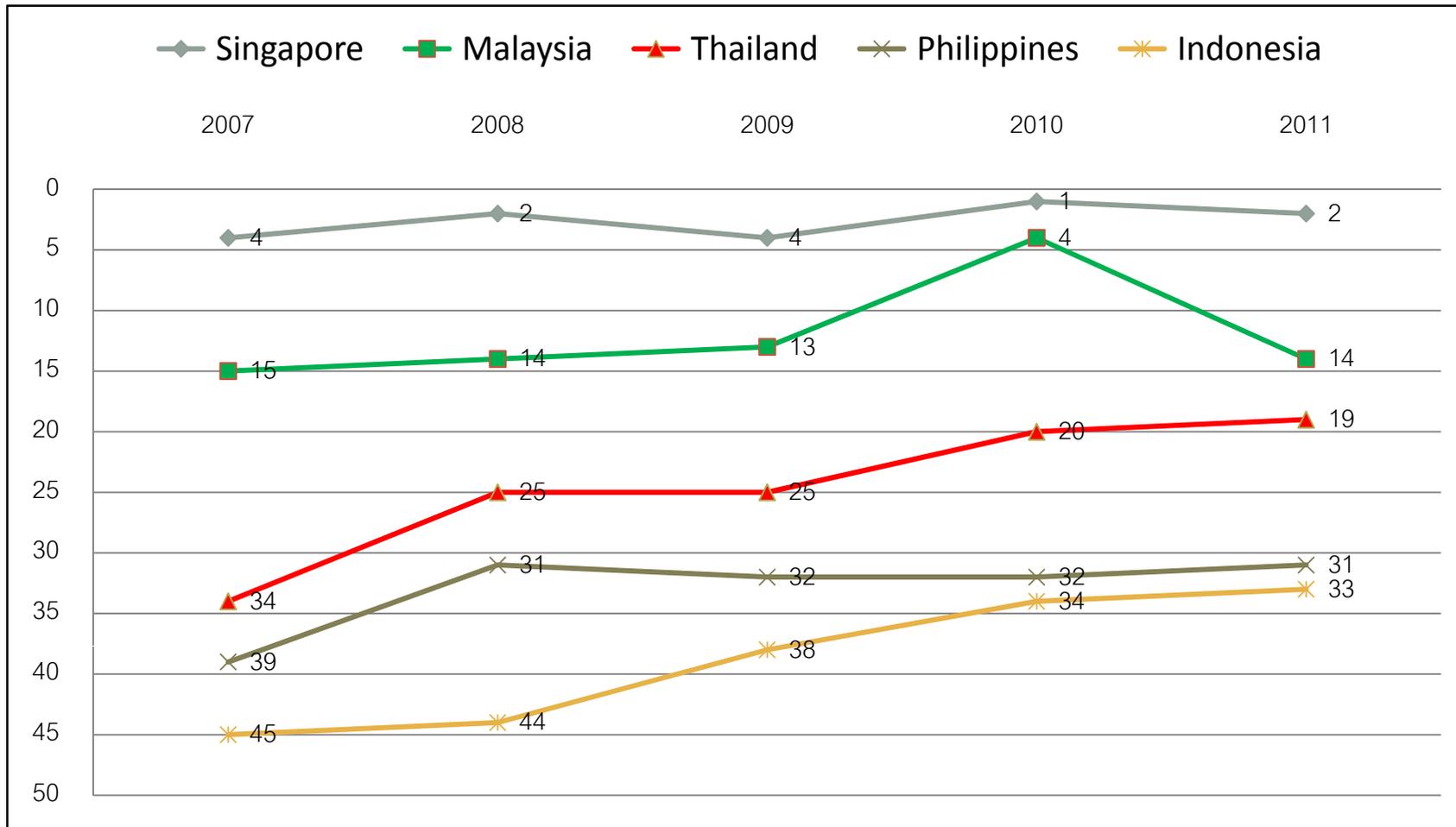
Source: IMD International, Lausanne, Switzerland

