



BEYOND THE CRISIS AND THE NEED TO THINK BEYOND POLITICS: A Post-2022 National Elections Analysis

OFFICIAL CANVASS OF RESULTS: **PRESIDENT**

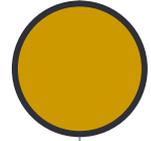
Based on 171 of 173 certificates of canvass as of May 25, 2022 (3:28 PM)

	Candidates	Votes	Percent
1	Marcos, Bongbong (PFP)	31,629,783	58.77%
2	Robredo, Leni (IND)	15,035,773	27.94%
3	Pacquiao, Manny Pacman (PROMDI)	3,663,113	6.81%
4	Domagoso, Isko Moreno (Aksyon)	1,933,909	3.59%
5	Lacson, Ping (PDR)	892,375	1.66%

OFFICIAL CANVASS OF RESULTS: VICE PRESIDENT

Based on 171 of 173 certificates of canvass as of May 25, 2022 (3:28 PM)

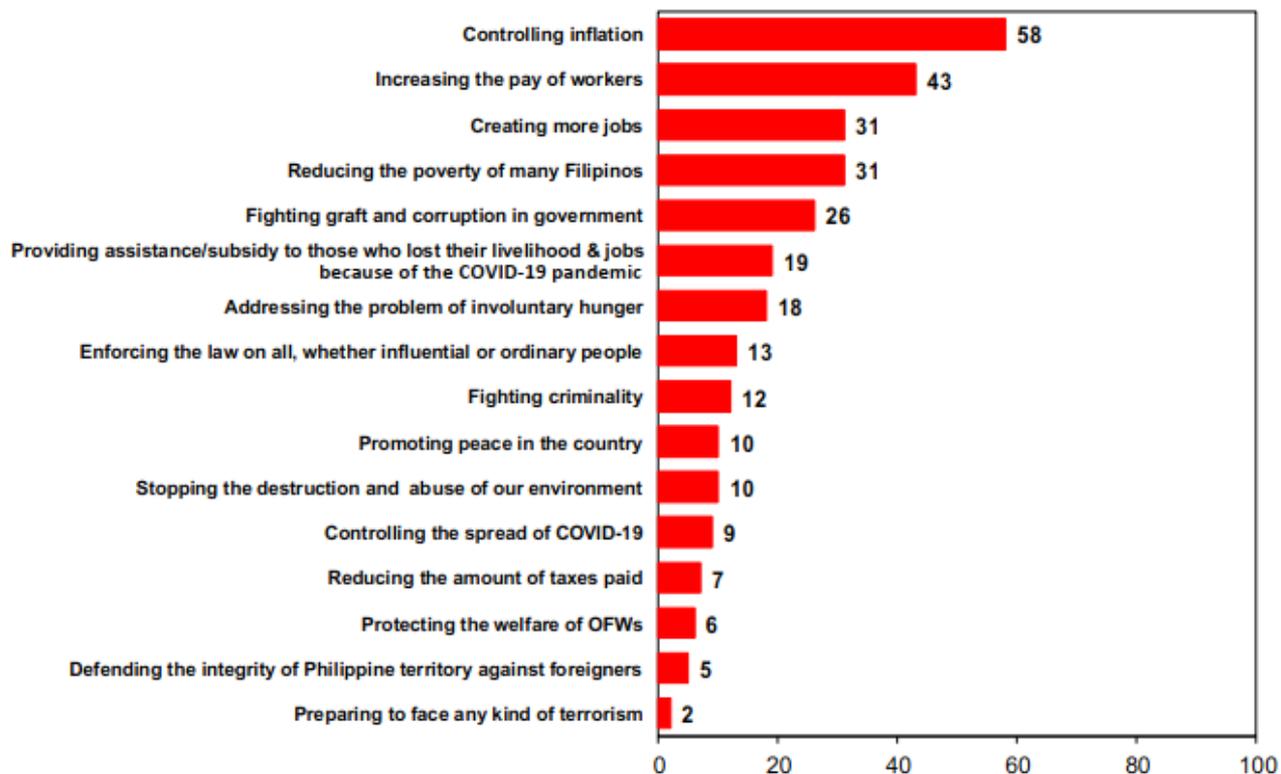
	Candidates	Votes	Percent
1	Duterte, Sara (LAKAS)	32,208,417	61.53%
2	Pangilinan, Kiko (LP)	9,329,207	17.82%
3	Sotto, Vicente Tito (NPC)	8,251,267	15.76%
4	Ong, Doc Willie (AKSYON)	1,878,531	3.59%
5	Atienza, Lito (PROMDI)	270,381	0.52%



Issues the Marcos Administration Faces

MOST URGENT NATIONAL CONCERNS

March 17 - 21, 2022 / Philippines
(In Percent / Multiple Response Allowed)



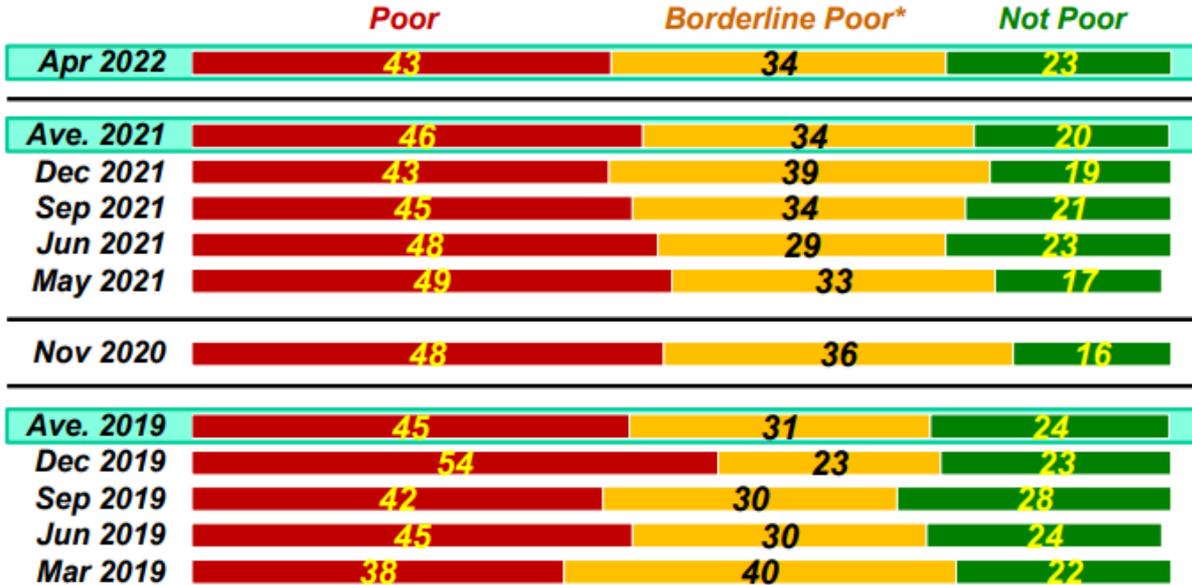
COMPARATIVE RATINGS OF THE NATIONAL ADMINISTRATION ON SELECTED NATIONAL ISSUES

December 2021 and March 2022 / Philippines
(In Percent)

