

ปรับระบบราชการไทย...

เตรียมพร้อมสู่อาเซียน 2015

การเสวนาการประชุมสัมมนาทางวิชาการประจำปี 2555

สำนักงาน ก.พ.ร.



3 ตุลาคม 2555

ดร. กิริฎา เภาพิจิตร
นักเศรษฐศาสตร์อาวุโส
ธนาคารโลก สำนักงานประเทศไทย

Longer-term View of Thailand's Future Development

1. How has the external environment changed for Thailand post Subprime and Eurozone crises?
2. What does Thailand need to do to remain competitive in the increasingly competitive world?
3. How can the **Thai public sector use AEC** as an opportunity to increase Thailand's competitiveness and promote inclusive growth in the new global economy?

**1. HOW HAS THE EXTERNAL ENVIRONMENT
CHANGED FOR THAILAND POST
SUBPRIME AND EUROZONE CRISES?**

The global economy has changed with the Subprime and Eurozone Crises

(Percentage change from previous years, except interest rates and oil price)

	2009	2010	2011	2012e	2013f
World trade Volume (GNFS)	-10.6	13.0	6.1	5.3	7.0
Commodity Prices (USD terms)					
Non-oil commodities	-22.0	22.5	20.7	-8.5	-2.2
Oil Price (USD per barrel)	61.8	79.0	104.0	106.6	103.0
Real GDP growth					
World	-2.3	4.1	2.8	2.2	2.7
High income	-3.7	3.0	1.6	1.4	1.8
OECD Countries	-3.7	2.9	1.4	1.3	1.8
Euro Area	-4.2	1.8	1.5	-0.4	0.3
Japan	-5.5	4.5	-0.7	2.6	1.2
United States	-3.5	3.0	1.8	2.2	2.1
Non-OECD countries	-1.5	7.4	4.8	3.6	4.3
Developing Countries	2.0	7.4	6.1	5.3	5.9
East Asia and Pacific	7.5	9.7	8.3	7.6	8.1
China	9.2	10.4	9.3	7.7	8.1
India	9.1	9.6	6.9	6.6	6.9
Dev. Countries excl. China and India	-1.7	5.6	4.4	3.6	4.3

Source: World Bank Global Economic Prospects (GEP) **September 2012** and World Development Indicators

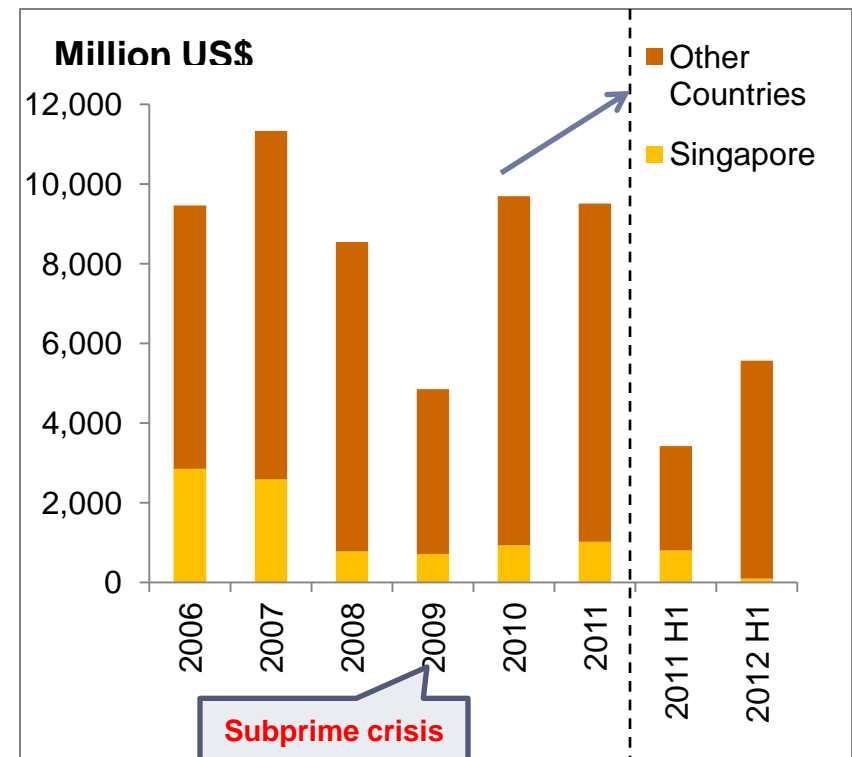
Challenges for Thailand

- **Significant slowdown in developed economies/markets and in China**
- **Competition from of other countries that are “catching up” with Thailand, especially China**
- **Higher risks of natural disasters**

