

โอกาสและความท้าทายของประเทศไทยในอนาคต Thailand 2020



Apirak Kosayodhin
Advisor to Prime Minister of Thailand

Thailand has significantly changed in the past 20 years Improved quality of life and a shift away from agriculture

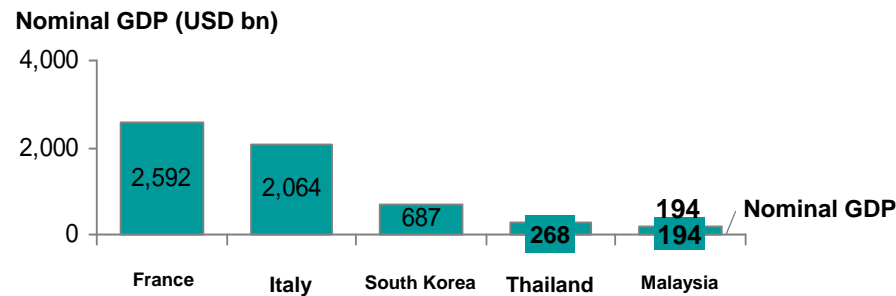
		1988	Thailand 2008	Singapore 2008	Malaysia 2008
Economic	Exports of G&S (% of GDP)	33.01	75.70	238.60	111.50
	Agriculture/ GDP	14.71	10.80	0	9.70
	Industry/ GDP	36.05	45.80	33.80	44.40
	Services/ GDP	49.24	43.40	66.20	45.90
	GDP per head (\$ at PPP)	2,240.00	8,340.00	43,490	14,110
	Net Direct Investment flow/ GDP	1.79	2.90	123.20	43.90
Social	Mortality rate, under -5 (per 1,000)	N/A	8	3	12
	Life expectancy at birth (years)	68	70	80	74
	School enrollment, primary (% net)	N/A	94.2	78 ¹	99
	Income shared held by lowest 20%	5.00	6.10	49	54
Environ mental	Agricultural land (% of land area)	42.00	36.40	1.2	24
	Energy used (kg of oil equiv/ capita)	637	1,588	7,056	2,389
	Electric power consumption (kWh / capita)	562	1,988	8,507	3,262

Note: World bank, EIU
¹ UNESCO data from 2002

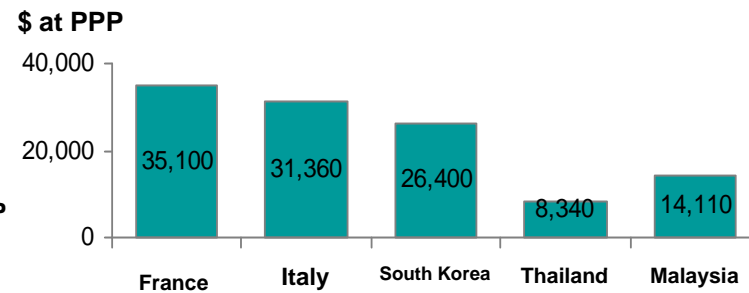
What awaits Thailand?

Comparison to selected countries

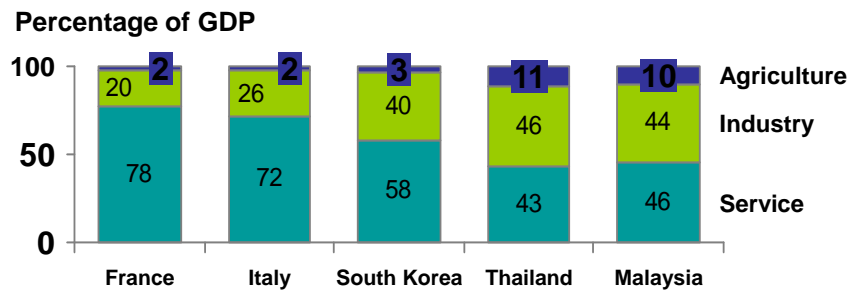
Countries with similar profile are up to ~10x wealthier than Thailand