Selected National Issues	Approval		Change*	Undecided		Change*	Disapproval		Change*
	PR1&2	UB	Mar22	PR1&2	UB	Mar22	PR1&2	UB	Mar22
	Dec 21 (A)	Mar 22 (B)	minus Dec21 (B - A)	Dec 21 (C)	Mar 22 (D)	minus Dec21 (D - C)	Dec 21 (E)	Mar 22 (F)	minus Dec21 (F - E)
Stopping the destruction and abuse of our environment	57	54	- 3	29	32	+ 3	14	14	0
Fighting graft and corruption in government	57	51	- 6 ↓	25	27	+ 2	18	22	+ 4
Defending the integrity of Philippine territory against foreigners	50	48	- 2	29	32	+ 3	21	20	- 1
Increasing the pay of workers	52	45	- 7 ↓	26	30	+ 4	22	25	+ 3
Creating more jobs	52	44	- 8 ↓	28	36	+ 8	20	21	+ 1
Reducing the poverty of many Filipinos	42	36	- 6 ↓	30	32	+ 2	28	32	+ 4
Controlling inflation	43	28	- 15 ↓	25	28	+ 3	33	44	+11 ↑

*Change = Figures of March 2022 minus Figures of December 2021 .

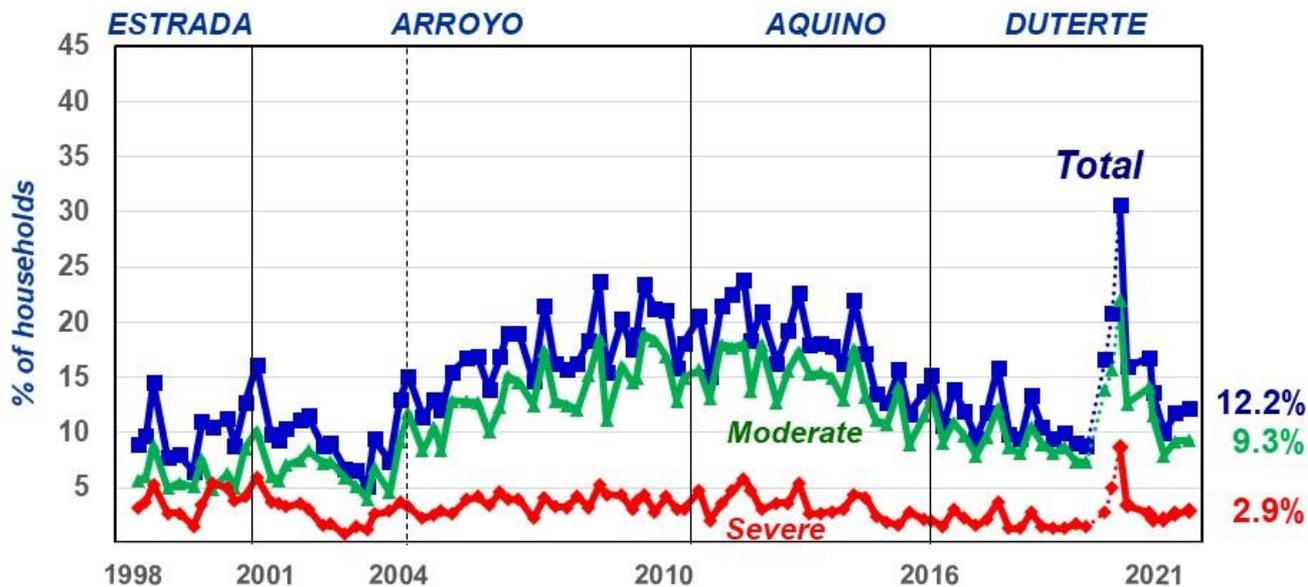
SELF-RATED POVERTY: FAMILIES WHO ARE “MAHIRAP”: PHILIPPINES, MAR 2019 TO APR 2022



Self-Rated Poverty Question: Where would you place your family in this card? (Not poor, On the line, Poor)

**Those who pointed to the horizontal line separating the options MAHIRAP (poor) and HINDI MAHIRAP (not poor) are classified as 'Borderline Poor.'*