Opportunities for Thailand

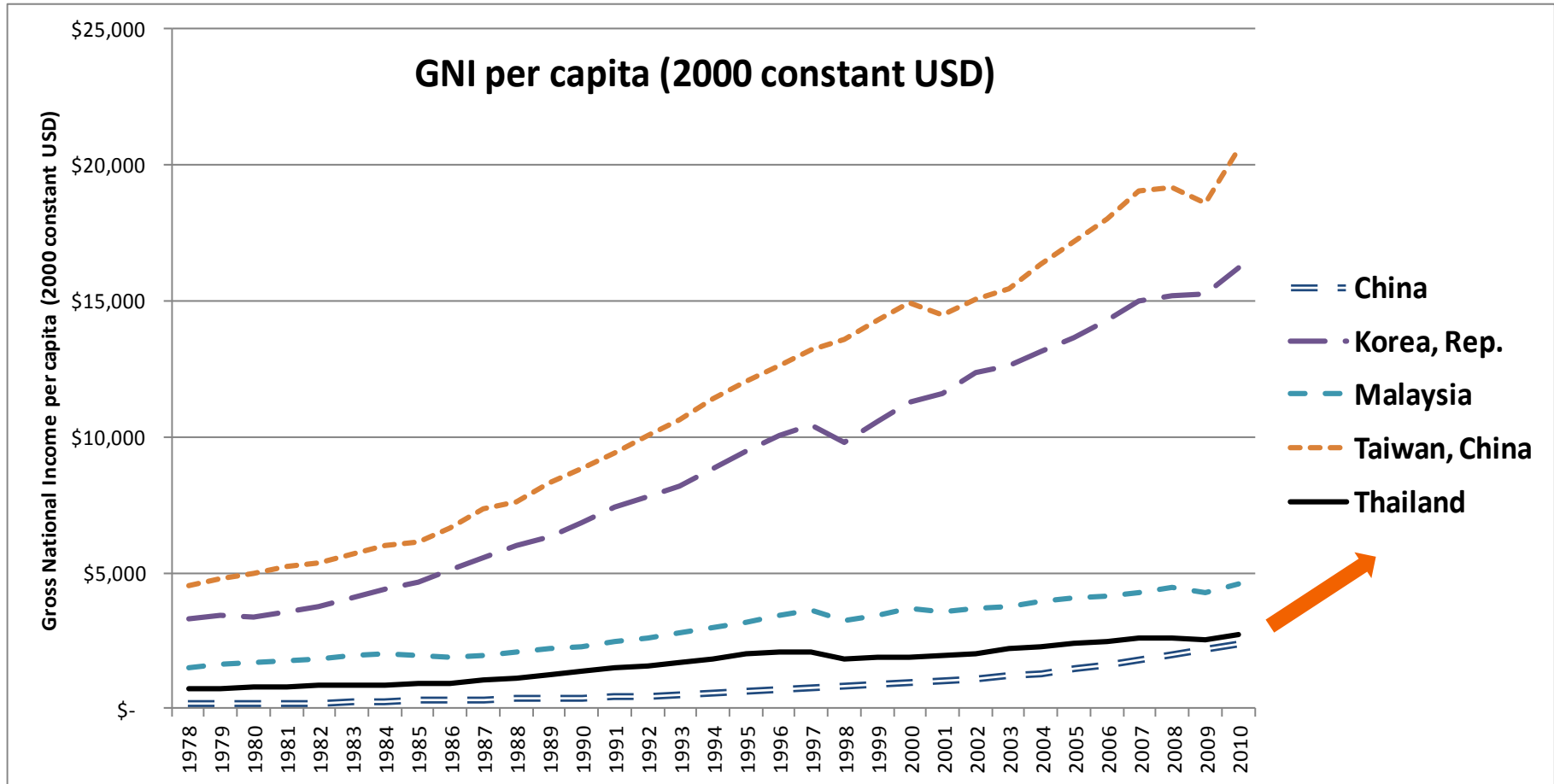
- A bigger middle-income class in ASEAN & China – higher purchasing power
- Greater investments/capital flows into East Asia
- Greater Regional integration and openness (AEC & FTAs)
- Slower increase in energy prices

FDI Inflows into Thailand



Source: Bank of Thailand and World Bank Staff Calculation

Competition is intensifying and Thailand should not be “left behind”



Source: World Development Indicators (World Bank)

2. WHAT DOES THAILAND NEED TO DO TO REMAIN COMPETITIVE IN THE INCREASINGLY COMPETITIVE WORLD?

Thailand needs to escape the “Middle Income Trap” and make sure Growth is “Inclusive”