ASEAN Countries Improvements Government Efficiency



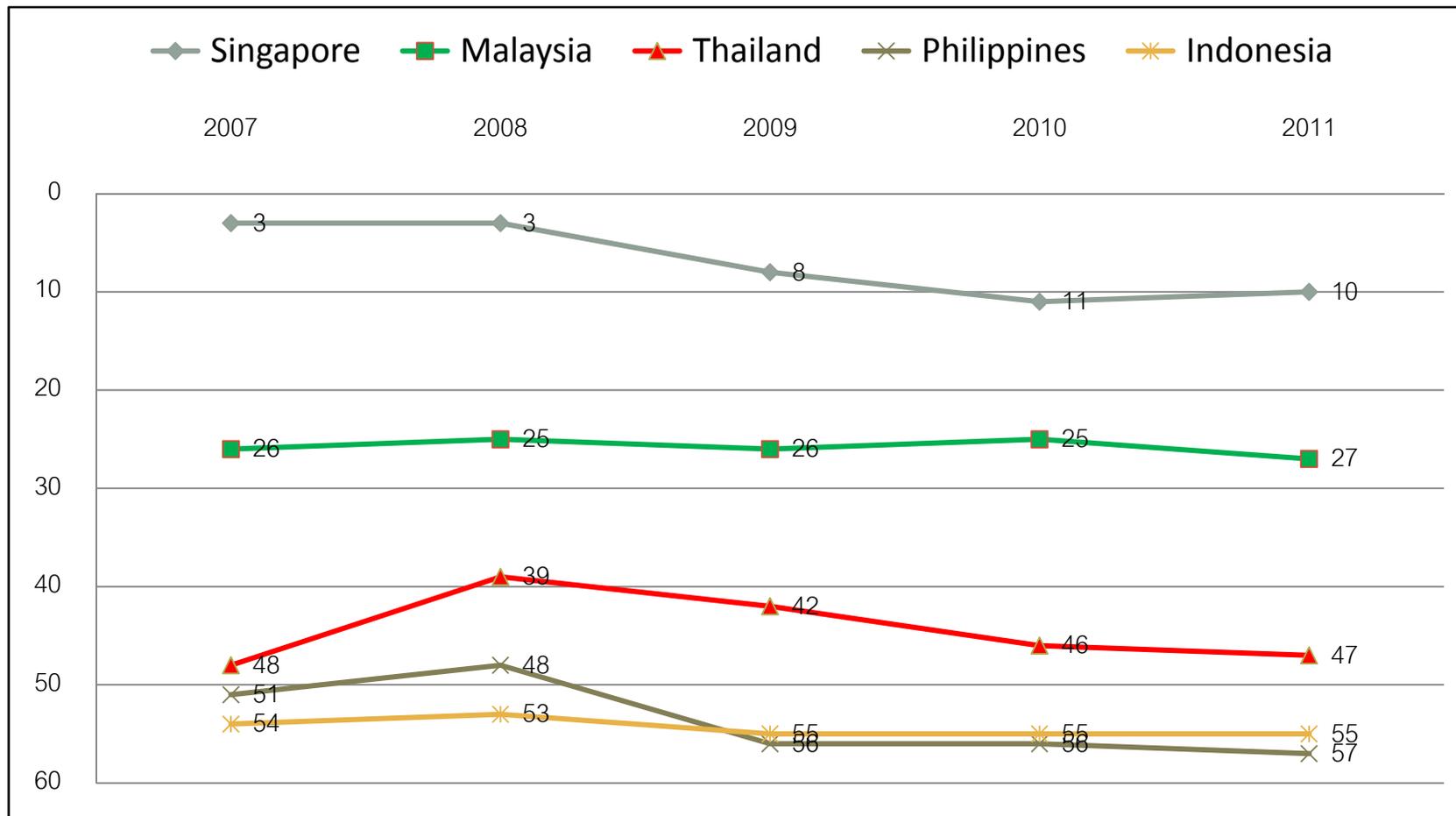
Source: IMD International, Lausanne, Switzerland

ASEAN Countries Improvements Business Efficiency



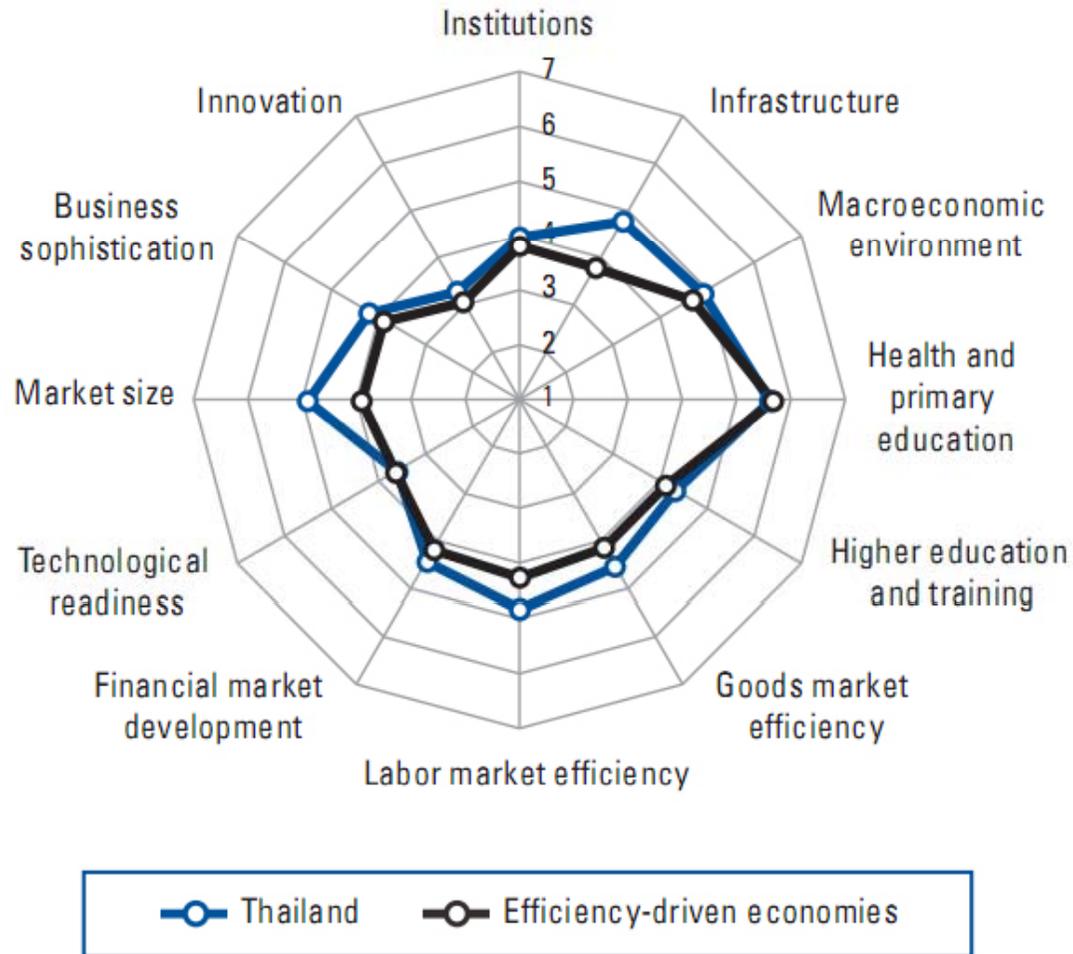
Source: IMD International, Lausanne, Switzerland