TOTAL, MODERATE, AND SEVERE HUNGER: PHILIPPINES, JUL 1998 – APR 2022



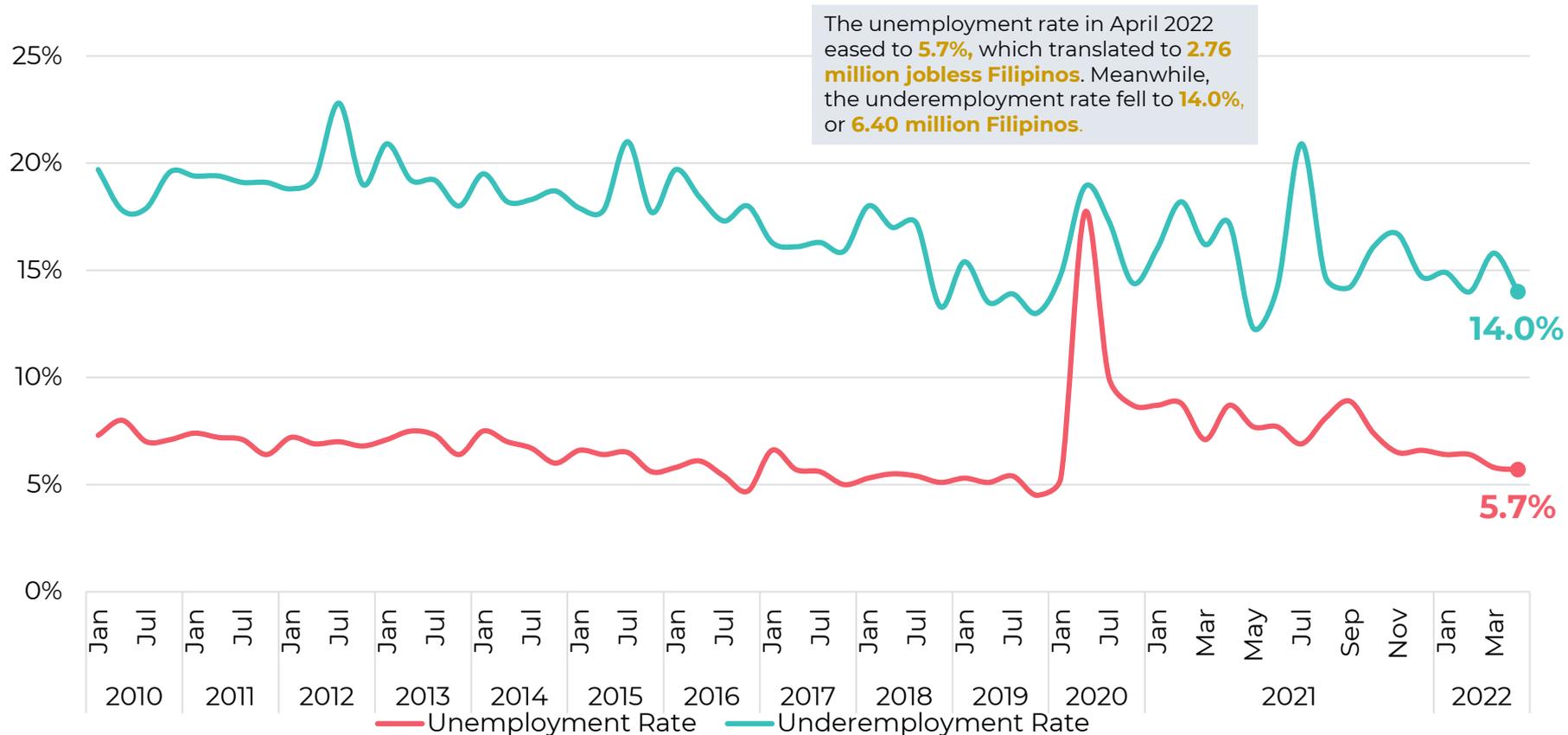
Note: Don't Know and Refused responses are not shown. All points connected by broken lines are from mobile phone surveys. Face-to-face interviewing resumed in November 2020.

Q: In the last 3 months, did it happen even once that your family experienced hunger and not have anything to eat?

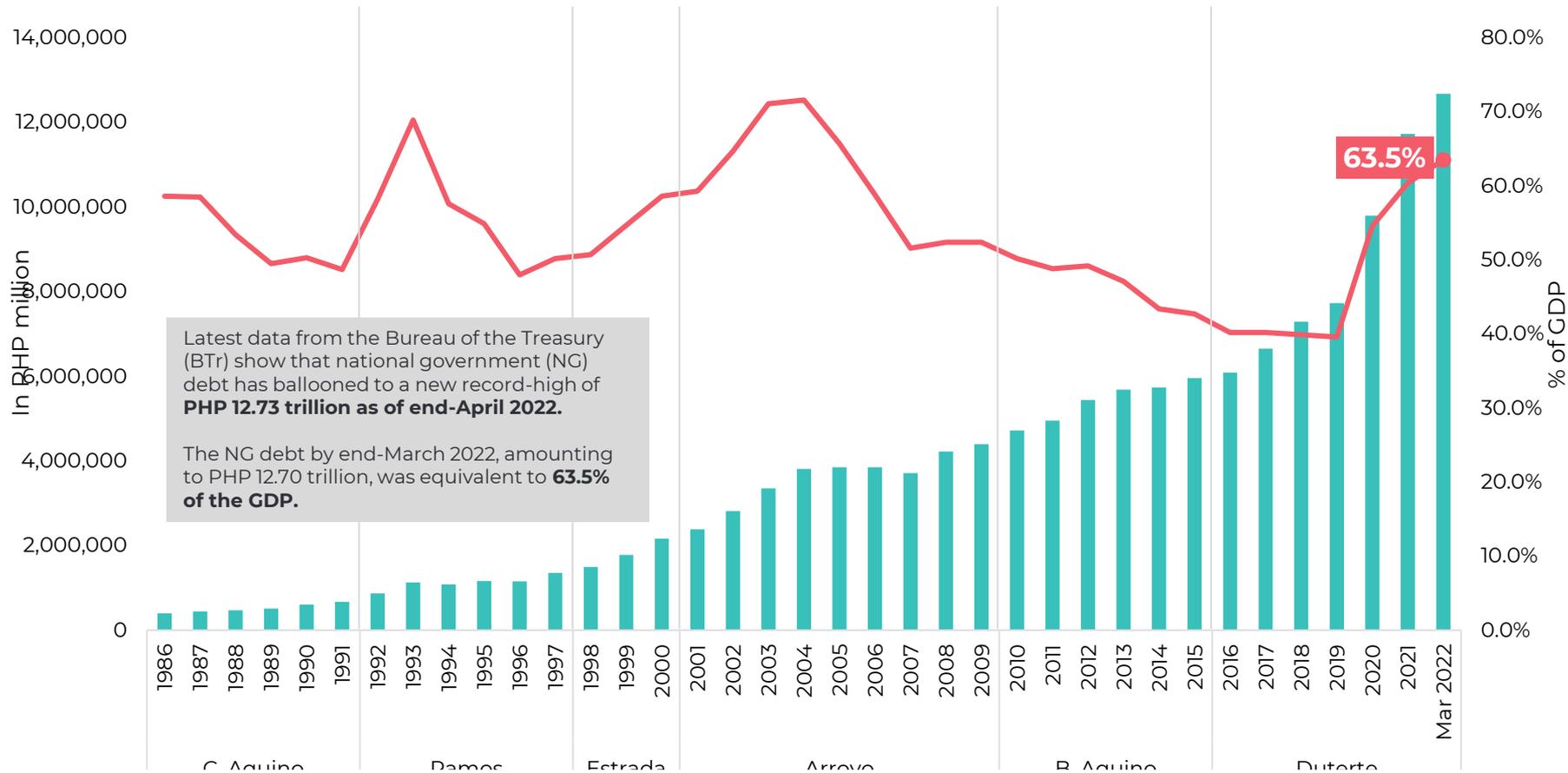
[Moderate: Only once + A few times; Severe: Often + Always]