- **Escaping the “Middle Income Trap”**

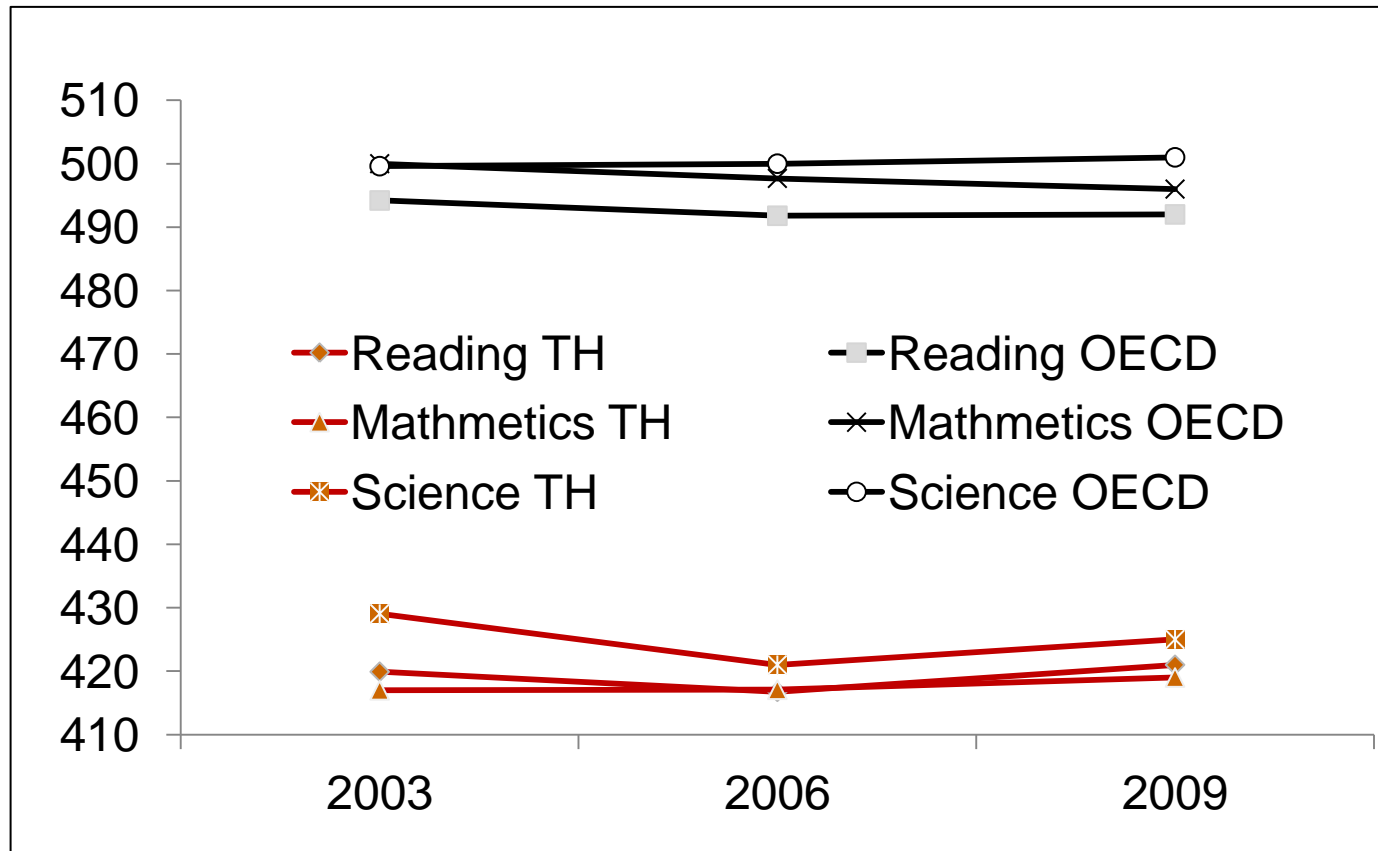
1. Training and education system needs to prepare labor force for a higher value-added economy
2. Unprotect the services sector to unleash its productivity and growth