ASEAN Countries Improvements Infrastructure



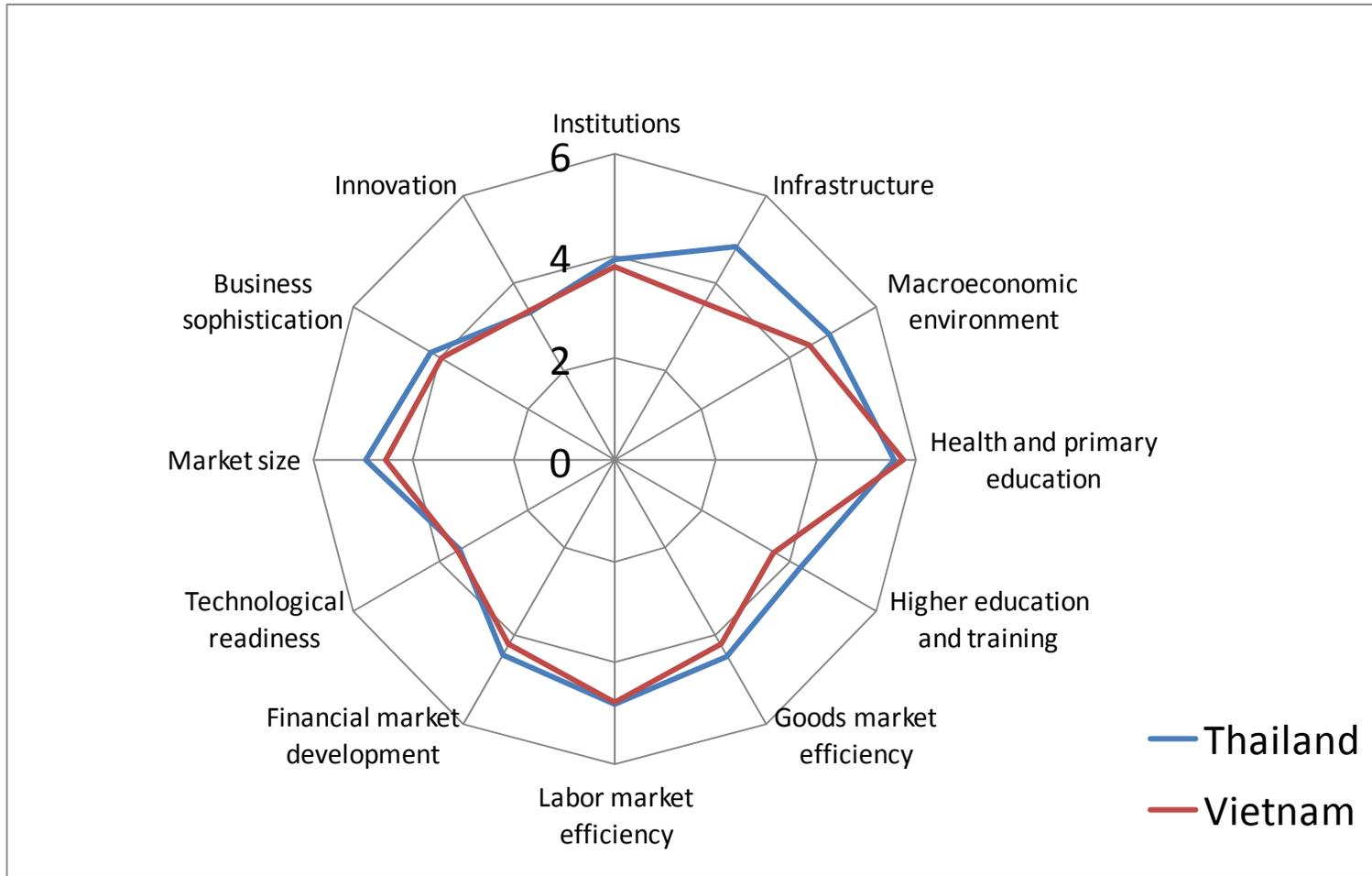
Source: IMD International, Lausanne, Switzerland