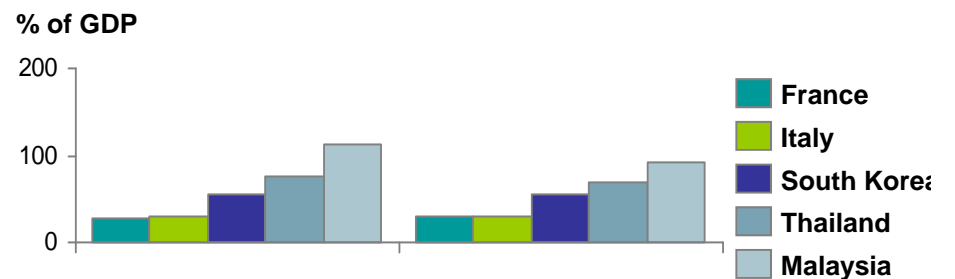
Potential to triple per-capita income?



Sector mix may need to be shaped



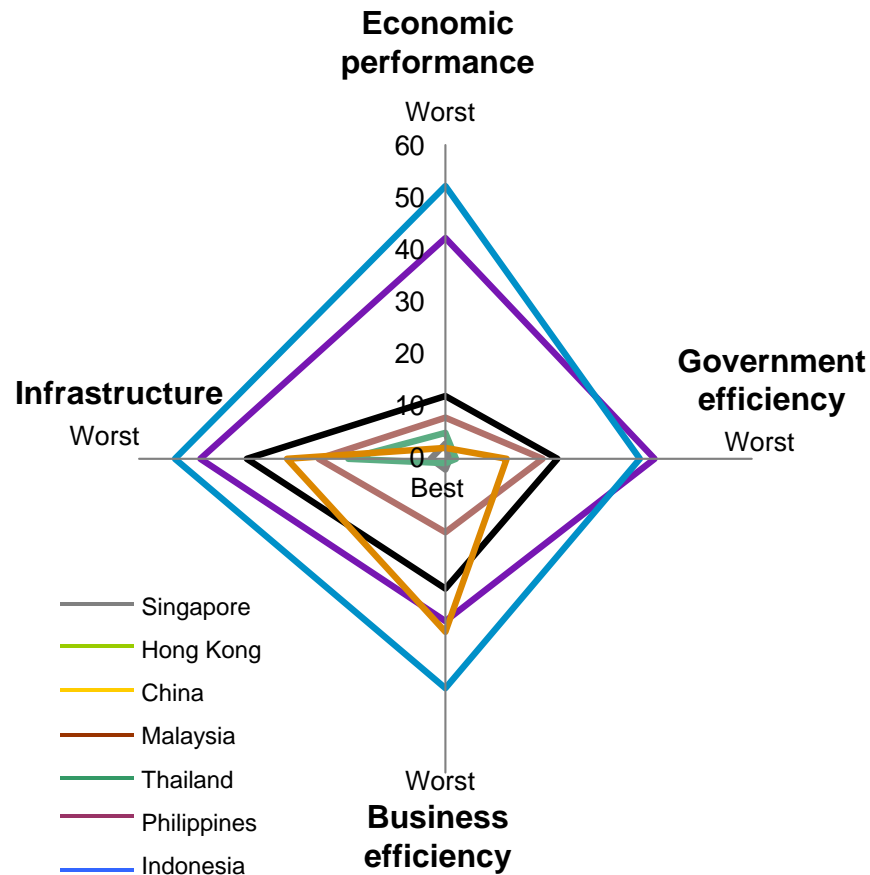
Domestic sectors may grow in importance



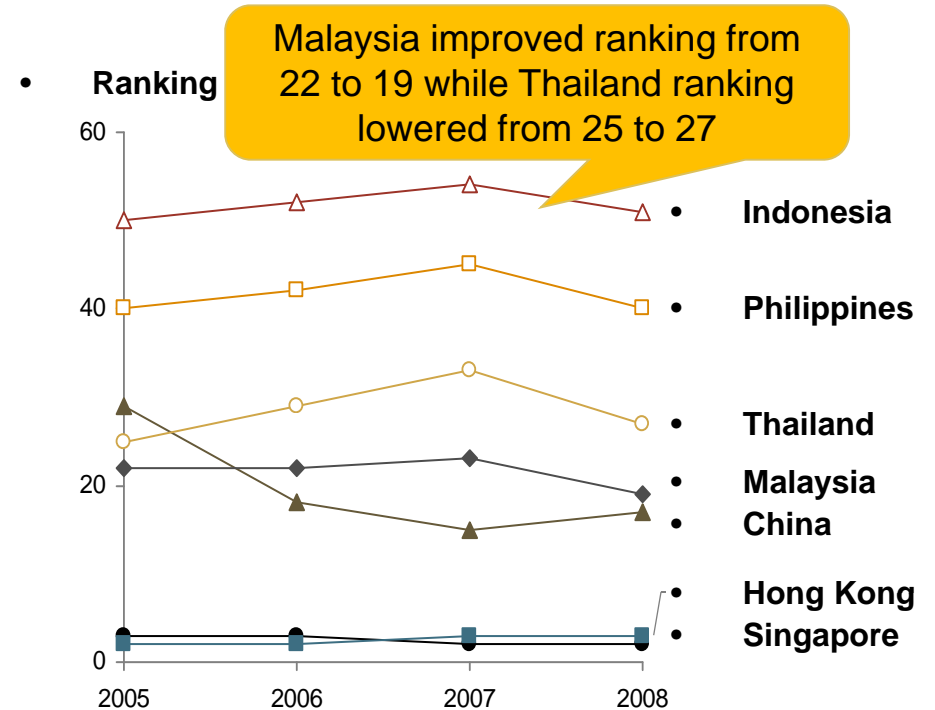
Note: Countries with similar population size and geographic size
Source: EIU 2008 data

Thailand more competitive than Philippines and Indonesia, but lags behind Malaysia