Unemployment Rate and Underemployment Rate

January 2010 – April 2022

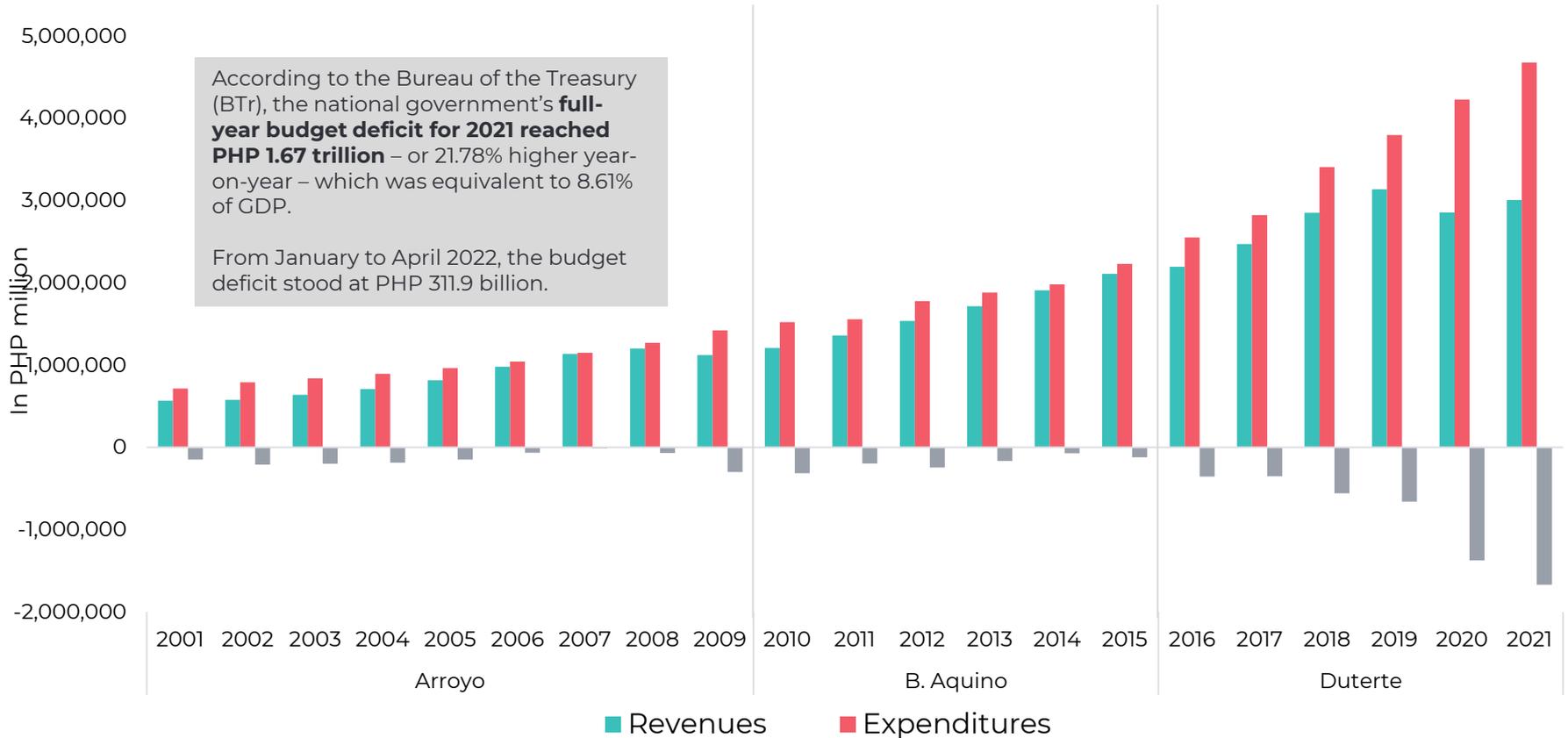


National Government Debt and as % of GDP, 1986-2022



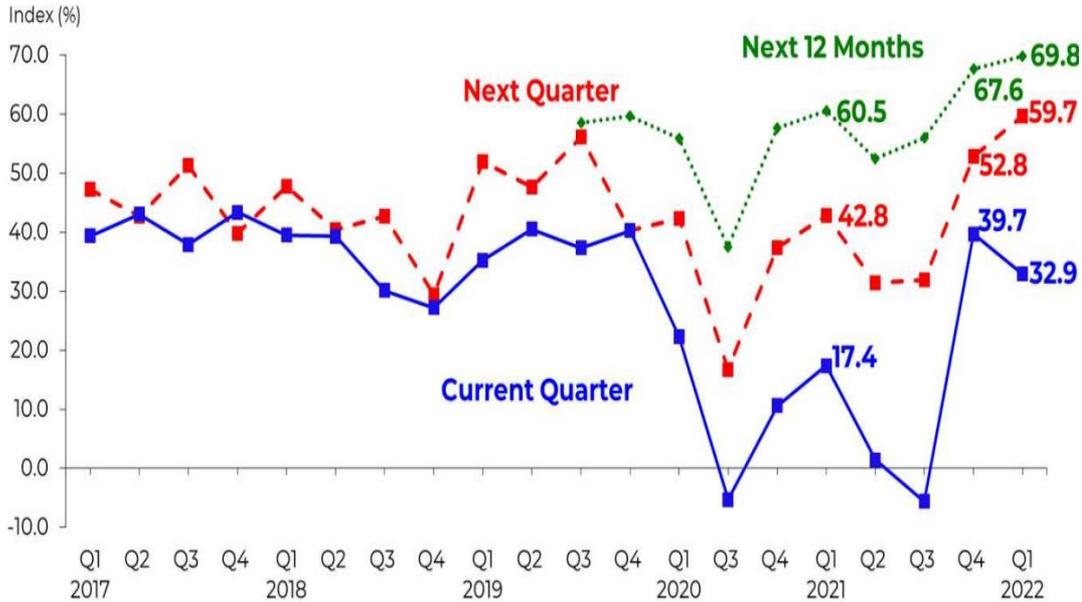
Source: Bureau of the Treasury (BTr)