WEF Global Competitiveness Report 2010-11



Source: World Economic Forum

Thailand and Vietnam in WEF GCR



Source: World Economic Forum

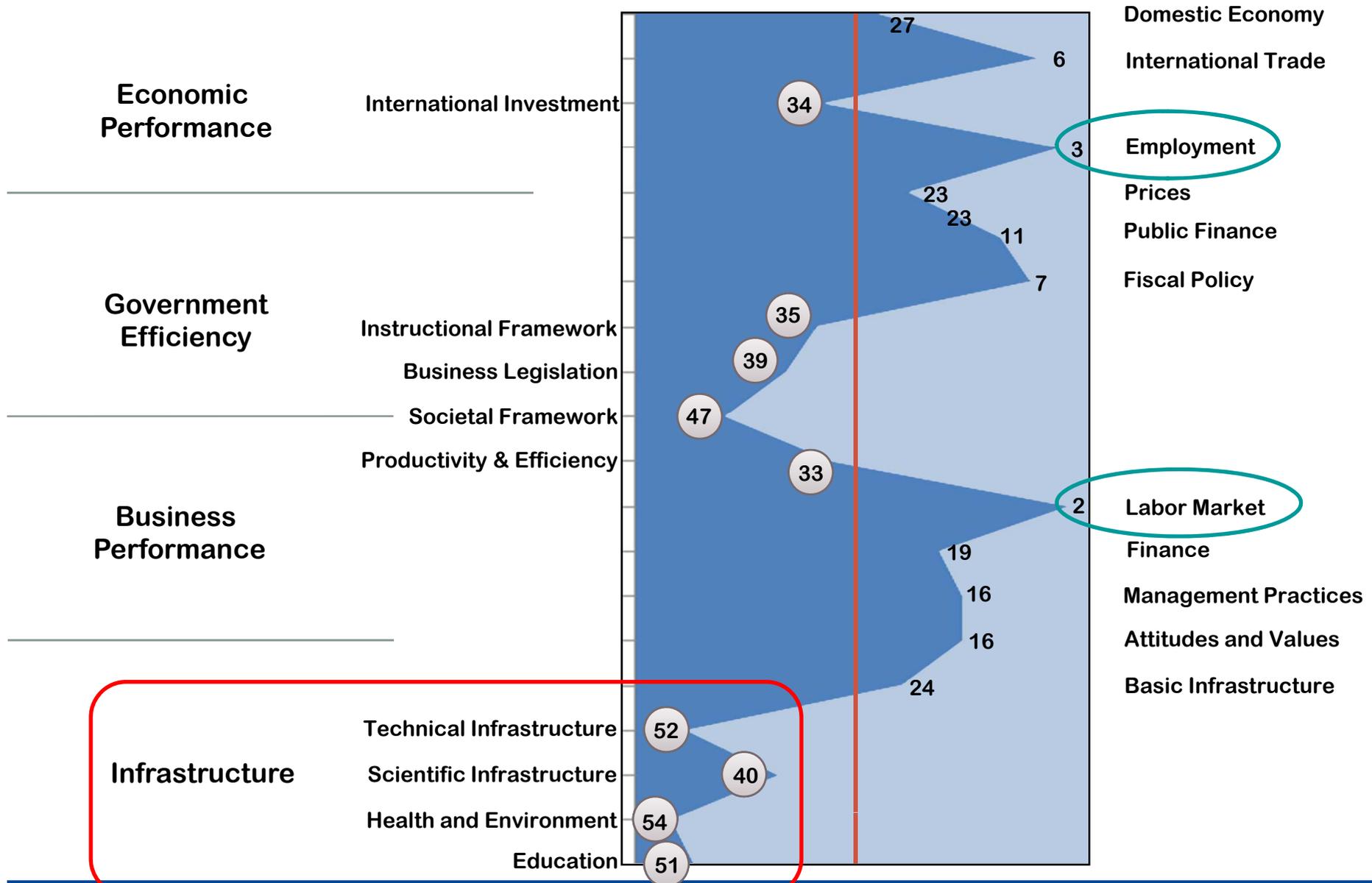
Evolution of Factor Rankings : Thailand

Competitiveness Factor	2007	2008	2009	2010	2011
Economic Performance	15	12	14	6	10
Government Efficiency	27	22	17	18	23
Business Efficiency	34	25	25	20	19
Infrastructure	48	39	42	46	47