- **Ensuring Inclusive growth**

- Further poverty reduction
- Reduce inequality of incomes and opportunities

1. Performance of Secondary School students in Thailand needs to be improved

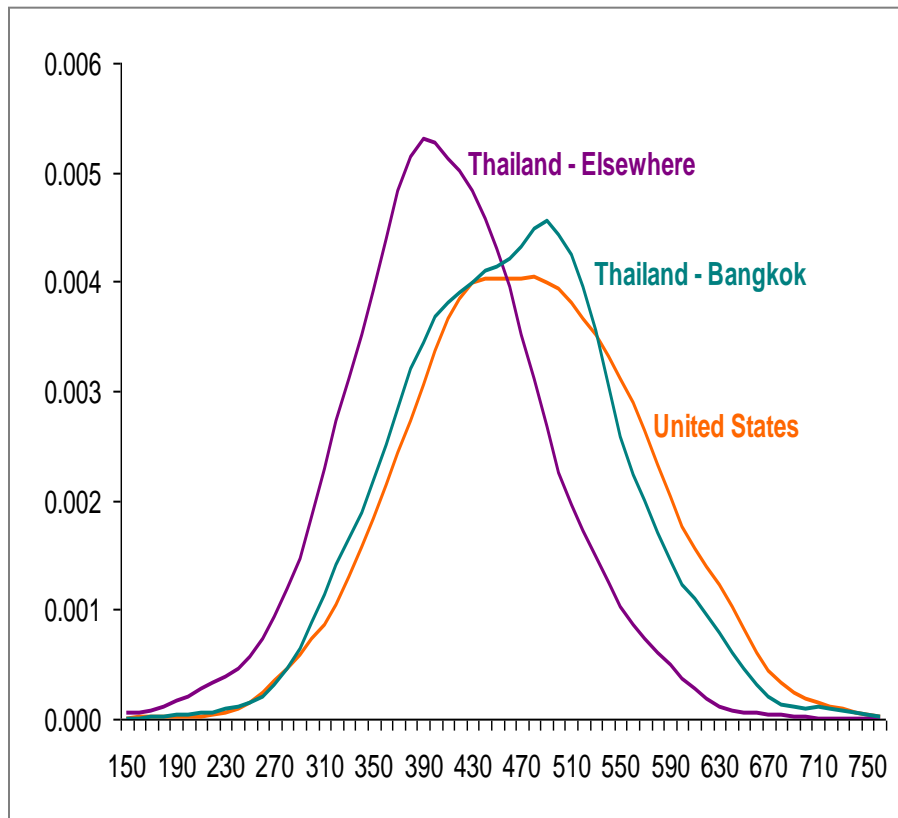
Average OECD and Thailand's PISA scores



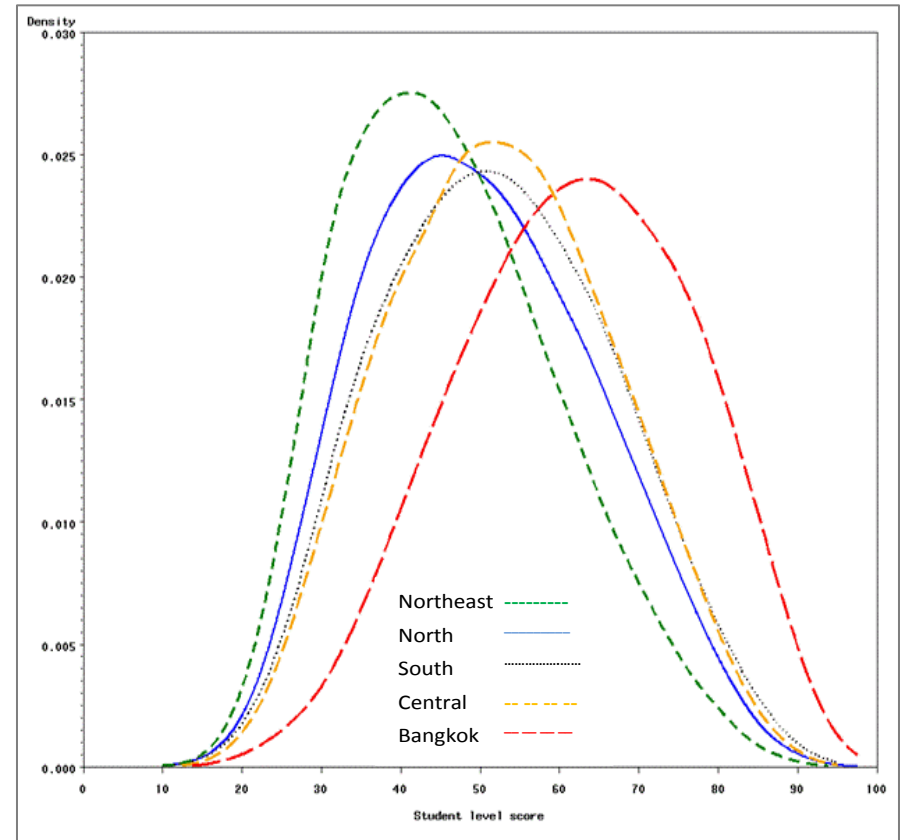
Source: PISA 2000-2009 Results (OECD database)

1. Regional difference in education outcomes needs to be narrowed

PISA Scores in Bangkok comparable to US



School level O-NET scores lowest in NE



Source: Office of Basic Education Commission database, in Parandekar 2011

1. Creativity, Leadership, Information Technology and English are needs to be improved

TABLE 2.4 Comparative skill gaps among professionals

	Creativity	Information technology	English	Leadership	Communication	Problem solving	Work attitude	Technical skills	Numeracy/literacy
Cambodia	—			Decision making		Lack of analytical skills			
Vietnam	—	—		—		—			
Mongolia									
Philippines									
Indonesia									
Thailand									
Malaysia									

Source: Appendix J (employer and employee surveys).

Note: The darker the shade, the stronger the gap (within each country only). Dotted cells indicate gaps that became less serious, and hashed cells indicate gaps that became more serious, in relation to the current demand for that skill.