National Government Fiscal Balance, 2001-2021



Overall Business Outlook Index

Q1 2017 – Q1 2022



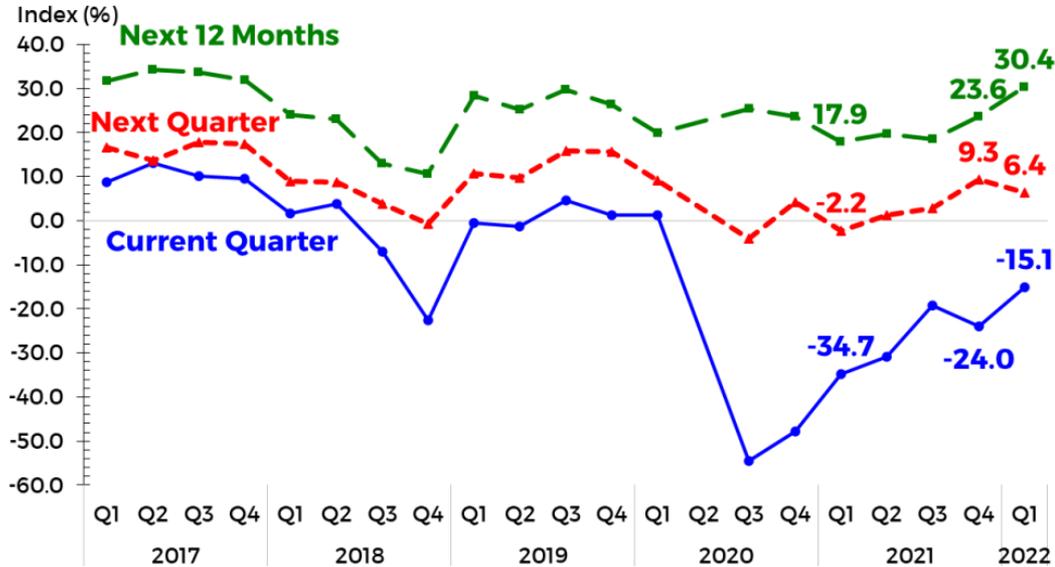
Despite remaining positive, business confidence in the Philippine economy weakened in Q1 2022 as the **overall confidence index (CI) decreased to 32.9% from 39.7% in Q4 2021.**

This less optimistic outlook was largely affected by the **surge in COVID-19 cases** due to the Omicron variant and the consequent **stricter quarantine restrictions** at the start of the year.

Other factors that contributed to this weaker business confidence were the following: (1) **increase in prices of raw materials and fuel**; (2) **decrease in sales/demand for certain goods and services**; (3) **weakening peso**; and (4) adverse impact of **natural calamities** (i.e., Typhoon Odette).

Overall Consumer Outlook Index

Q1 2017 – Q1 2022

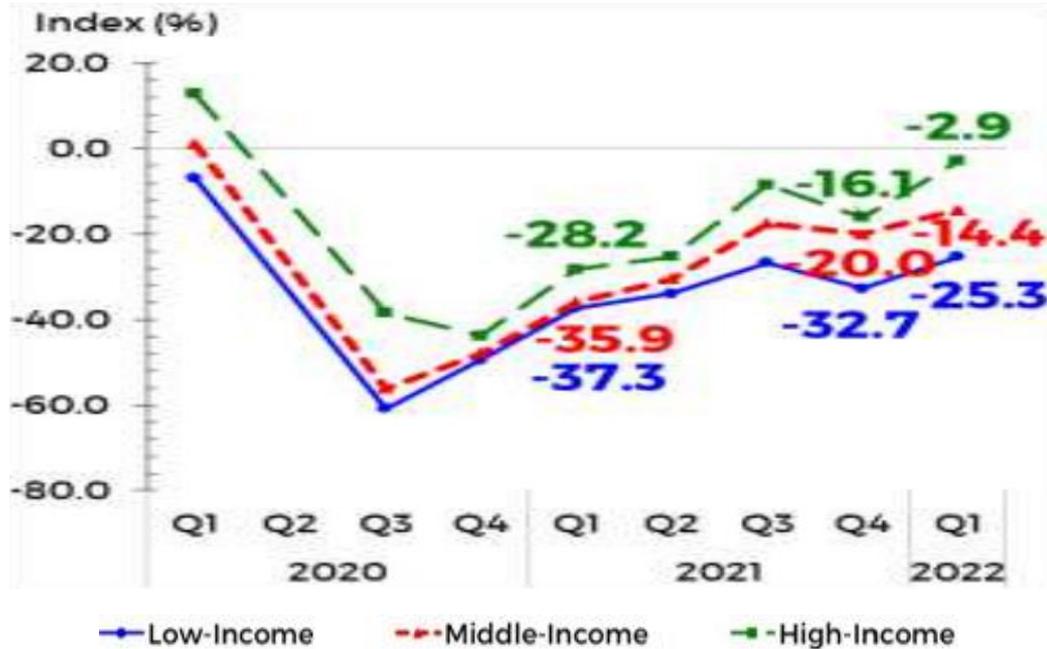


Consumer sentiment in the Philippines became less pessimistic in Q1 2022 as the **overall confidence index (CI) increased to -15.1% from -24.0% in Q4 2021.**

This improved outlook was due to consumers' expectations of: (1) **availability of more jobs and permanent employment**; (2) **additional and high income**; and (3) **effective government policies and programs**, such as the easing of quarantine restrictions, availability and rollout of vaccines, and provision of financial assistance.

Consumer Outlook Index, by Income Group

Q1 2020 – Q1 2022



Consumer confidence across all income groups improved in Q1 2022.

Aside from the reasons cited for the less pessimistic outlook in Q1 2022, consumer confidence for the low- and high-income groups improved as they **anticipated more harvest and additional working family members**, respectively.

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ACTIONS THAT THE NEXT ADMINISTRATION SHOULD FOCUS ON TO IMPROVE THE PHILIPPINE ECONOMY, **BY AREA, OCT 2021**

	<u>PH</u>	<u>NCR</u>	<u>BAL LUZ</u>	<u>VIS</u>	<u>MIN</u>
Providing jobs	80%	78%	83%	77%	77%
Controlling the prices of basic services and commodities	50	55	63	38	32
Reducing corruption in government	42	48	57	32	17
Developing health infrastructures	40	36	48	31	33
Developing educational infrastructures	33	31	40	31	24

OCTOBER 20-23, 2021

**ACTIONS THAT THE NEXT ADMINISTRATION SHOULD FOCUS ON TO
IMPROVE THE PHILIPPINE ECONOMY, *BY AGE GROUP*, OCT 2021**

	<u>PH</u>	<u>18-24</u>	<u>25-34</u>	<u>35-44</u>	<u>45-54</u>	<u>55+</u>
Providing jobs	80%	74%	81%	76%	83%	82%
Controlling the prices of basic services and commodities	50	45	53	46	53	49
Reducing corruption in government	42	43	40	39	45	42
Developing health infrastructures	40	46	39	36	39	40
Developing educational infrastructures	33	44	33	34	36	27