Source: IMD International, Lausanne, Switzerland

Criteria

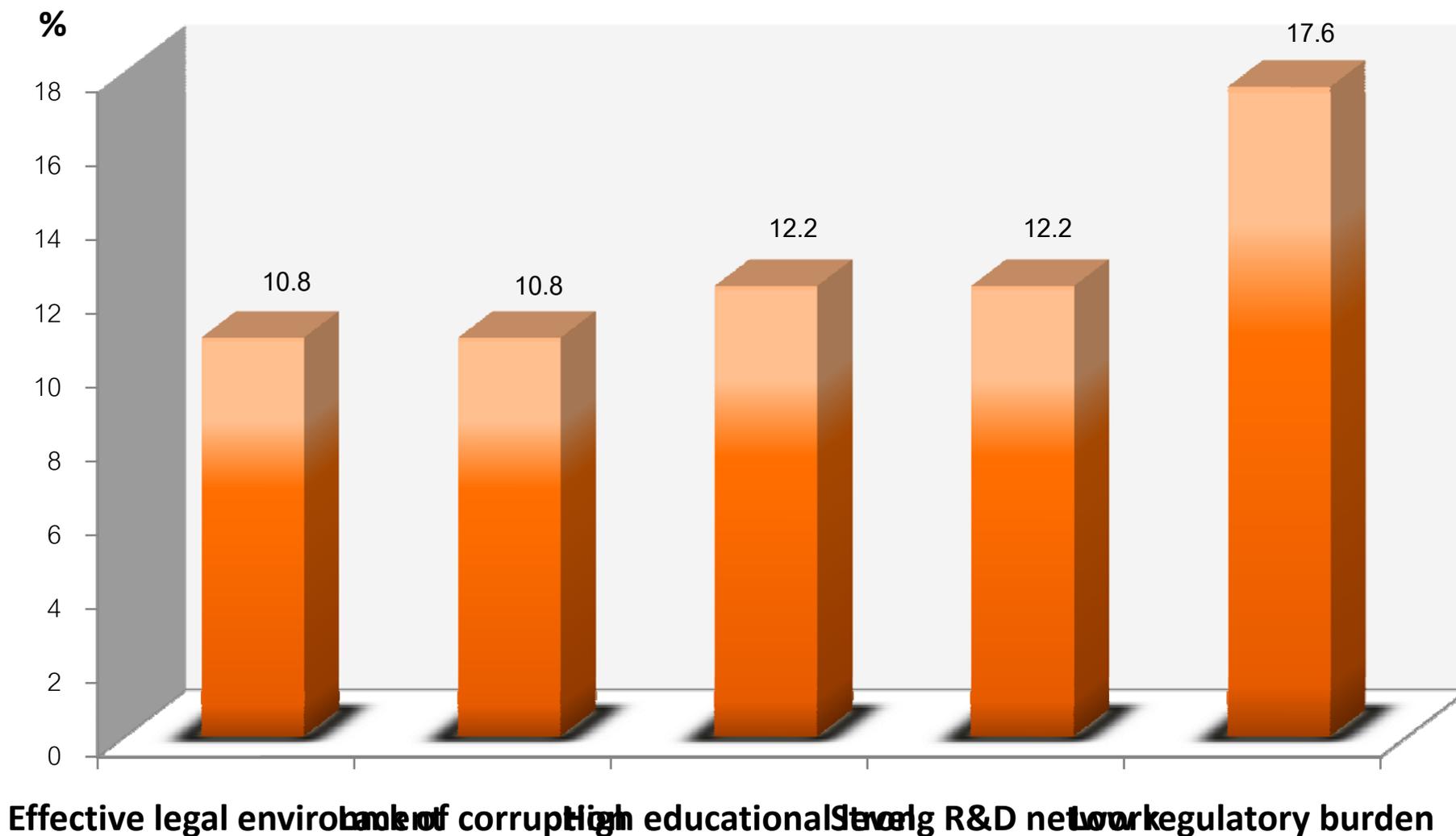
Ranking



Thailand's **Weaknesses**

- GDP per capita
- Risk of political instability, business cost of terrorism
- Business start-up days
- Productivity
- Medical assistance
- Broadband internet subscription, Internet bandwidth speed
- Communication technology
- Human Development index
- Secondary school enrollment and pupil-teacher ratio
- Total health expenditure
- Total expenditure on R&D
- IT skills