— = not available

From World Bank Investment Climate Survey database

1. Thailand has fallen behind in moving towards a **Knowledge Economy**

World Bank's Knowledge Economy Index 2012*

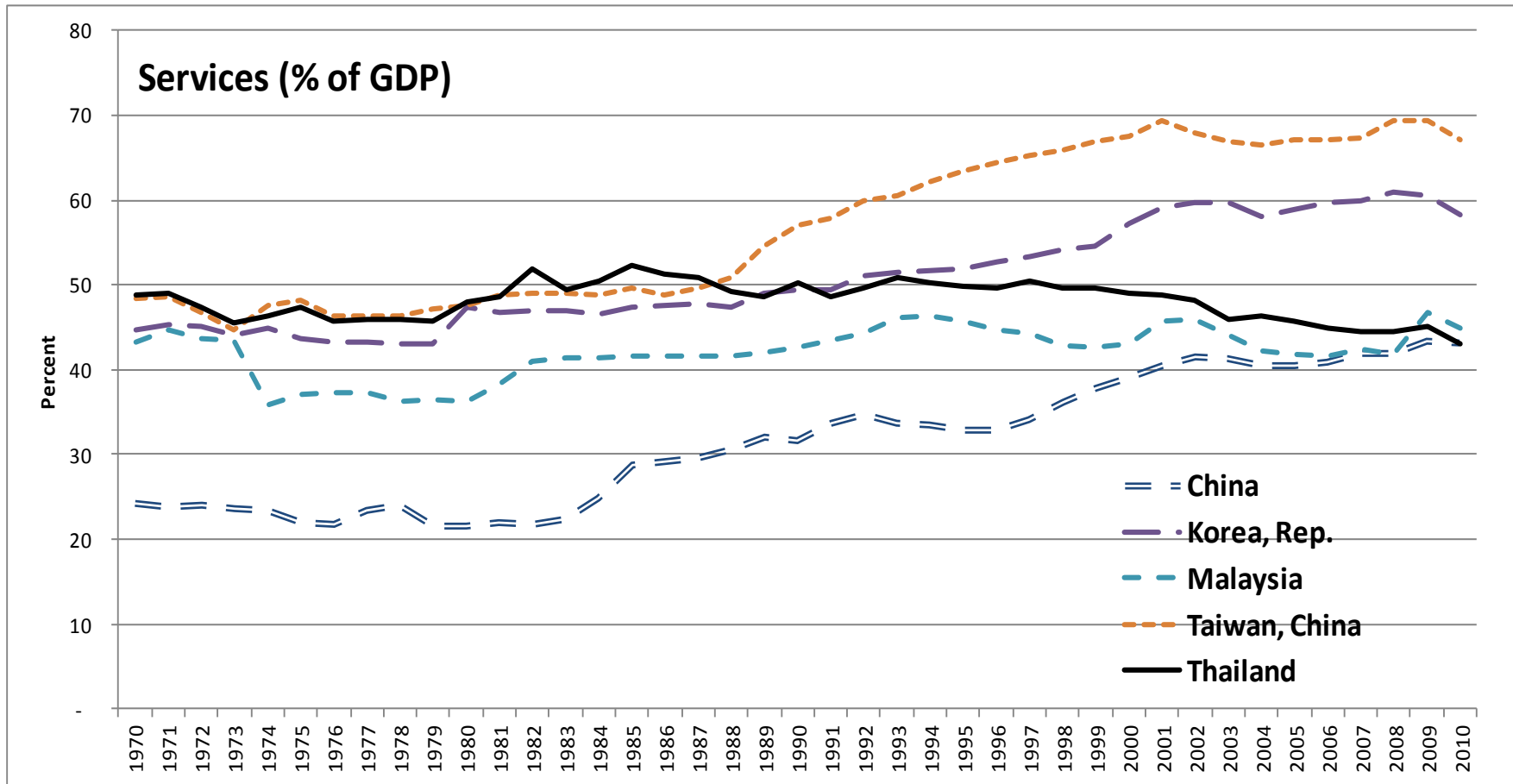
**Ranking Change
2012 from 2000**

1	0	Sweden
13	3	Taiwan, China
22	-5	Japan
23	-3	Singapore
29	-5	Korea, Rep.
48	-3	Malaysia
60	-1	Brazil
66	-6	Thailand
84	7	China
104	9	Vietnam

* KEI is a simple average of 4 sub-indexes which represents the 4 pillars of the knowledge economy: (1) economic incentive and institutional regime, (2) education and training, (3) innovation and technological adoption, and (4) information and communications technologies (ICT) infrastructure.

2. Share of services in Thailand has been falling

Share of Services in GDP

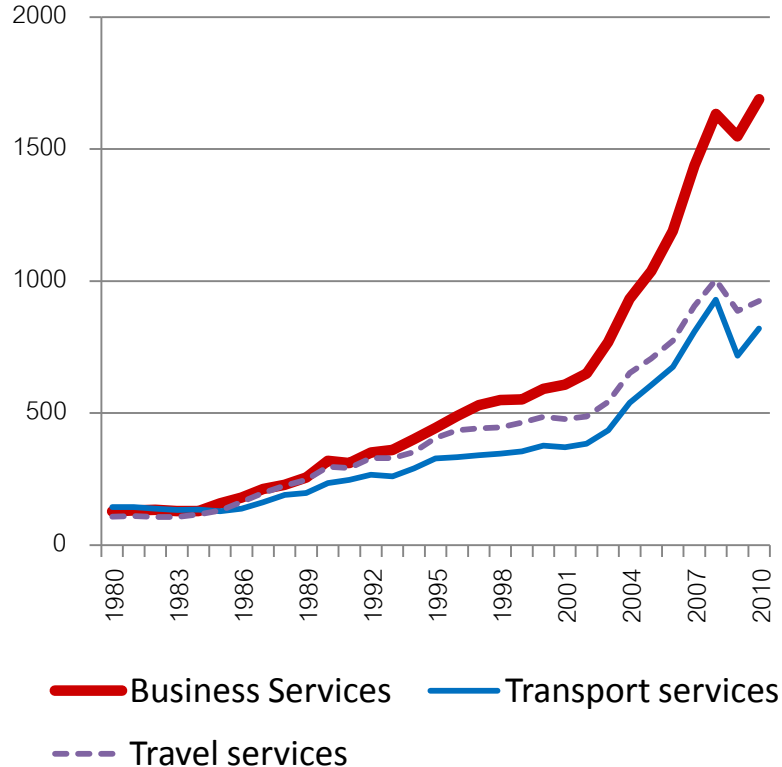


Source: World Development Indicators (World Bank)