OCTOBER 20-23, 2021

TEST STATEMENT: "The growth of the Philippine economy will be accelerated if the government collaborates with the private sector," OCT 2021

	<u>Agree</u>	<u>Undecided</u>	<u>Disagree</u>	<u>Net*</u>
Philippines	82%	12%	6%	+75
NCR	80	12	8	+73
Balance Luzon	86	8	6	+80
Visayas	74	16	10	+63
Mindanao	81	15	4	+77
Urban	80	11	9	+72
Rural	83	12	5	+78
18-24	84	12	4	+80
25-34	82	14	5	+77
35-44	83	11	5	+78
45-54	84	8	9	+75
55 and above	79	13	8	+71
None/Up to some Elementary	79	18	4	+75
Elem grad/Some JHS	83	12	5	+77
JHS grad/Voc/some College	81	11	8	+73
College grad/Post graduate	84	10	5	+79

* Net figures (% Agree minus % Disagree), correctly rounded

OCTOBER 20-23, 2021



Leadership Characteristics and the Challenge of Accountability and Legitimacy



“

What the Filipinos are looking for is **competence, integrity, and performance** in the new presidency and government.

In Marcos Jr.'s case, he now has the opportunity to move away from the baggage of his past by **excelling in the foreign policy, socioeconomic, and governance realms**. He can make his own mark by adopting a multi-stakeholder approach to running the country.

Legitimation challenges

Philippine Daily Inquirer

16 May 2022

PRESIDENTIAL CANDIDATE WHO BEST FITS SELECTED CRITERIA

February 18 - 23, 2022 / Philippines
 (In Percent)

	Base: Likely Voters, 100%					
	MARCOS, BONGBONG (PFP)	ROBREDO, LENI (IND)	DOMAGOSO, ISKO MORENO (AKSYON)	PACQUIAO, MANNY PACMAN (PROMDI)	LACSON, PING (PDR)	UNAIDED Don't know/ Refused/ None
SELECTED CHARACTERISTICS						
The most honest and trustworthy	53	16	14	8	3	6
The greatest concern for the poor	47	15	16	18	2	3
The least corrupt	41	15	13	15	3	13
SELECTED ISSUES						
Has the clearest plan to address the country's problems	60	14	11	7	3	5
Will best defend the country against China	56	12	9	7	9	7

“Sama-sama tayong Babangon Muli”

- **Message of unity:** Unity is the first step to addressing problems brought about by the pandemic
- In order to revitalize the economy, Incoming President Marcos says that he plans to **move some public expenditure away from non-investment expenditures to more investment expenditures.**
- **Programs for the following sectors:**
 - Jobs! Jobs! Jobs! Economic Program
 - Agricultural and Food Security
 - Tourism
 - Infrastructure
 - Education
 - Healthcare
 - Industrialization and Energy
 - Socioeconomic Development
- **On Foreign Policy:** Consider what is best for the Philippines and how to achieve that, given existing partnerships, alliances, and how they will stand in a new world order.

Note: This list was compiled from his selected interviews, public appearances, and vlogs.



Selected Economic Policy Pronouncements (Post-Elections)

- Look into the **2023 national budget** to find sufficient funds for a **proposed stimulus measure** for the incoming administration's plans
- Move some public expenditure away from non-investment-led expenditures to **more investment-led expenditures to retool the economy**
- **Prefers “trade, not aid” from the US**; welcomes more **public-private partnerships (PPPs)** and **investments** from the US
- The Philippines to be involved in the **Indo-Pacific Economic Framework**
- **Improve the Philippine power sector** to boost industrialization post-pandemic
- **Revive the Bataan Nuclear Power Plant** to improve the country’s energy situation
- **Amend the Electric Power Industry Reform Act (EPIRA)** (RA 9136) to bring down the cost of electricity
- **Ensure the proper collection of taxes and duties** to fund government programs
- **Develop ports** to drive business growth in trade and shipping while increasing tax collection
- **Reduce the tax burden** for those suffering from the economic impact of the COVID-19 pandemic
- **Review the effects of the possible Regional Comprehensive Economic Partnership (RCEP) ratification** on the agriculture sector and the agriculture value chain
- Use new technology for **industrial farming**
- **Streamline government operations** through IT and digitalization

PROPOSED CABINET MEMBERS



Atty. Victor Rodriguez
Executive Secretary
*Spokesperson and Chief of Staff,
Incoming President Ferdinand Marcos, Jr.*



Incoming VP Sara Duterte
Department of Education (DepEd)
Mayor, Davao City



Jesus Crispin "Boying" Remulla
Department of Justice (DOJ)
*Representative, 7th District of Cavite
Former Governor, Cavite
Former Assistant Secretary, Presidential
Management Staff (1998)*



Atty. Bienvenido "Benny" Laguesma
Department of Labor and
Employment (DOLE)
Former Labor Secretary (1998-2001)



Susan "Toots" Ople
Department of Migrant Workers (DMW)
*Founder and President, Blas Ople Policy Center
Former DOLE Undersecretary (2004-2009)
Chief of Staff, Former Senator and DFA Secretary Blas Ople
(1992-2003)*



Atty. Benhur Abalos Jr.
Department of the Interior & Local Government (DILG)
*Former Chair, Metropolitan Manila Development Authority
(MMDA); Former Mayor, Mandaluyong City (2007-2016)*



Anton Lagdameo, Jr.
Special Assistant to the President (SAP)
*Former Representative, Davao del Norte 2nd
District (2007-2016)*



Atty. Trixie Cruz-Angeles
Presidential Communications & Operations Office (PCOO)
*Vice Chairman, National Committee of Monuments and Sites
Vlogger, Luminous; Host – Karambola program, DWIZ*

PROPOSED CABINET MEMBERS



Dr. Benjamin Diokno

Department of Finance (DOF)
Governor, Bangko Sentral ng Pilipinas (BSP)
Former Secretary, Department of Budget and Management (1998-2001, 2016-2019)



Alfredo E. Pascual

Department of Trade and Industry (DTI)
President, Management Association of the Philippines (MAP); Fellow and Trustee, Institute of Corporate Directors; Former President, University of the Philippines (2011-2017)



Amenah Pangandaman

Department of Budget and Management (DBM)
Assistant Governor, Bangko Sentral ng Pilipinas (BSP)
Chief of Staff, Outgoing BSP Governor Diokno