Five least favorable factors of the economy



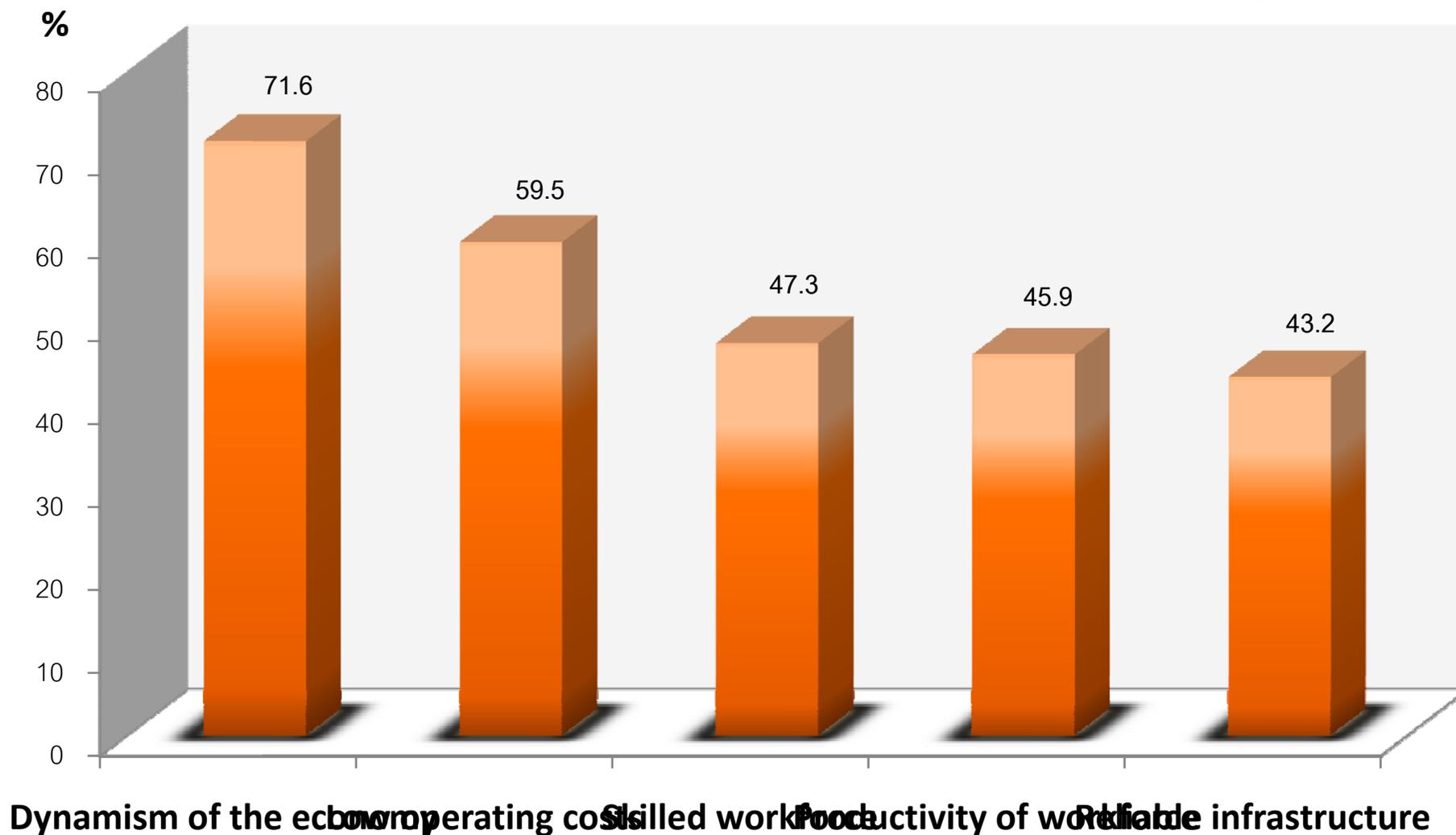
Thailand' Strengths

- Labor force and employment
- Real GDP growth, inflation, foreign currency reserve
- Effective personal income tax rate and consumption tax rate
- Investment incentives
- Investor protection
- Financial institution transparency

Thailand' Strengths

- **Mobile telephone costs**
- **Quality of roads/air transport infrastructure**
- **Sustainable development**
- **Customer oriented**
- **National culture**
- **Attitudes toward globalization**