2. Thailand's business services trade has been growing relatively slowly

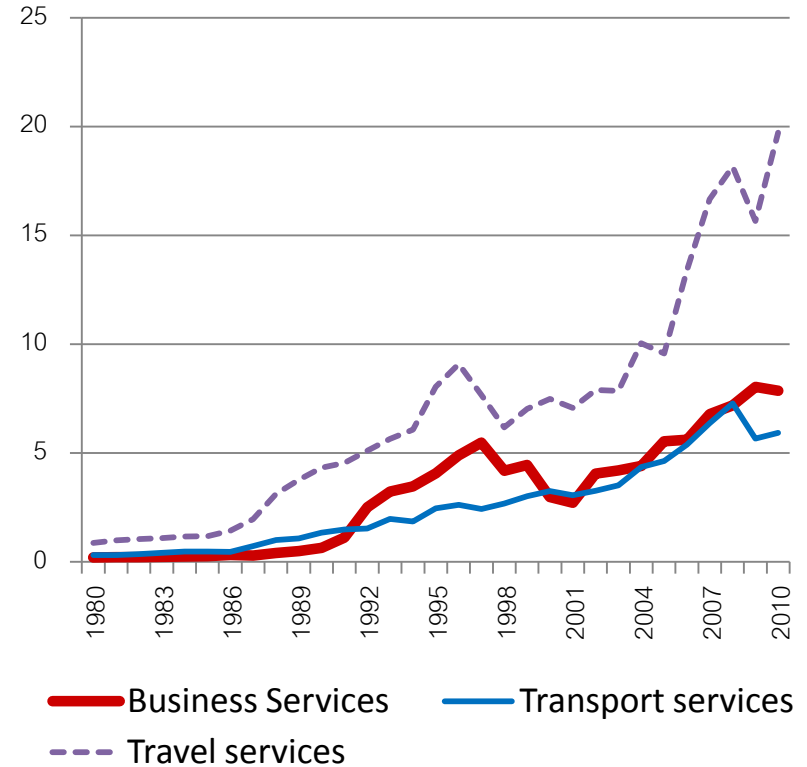
World

USD Billions (current\$)

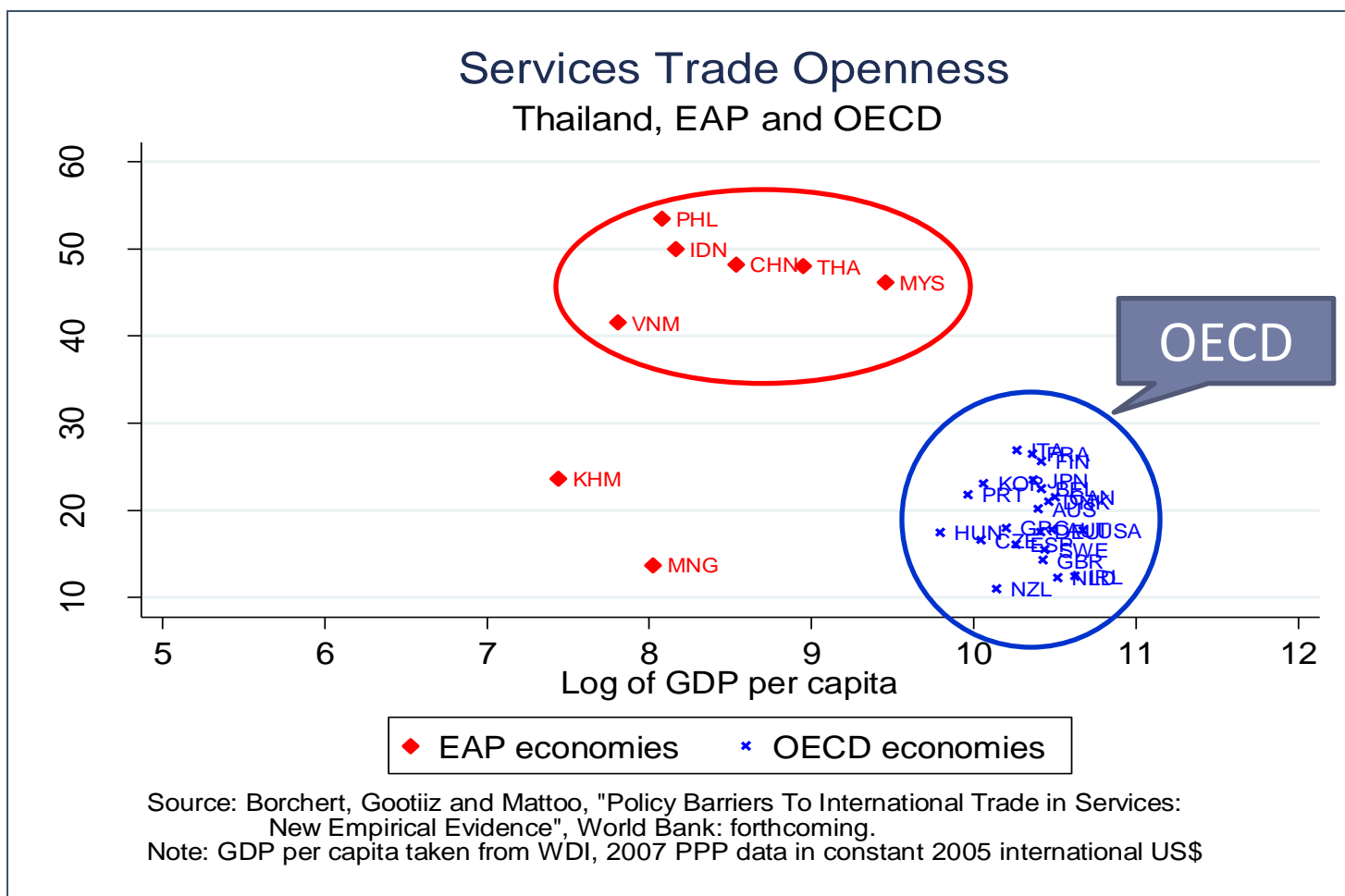


Thailand

USD Billions (current\$)