Arsenio Balisacan

National Economic & Development Authority
Incumbent Chairperson, Philippine Competition Commission; Former Dean, UP School of Economics Member-Academician, National Academy of Science and Technology; Former Director-General, NEDA (2012-2016)



Dr. Felipe Medalla

Bangko Sentral ng Pilipinas (BSP)
Member – Monetary Board, BSP
Former Dean, UP School of Economics

Selected Policy Pronouncements of the Marcos Jr. Economic Team

Benjamin Diokno (DOF)	Alfredo Pascual (DTI)	Arsenio Balisacan (NEDA)	Amenah Pangandaman (DBM)	Felipe Medalla (BSP)
<ul style="list-style-type: none"> • Emphasized the need for policy continuity • Retain most of the DOF undersecretaries and the National Treasurer • Prioritize debt management, which is the first item in his agenda • Improve tax administration and collection by reducing corruption through digitalization • Consider and look into the outgoing DOF's proposed Fiscal Consolidation and Resource Mobilization Plan • Further work on digitalization reforms 	<ul style="list-style-type: none"> • Prioritize the recovery of MSMEs by mobilizing support from the private sector, such as in the areas of financing and productivity enhancement • Temporarily waive the requirements for registration of small businesses • Make business registration easier through the digitalization of government services • Attracting more local and foreign investors to generate more jobs • Inject more technology to create greater value added in industries 	<ul style="list-style-type: none"> • Prioritize steering the economy to its pre-pandemic trajectory and reducing poverty and socioeconomic inequality • Reinvigorate, reexamine, and bring back public-private partnerships • Revive the country's manufacturing sector to generate productive jobs • Vigorously enforce the competition policy to remove barriers to entry • Address the ongoing education crisis, which would hinder productivity in the future • Improve the ease of doing business in the country 	<p>Prioritize the 2023 National Expenditure Program (NEP):</p> <ul style="list-style-type: none"> • agricultural and food security • climate change adaptation • economic recovery • improved healthcare and education • enhanced infrastructure projects including digital infrastructure • utilization of renewable energy sources • strengthened tourism and jobs creation • sustainable development 	<ul style="list-style-type: none"> • Focus on the BSP's three pillars: price stability, financial stability, and efficient payments and settlements system • Modernize the farming sector and provide assistance to farmers • Sees no reason to rush raising interest rates

PROPOSED CABINET MEMBERS



Atty. Ivan John Enrile Uy

Department of Information & Communications
Technology (DICT)

*Former Chairman, Commission on Information of
Communications and Technology
Corporate Secretary, Philippine Chamber of Commerce
and Industry*



Manuel "Manny" Bonoan

Department of Public Works & Highways (DPWH)

*President and CEO, SMC Tollways
Former Undersecretary, DPWH*



Maria Zenaida Angping

Presidential Management Staff (PMS)

Former Representative, Manila 3rd District



Christina Frasco

Department of Tourism (DOT)

*Spokesperson, Incoming VP Sara Duterte
Mayor, Municipality of Liloan, Cebu*



Erwin Tulfo

Department of Social Welfare and
Development (DSWD)

Broadcaster, People's Television Network



Clarita Carlos

National Security Adviser

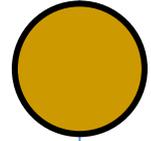
*Director-General, National Security Council (NSC)
Former President, National Defense College of the
Philippines*



Conrado Estrella III

Department of Agrarian Reform (DAR)

*Former President, National Defense College of the
Philippines*



19th Congress of the Philippines



SENATE

Seatmates



Zubiri



Angara



Villanueva



Poe



Ejercito



Binay



Gatchalian

DDS Group



Go



Dela Rosa



Tolentino



Padilla

Senior NPC



Escudero



Legarda

Nacionalista Party



Marcos



Villar, C.



Villar, M.

Minority



Hontiveros



Pimentel

Cayetano Siblings



Cayetano, A.



Cayetano, P.

Independents



Tulfo



Lapid



Revilla



Estrada

Initial Senate Chairmanship Assignments?



**MIGZ
ZUBIRI**

Senate
President



**LOREN
LEGARDA**

SP Pro Tempore
Higher Education



**JOEL
VILLANUEVA**

Majority Floor
Leader



**SONNY
ANGARA**

Finance
Youth



**GRACE
POE**

Public Services
Economic Affairs



**SHERWIN
GATCHALIAN**

Ways and Means
Basic Education



**RAFFY
TULFO**

Energy
OFWs



**BONG
GO**

Health
Sports



CYNTHIA VILLAR

Environment,
Natural Resources & Climate
Change

Agriculture, Food &
Agrarian Reform



**MARK
VILLAR**

Trade, Commerce
and
Entrepreneurship



**FRANCIS
TOLENTINO**

Blue Ribbon
Science & Technology



**JINGGOY
ESTRADA**

National Defense
Labor



ROBIN PADILLA

Constitutional
Amendments and
Revision of Codes
Public Information

Initial Senate Chairmanship Assignments?