Top 5 Key attractiveness factors of the economy

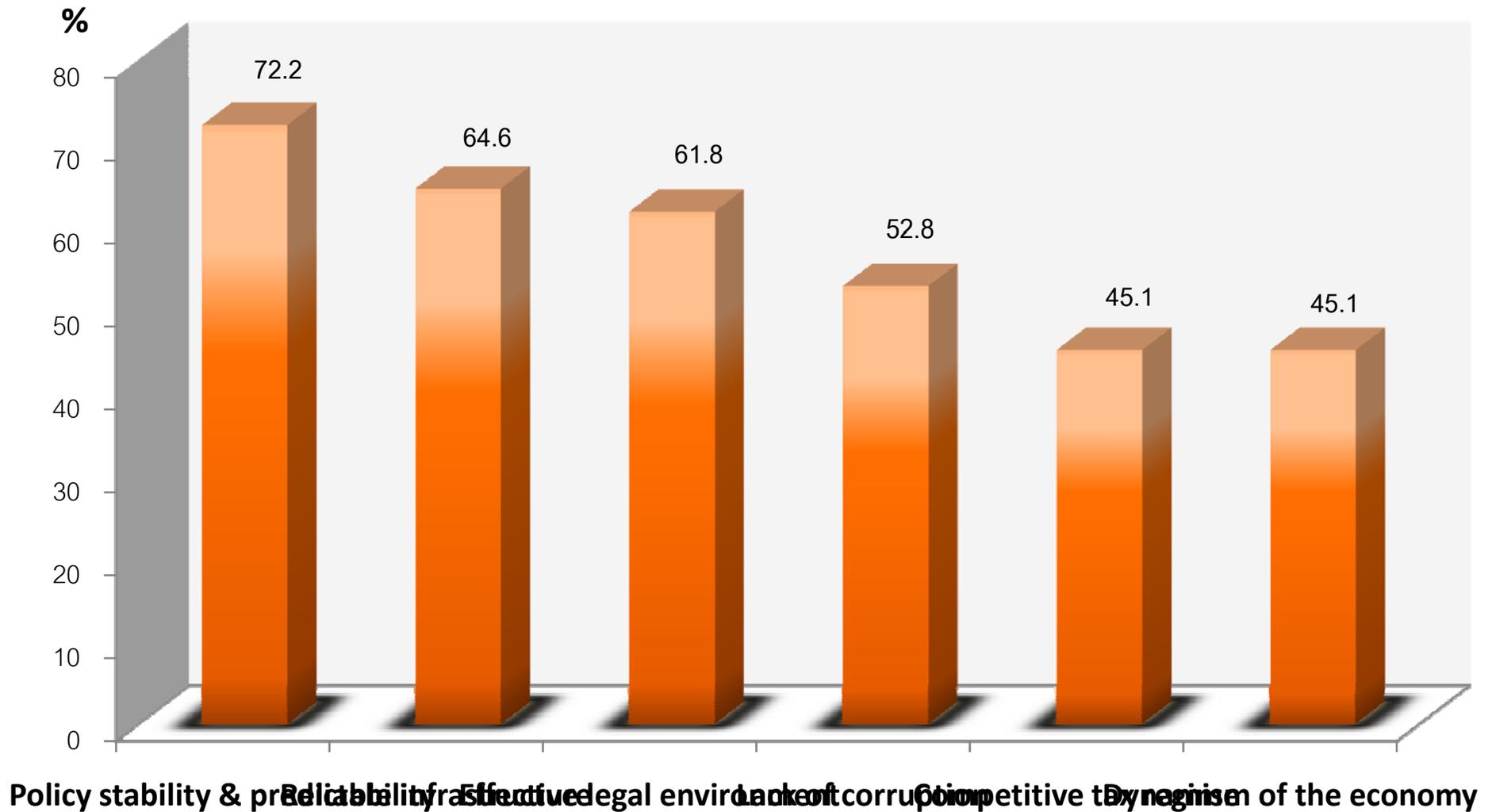


Criteria related to State Enterprises

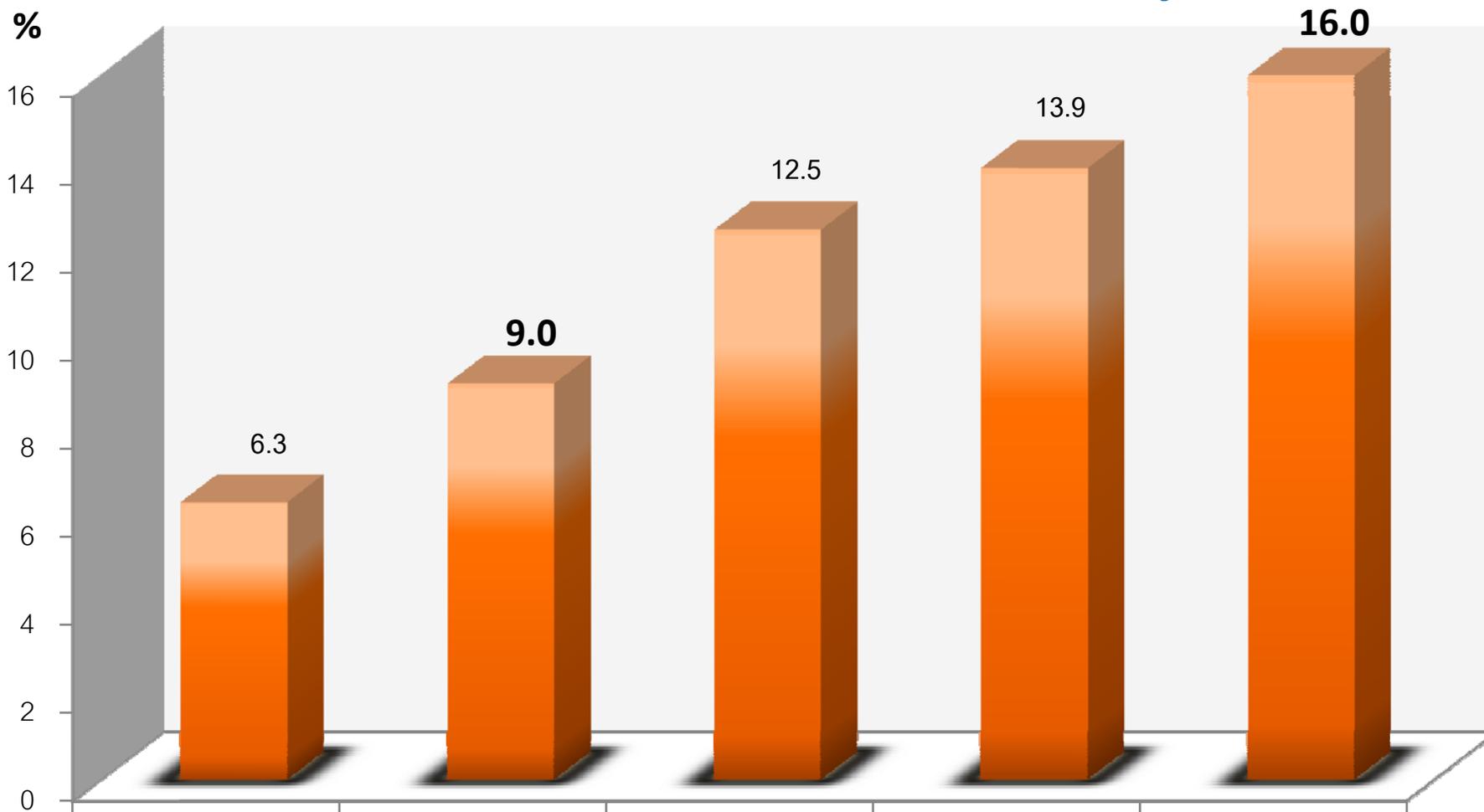
Key attractiveness indicators identified by top 10 most competitive economies

