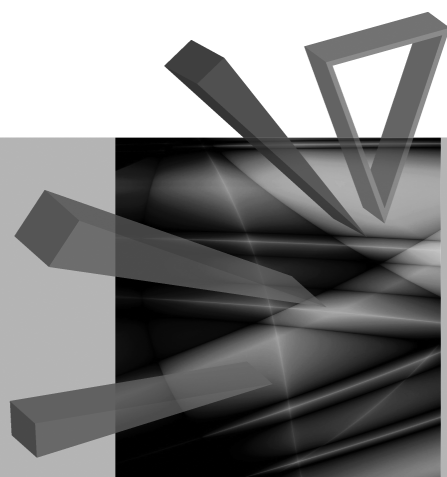


# Faces of Competitiveness in Asia Pacific



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## REMARKS ON INTERNATIONAL COMPETITIVENESS OF ASEAN ECONOMIES

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**Summary:** The ten countries forming ASEAN account for approximately 5% of world GDP and 8% of world population. They were perceived in the 80s and 90s as a miracle region. The Asian crisis stopped dynamism of the region's development for a moment, but in fact it did not take too long to come back to the path of growth by those countries. Anyway the situation has changed a lot as two giant economies – China and India – have started to emerge in the neighbourhood. It has caused the Southeast Asian miracle to fade. The article, based mainly on the latest WEF *Global Competitiveness Report*, shows positive and negative elements in the international competitive position of ASEAN economies. The analysis shows evidently that each country must develop its own individual competitiveness strategy that is tailored to each country's conditions.

**Keywords:** international competitiveness, ASEAN, labour productivity.

As there is not one widely accepted definition of international competitiveness, the term international competitiveness is interpreted in various ways. According to the definition of OECD, international competitiveness means the ability of firms, industries, regions, countries or supranational groupings to achieve the possibly highest profits from participation in international division of labour. One can distinguish international competitiveness on micro-, mezzo-, macro- and megaeconomic levels adequately then. The research on competitiveness has been taking different directions in economy. The main ones are based on:

- trade theory,
- growth theory,
- microeconomy.

There are two concepts of macrocompetitiveness: one is based on the role of quality and specifics of institutional environment (it could be called institutional), and the other stresses the role of innovation as the basic source of competitiveness. The most frequent approach treats competitiveness as “the ability of producers to sell goods in foreign markets at price, quality, and timeliness comparable to competing foreign producers”.<sup>1</sup> It focuses mainly on trade. It can be also stated that international

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<sup>1</sup> *Sub-Saharan Africa: Effects of Infrastructure Conditions on Export Competitiveness, Third Annual Report*, United States International Trade Commission (USITC), Investigation No. 332-477, US-

competitiveness is the ability and motivation of a certain economy for economic development in the long run in the conditions of open economy.<sup>2</sup>

This article is focused on this wider meaning of competitiveness and factors influencing it, not limiting it only to trade. In the contemporary world economy, it is not only trade that builds a country's competitiveness, though many studies typically concentrate only on the role of trade. Traditionally, we used to perceive a country as a competitive one in a situation when its products easily dominated international markets. In the contemporary world, when production chains link different countries, it is neither trade nor exports itself that builds competitiveness of a country. The most important factor is foreign direct investment (FDI) with its role of advancing a country's performance and competitiveness of its companies. For some time already it is FDI that has been delivering goods and services to foreign markets. Beyond that, FDI has been integrating the production systems of countries.

The European Commission (EC) mentioned international industry competitiveness, defining it as the position of an industry relative to its foreign rivals in terms of market shares, volume of trade, and relative cost, particularly in regard to labour productivity and the relative cost of labour.<sup>3</sup> World Economic Forum defines international competitiveness as "the set of institutions, policies, and factors that determine the level of productivity of a country", which sets a country's "sustainable level of prosperity".<sup>4</sup> The article will touch only some selected problems of the extremely vast field of research on this subject.

The ten countries forming a grouping of ASEAN account for approximately 5% of world GDP and 8% of world population. The Southeast Asian countries were perceived in the 80s and 90s as a miracle region. The Asian crisis stopped dynamism of the region's development for a moment, but in fact it did not take too long to come back to the path of growth by those countries. Anyway, the situation has changed a lot meanwhile – two giant economies, China and India, have started to emerge in the neighbourhood astonishing the world with the progress they achieved. Especially Chinese development and growing competitiveness on the world market on the one hand, and as an attractive location for FDI on the other, have caused that Southeast Asian miracle has faded. The new age and new problems in the globalizing world should somehow awake businesses and politicians in ASEAN countries to concentrate more on the competitiveness of the countries.

According to Global Competitiveness Report (GCR), the ASEAN economies are at different stages of competitiveness (see Table 1). Only one economy is at the highest stage – it is of course Singapore. Two economies can be found at the 2nd

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ITC Publication 4071, April 2009, pp. 1-2, <http://www.usitc.gov/publications/332/pub4071.pdf> (date of access: 12.04.2011).

<sup>2</sup> OECD database and definitions, <http://stats.oecd.org>.

<sup>3</sup> See *European Competitiveness*, EC, Enterprise and Industry Directorate-General.