**CHIZ
ESCUDERO**

Justice*



NANCY BINAY

Tourism

Accounts



LITO LAPID

Games and
Amusement



**BONG
REVILLA**

Public Works

Civil Service



**KOKO
PIMENTEL**

Minority Floor
Leader



PIA CAYETANO

Sustainable
Development
Goals



JV EJERCITO

Local Government

Urban Planning,
Housing & Resettlement



IMEE MARCOS

Foreign Relations

Social Justice

Cooperatives



**BATO DELA
ROSA**

Public Order &
Dangerous Drugs



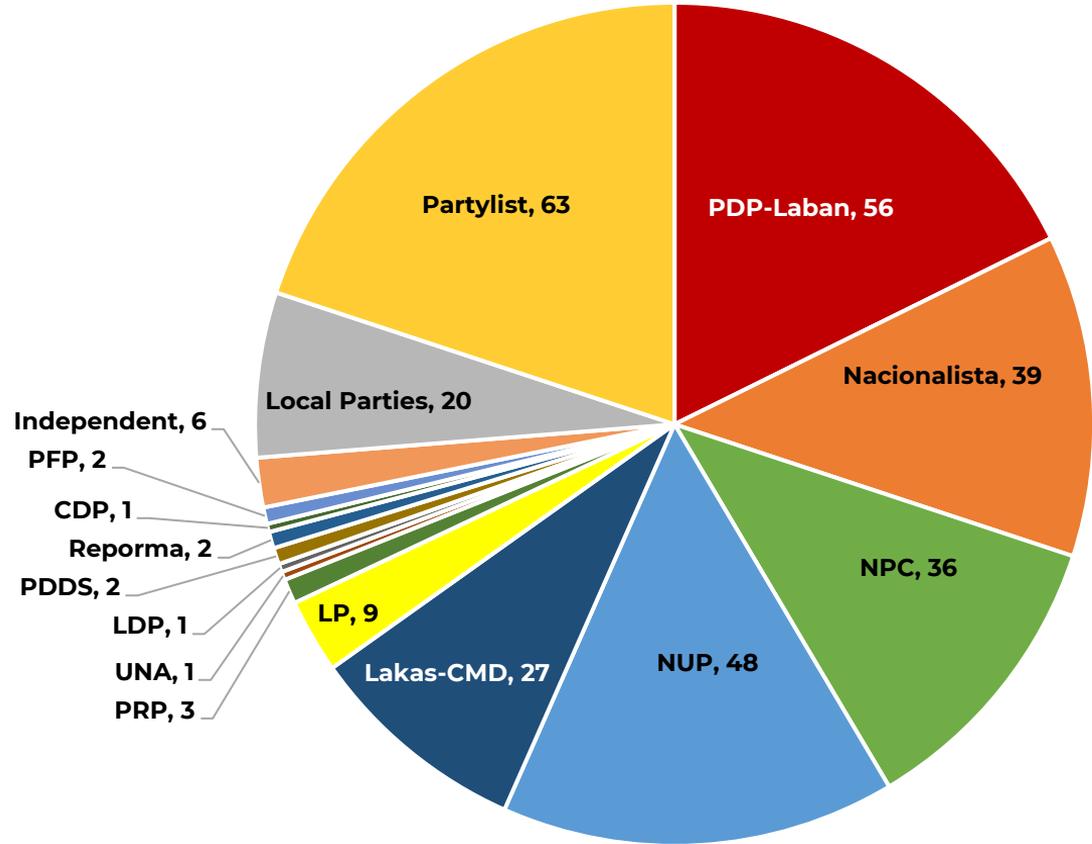
**RISA
HONTIVEROS**

Women

HOUSE OF REPRESENTATIVES

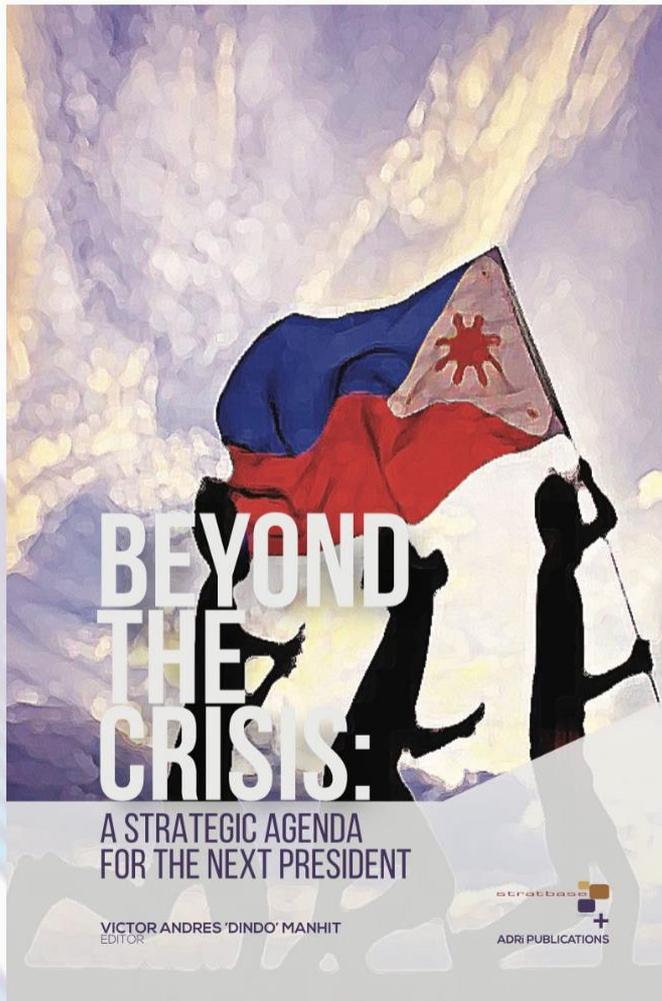
Martin Romualdez
Speaker of the House

?
Majority Floor Leader



“The new administration will need a forward-looking governance outlook with a multifaceted approach toward effectively leading, managing, and empowering society without sacrificing any sector. It should be a three-pronged governance anchored on the collaboration of government, private sector, and civil society, and one that is people-centered, sustainable, and globally competitive.”

Let's not squander another six years
Philippine Daily Inquirer, 1 January 2022



BEYOND THE CRISIS:

A STRATEGIC AGENDA FOR THE NEXT PRESIDENT

An enabling and stable environment should be laid down for the private and non-government sectors. The past administration's whimsical and arbitrary decisions and pronouncements created the culture of animosity between government, the private sector, and civil society. The initiatives of the private sector and civil society in alleviating the crisis and reinvigorating the economy were downplayed.

Without this, the private sector could have accomplished greater deeds. If it were only seen as a valuable partner by the government, it could have done more to uplift the economic and social lives of the people.

With the new political set-up, **a three-way trusting relationship between government, the private sector, and civil society will be essential in the promotion of business operations, social relations, and national recovery and development efforts.**

The new administration will need all the help it can get just to get by until the end of this year and in the years that will follow.

It needs to **pursue and attract more investments in the country to create jobs and livelihood opportunities, provide income, enhance productivity,** and benefit the future generations.

With all the external pressures brought upon by the war between Russia and Ukraine, the tightening supply of oil, and the fiscal pressures around the world as a result of the pandemic, among others, **the next six years will be crucial for all Filipinos and our country's recovery.** All sectors of society should keep our eye on the ball, **hold our new set of leaders accountable for their decisions,** and refuse to get distracted from our all-encompassing objective.

Moving forward from a divisive election contest, a government that has a balanced and stable policy environment that aligns with public demand and social clamor will build the confidence and trust needed to push on and compete in what will hopefully be a post-pandemic economic swing to a prosperous and sustainable economic trajectory.

At the end of the day, governing beyond the crisis entails a new leadership that thinks and acts beyond politics.

Governance beyond the crisis
Philippine Daily Inquirer, 27 May 2022

Thank You!