- **Reliable infrastructure**
- **Policy stability & predictability**
- **Dynamism of the economy**
- **Lack of corruption**
- **High educational level**
- **Skilled workforce**
- **Effective legal environment**

Top 5 key attractiveness factors of the economy

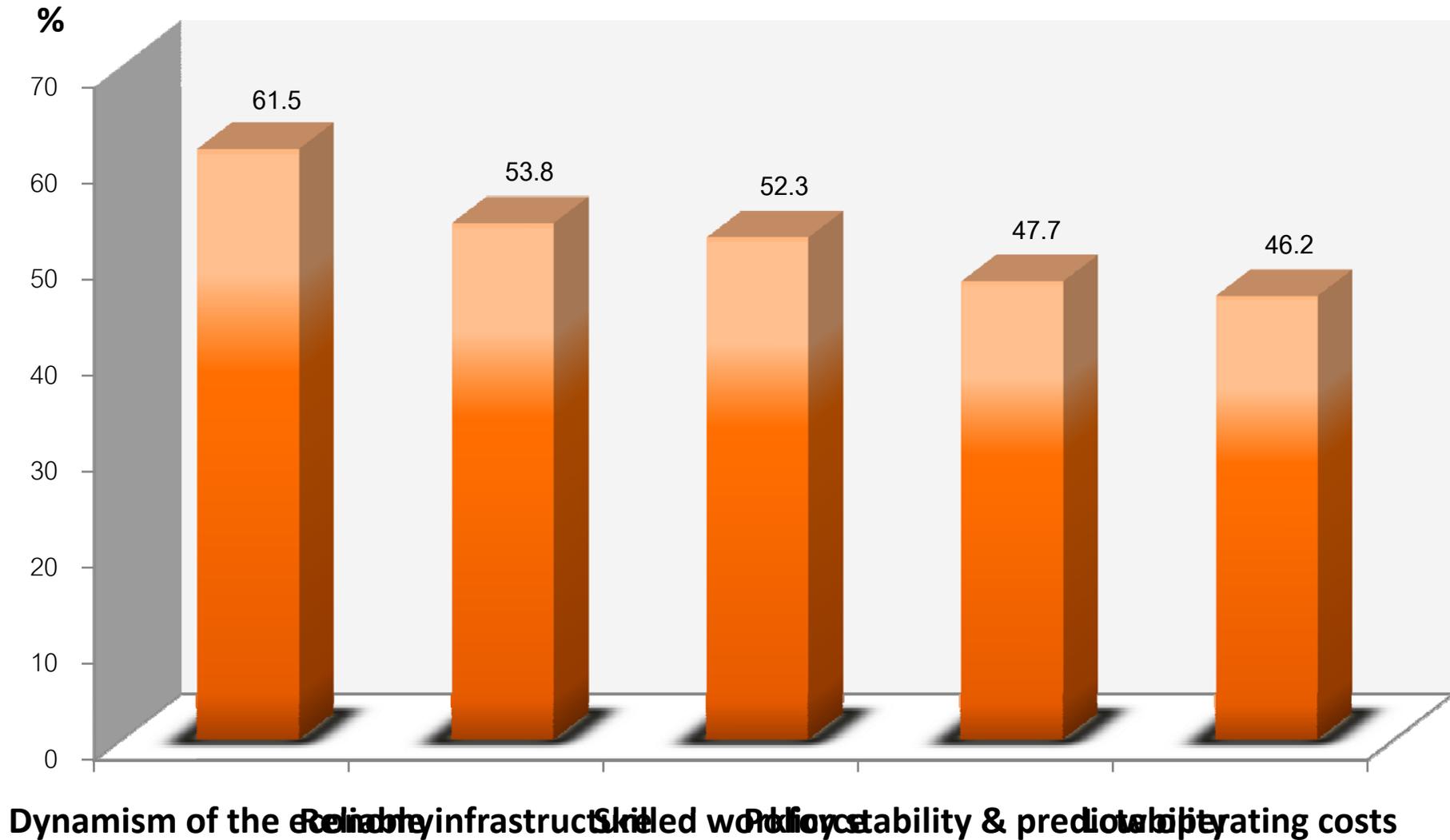


Five least favorable factors of the economy



Low operating costs Strong R & D network Low regulatory burden Incompetent managers Access to financing

Top 5 key attractiveness factors of the economy



Five least favorable factors of the economy