IMD 2008 Ranking in selected Asian countries

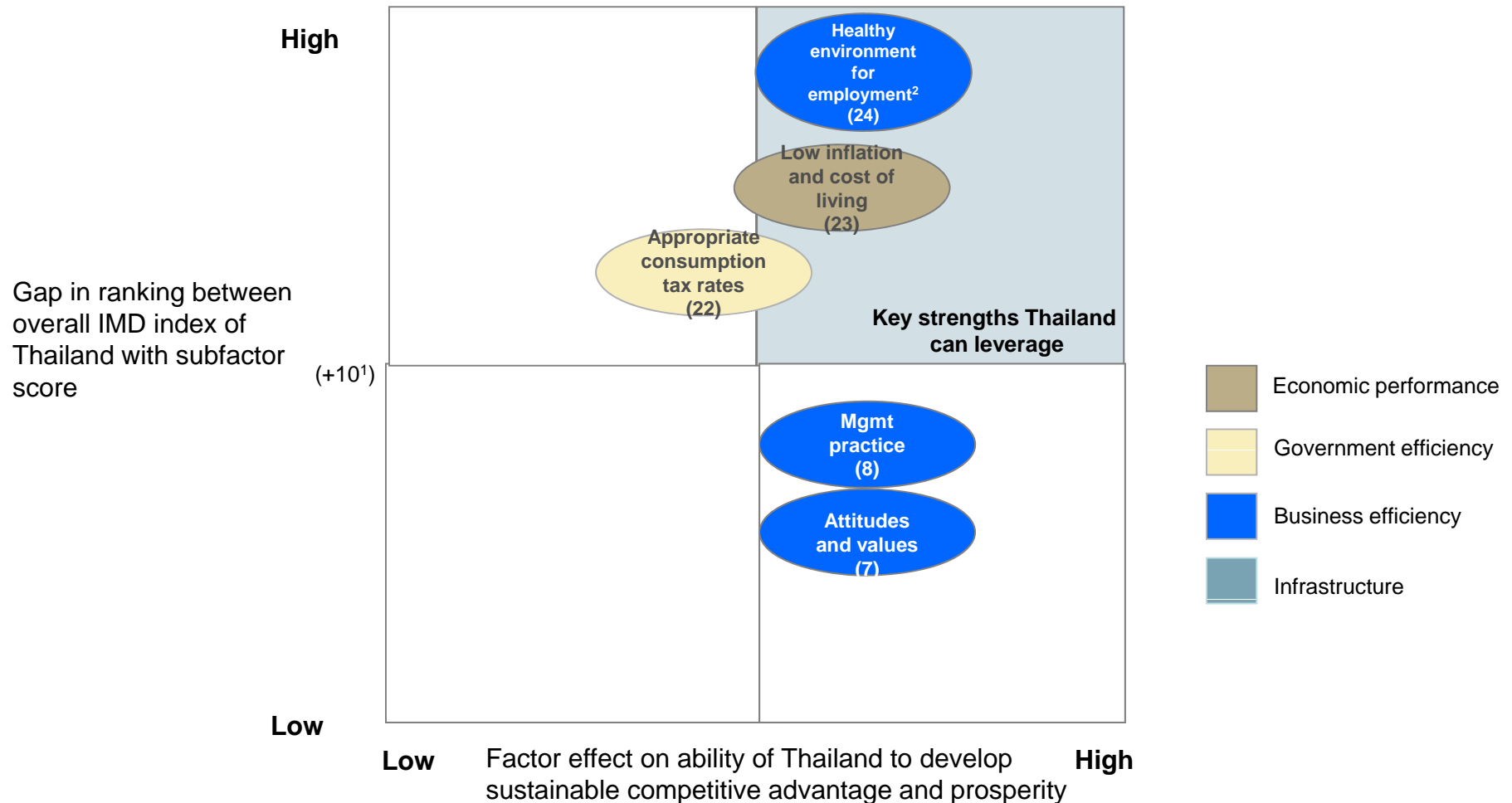


IMD 2005-2008 Overall Ranking



Thailand's major strengths are