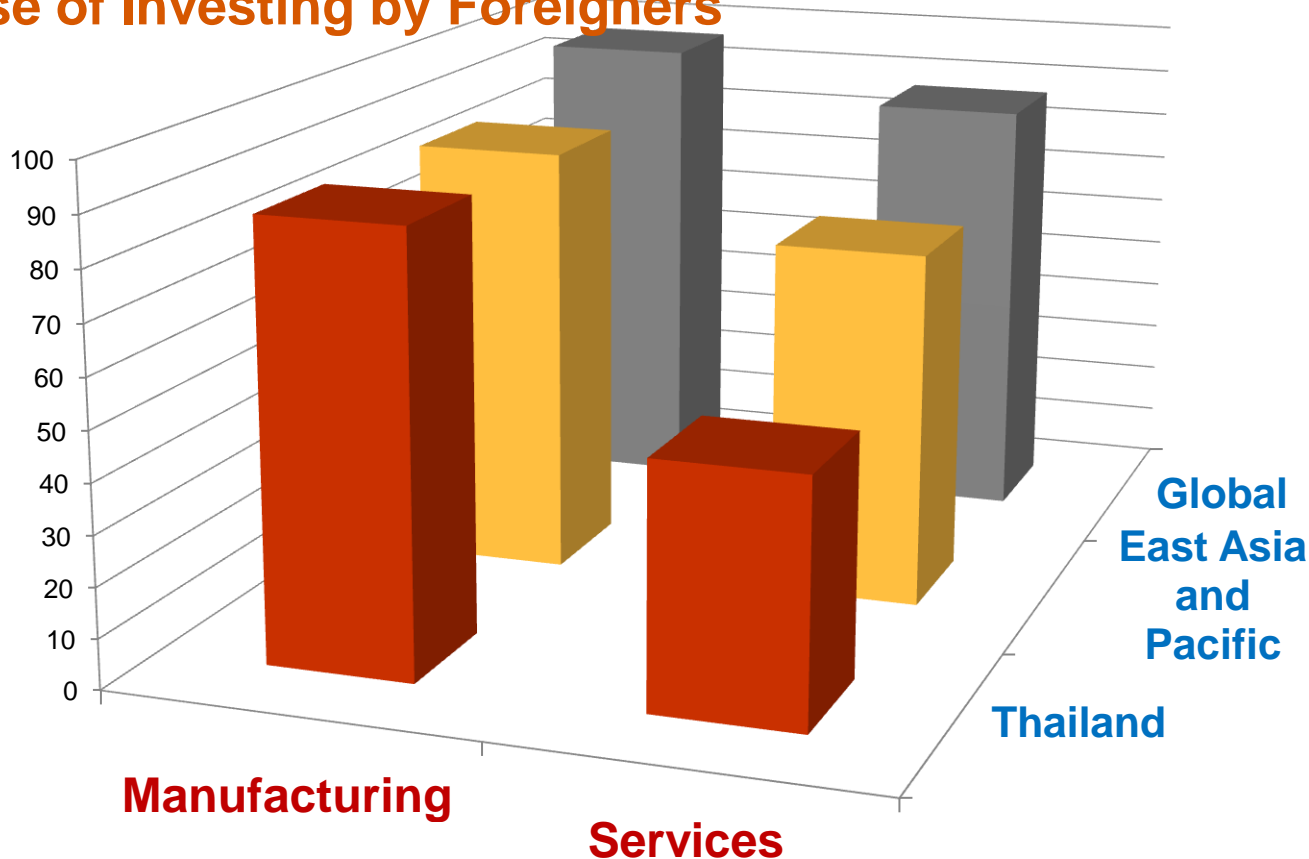


2. Thailand, along with ASEAN, have a high level of restrictiveness in business services trade



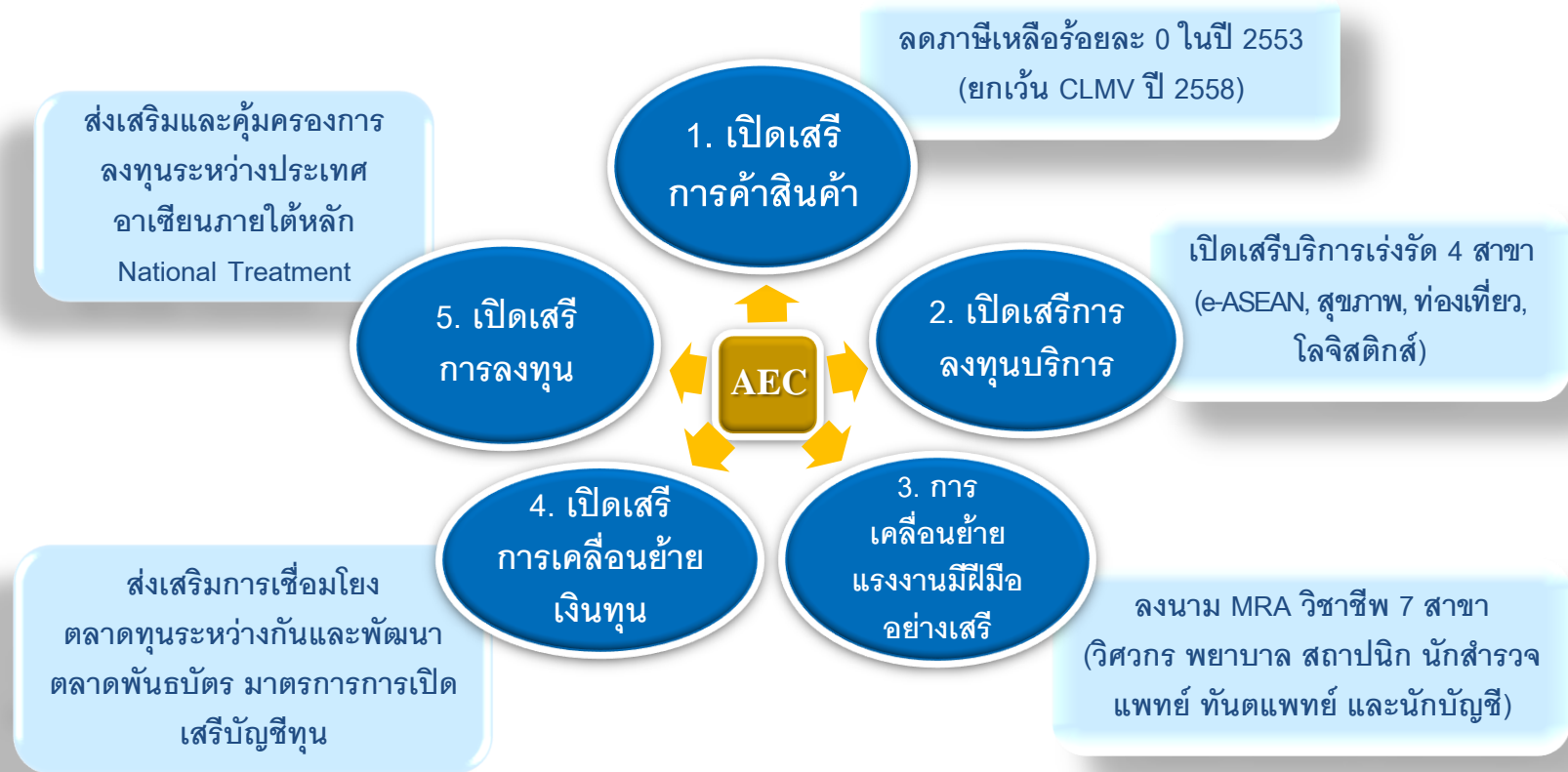
2. FDI in services is highly restricted in East Asia especially in Thailand