low cost of living and healthy environment for employment

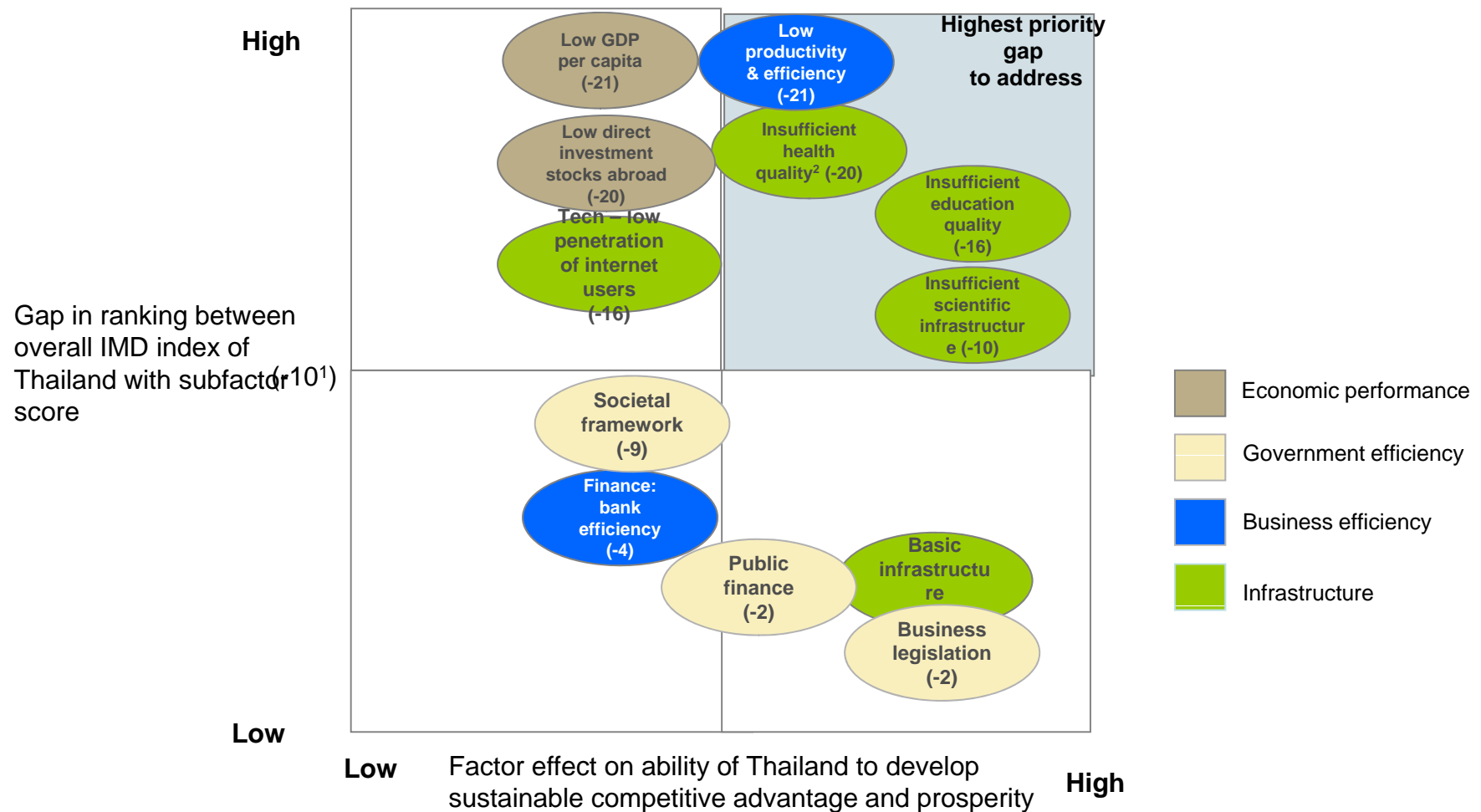
IMD competitive ranking analysis of major strengths



1. Difference between overall IMD ranking of Thailand (27) and sub factor scores. Use 10 to approximate 1 standard deviation difference. Source: IMD Competitiveness Report 2008
2. Healthy environment for employment contains fair compensation level, high employment rate and high labor force number and business friendly regulations

Infrastructure and business efficiency identified as major weaknesses of Thailand

IMD competitive ranking analysis of major weaknesses

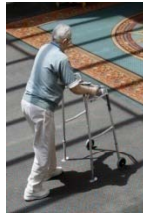


1. Difference between overall IMD ranking of Thailand (27) and sub factor scores. Use 10 to approximate 1 standard deviation difference. Source: IMD Competitiveness Report 2008
 2. Weakness in low number of care providers

Several mega-trends with high relevance on Thailand's future development

People

- 1 Aging society



- 2 Urbanization



- 3 Health & safety concerns



- 4 International mobility



- 5 Connectivity



Environment

- 6 Climate changes



- 7 Scarcity and deteriorating quality of resources



Business

- 8 Shifting economic leadership to Asia



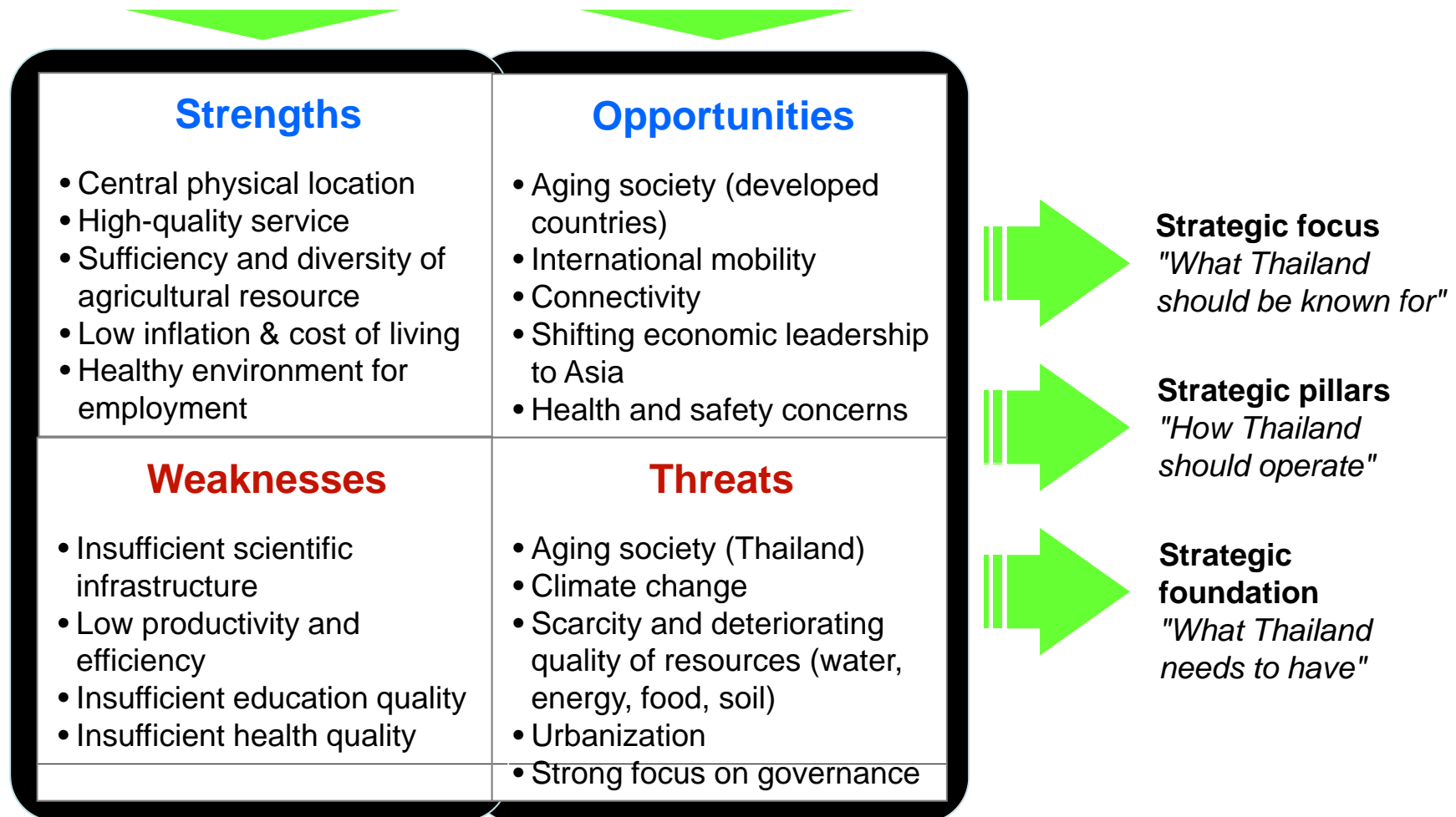
- 9 Stronger focus on governance



SWOT analysis for Thailand shows several opportunities for action

Competitiveness analysis

Mega-trend analysis



Potential 2020 vision for Thailand

Transformation from commodity supplier to high value, branded, green economy

Strategic Focus

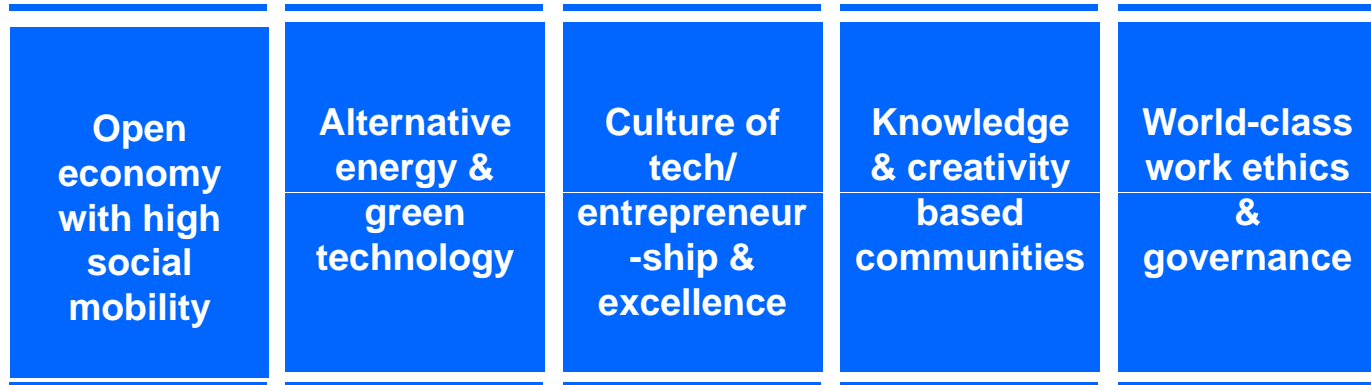
"What Thailand should be known for"

High value-added economy

- 1 World's food supplier
- 2 Leader in creative products
- 3 Magnet for cultural & eco-tourism high-value added services
- 4 Regional logistics hub