Ease of Investing by Foreigners



3. HOW CAN THE THAI PUBLIC SECTOR USE AEC AS AN OPPORTUNITY TO INCREASE THAILAND'S COMPETITIVENESS AND PROMOTE INCLUSIVE GROWTH IN THE NEW GLOBAL ECONOMY?

AEC Framework for an Integrated Market and Production Base



Thailand should use the AEC as an opportunity to

- ✓ Deepen trade integration
- ✓ Invest abroad
- ✓ Open to services trade
- ✓ Improve skill levels

THANK YOU



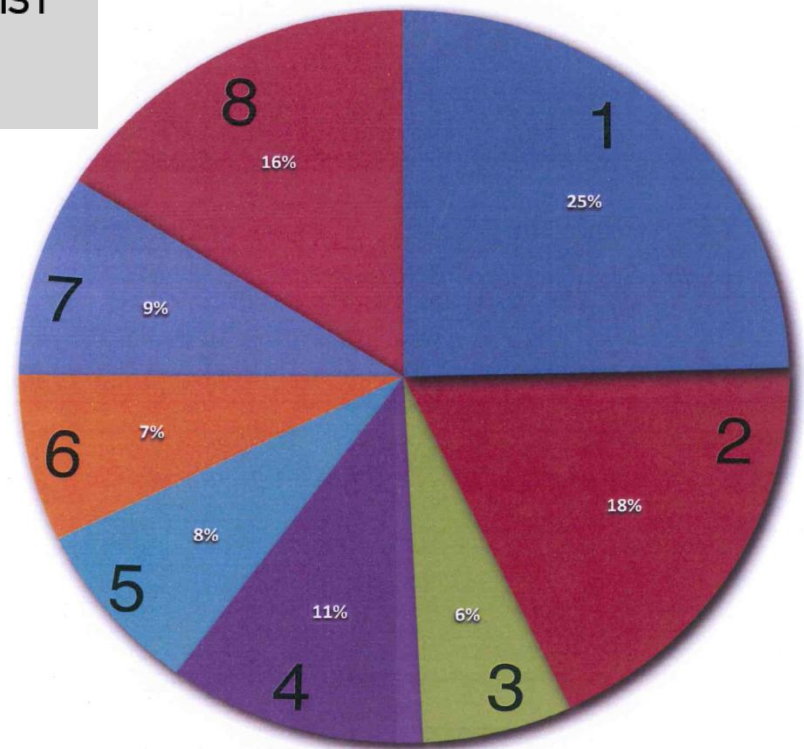
World Bank data and reports
can be downloaded at
www.worldbank.org

การสัมมนาวิชาการประจำปีระบบข้าราชการผู้มีผลสัมฤทธิ์สูง

14 กันยายน 2555



เพื่อให้ประเทศไทย “รุก” ไปข้างหน้า
สู่เป็นการเป็นศูนย์กลางของอาเซียน คุณคิดว่าภาคราชการของเรา
ควร “รุก” ขึ้นมาปรับเปลี่ยนอะไรบ้าง ?



- ข้อที่ 1 ปฏิเสธและต่อต้าน การคอร์รัปชัน
- ข้อที่ 2 ส่งเสริมคนดี มีความสามารถ
- ข้อที่ 3 ลดขั้นตอนการทำงาน
- ข้อที่ 4 ใช้ทรัพยากร และ งบประมาณอย่างคุ้มค่า
- ข้อที่ 5 พัฒนาผลงานอย่างต่อเนื่อง
- ข้อที่ 6 ส่งเสริมความเสมอภาคภายในหน่วยงาน
- ข้อที่ 7 พัฒนาทักษะด้วยภาษาต่างประเทศ
- ข้อที่ 8 ประสานความร่วมมือกับหน่วยงานต่างๆ ทั้งในประเทศ และต่างประเทศ