Strategic pillars

"How Thailand should operate"



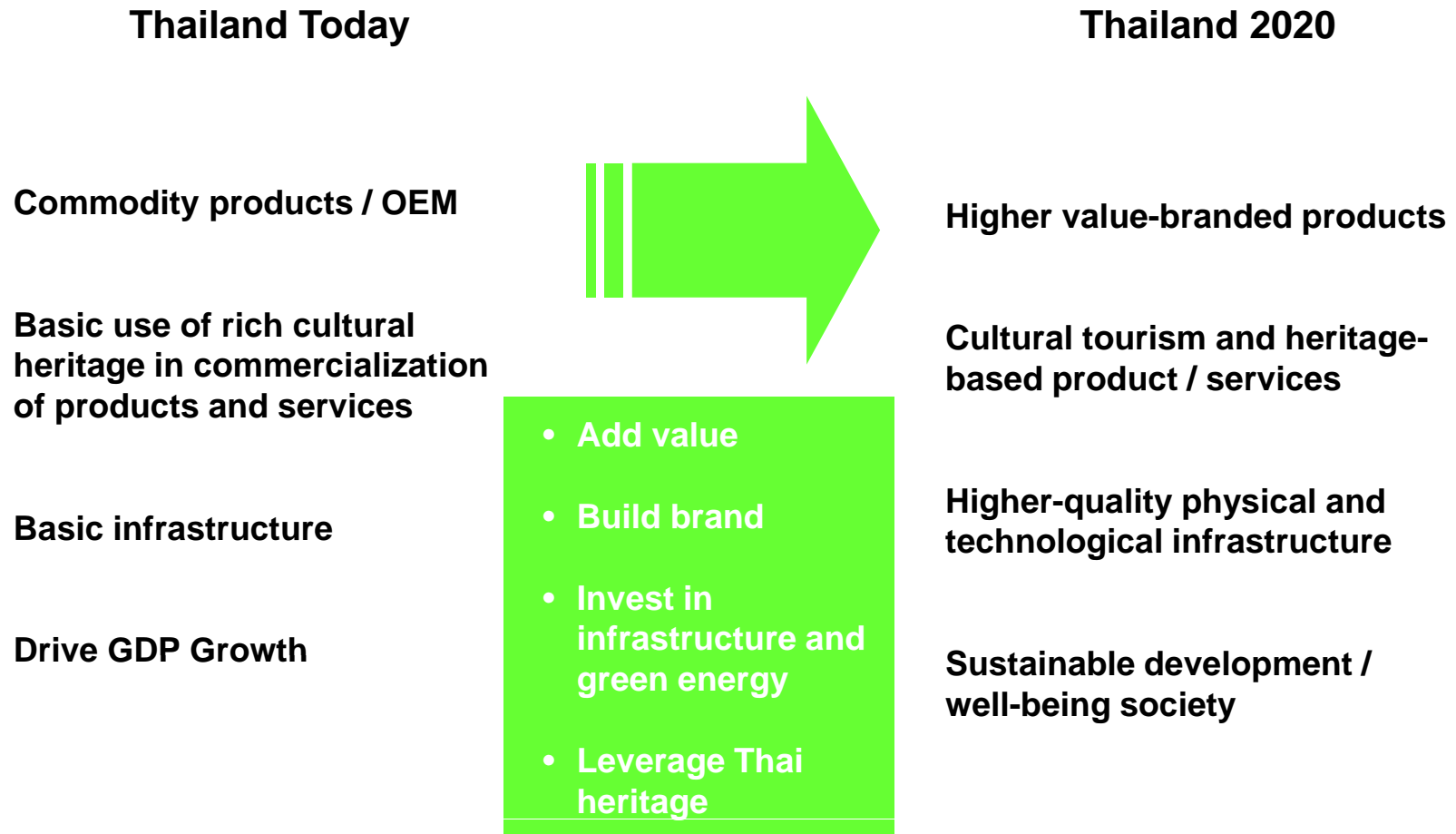
Foundation

"What Thailand needs to have"



Transformation towards sustainable higher value green economy and well-being society

National agenda is key to drive transformation



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