<sup>4</sup> *The Global Competitiveness Report 2010-2011*, World Economic Forum, Geneva 2010, p. 4.

stage, in fact, nearly entering the stage of transition from 2 to 3 – these are Malaysia and Thailand. Both of the economies need to introduce innovation more widely. They urgently need to improve adoption of new technologies, which would in effect cause improvement in productivity and innovation potential.

**Table 1.** Stages of the ASEAN economies' competitiveness according to Global Competitiveness Report\*

Stage 1 Factor driven development	Transition from 1 to 2	Stage 2 Efficiency driven development	Transition from 2 to 3	Stage 3 Innovation driven development
Cambodia, The Philippines, Vietnam	Brunei, Indonesia	Malaysia, Thailand	–	Singapore

\* Lao PDR and Myanmar are missing in the GCR.

Source: *The Global Competitiveness Report 2010-2011*, World Economic Forum, Geneva 2010.

ASEAN consists of ten extremely diverse countries in terms of political systems, history, culture, religion, language, number of population, level of prosperity, and international competitiveness as well. ASEAN economies take extremely diverse positions in the ranking measuring competitiveness of 139 countries (see Table 2).

**Table 2.** Global Competitiveness Index 2010-2011 rankings and 2009-2010 comparisons

Country	2010-2011	2009-2010
Singapore	3	3
Malaysia	26	24
Brunei	28	32
Thailand	38	36
Indonesia	44	54
Vietnam	59	75
The Philippines	85	87
Cambodia	109	110

Source: *The Global Competitiveness Report 2010-2011*, World Economic Forum, Geneva 2010, p.15.

Let us make some observations on the main factors influencing ASEAN economies' competitiveness. One could easily come to the conclusion about their different situations and approach to the problem of competitiveness.

**Singapore** is one of the leading economies as far as competitiveness is concerned. It has kept its 3rd position for the second time last year. In GCR 2008-2009 it was ranked as the 5th one. It is typically an innovation-driven economy, although it is not



without weaker points. Singapore's market size is one of them, it is a consequence of its small population (about 4.7 million). Some macroeconomic problems also cause its lower rank in the case of macroeconomic environment. Inflation seems to be its greatest problem together with restrictive labour regulations and not always properly educated workforce. But its labour market efficiency as well as goods market efficiency are much above the average for other economies at this stage. It is the same with financial market development.

**Malaysia** belongs to the group of countries that have reached efficiency-driven stage of development. It has dropped two places in the latest report, which is the consequence of poor quality of its institutions (although this index has lately come to a halt after four-year consequent drop to the 43rd position). This low position is the consequence of its security situation. Malaysia has poor scores as far as education is concerned, especially at secondary and tertiary levels. It should also, as already mentioned, improve the use of greater technological adoption, especially ICT technologies in order to enhance productivity. On the other hand, Malaysia has such strong points as:<sup>5</sup>

- a well-developed financial market,
- an efficient goods market,
- business sophistication,
- innovation.

**Thailand** has experienced quite a significant drop in its competitiveness since 2006. Its position on the ranking list in 2010 was 38th, comparing with its 28th rank in 2006. This is due to the fact that Thailand's institutions are extremely poor. This deterioration in the competitive position is connected with problems of social unrest and political instability in Thailand. As far as strong points of the country are concerned, it should be mentioned that Thailand has:

- relatively large domestic as well as export markets,
- a relatively well functioning goods market,
- excellent transport infrastructure,
- high efficiency of its labour market,
- relatively sophisticated business environment with well developed clusters,
- companies operating across the value chain.

Thailand needs to improve, apart from the aforementioned adoption of new technologies, its institutional framework, as well as education and health systems.

**Indonesia** did an impressive progress in 2010 as far as the global competitiveness index is concerned, increasing its position by 10 places compared to the previous year. This is mainly thanks to a better macroeconomic environment and improvement in education sector. Indonesia has done much effort to improve its education, which is impressive given its population (over 237 million). This success is still more precious, as the crisis period in the world economy was not making the task easier.

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<sup>5</sup> *Ibidem*, pp. 29-30.

Indonesia has kept its deficit under control. With public debt staying low (31% of GDP), its savings rose to 33% of GDP.<sup>6</sup> The weak points of this country are:

- infrastructure, especially ports, roads and electricity supply,
- health situation (tuberculosis and malaria incidence, infant mortality rate – among the highest in the world),
- low technological readiness (ICT used – one of the lowest in the world, ranked 103).

**Brunei Darussalam** with its small population (0.4 million) and very high GDP *per capita* (26,325 USD) has reached the stage of transition from 1 to 2. Its high GDP *per capita* allows the country to be successful in such areas as primary education and health. Brunei has been also successful in macroeconomic environment, which is surely connected with increasing incomes from oil exporting. It exceeds almost all the average parameters for the countries at this stage. Only business sophistication, goods market efficiency, and innovation are its weaker points.

Another member of ASEAN that is worth mentioning is **Vietnam**. This factor-driven economy increased its position by 16 points in the global competitiveness index, improving almost all the pillars of it. Vietnam's competitive strengths are:<sup>7</sup>

- its efficient labour market;
- its innovation potential, especially when one compares it with the country's distant position as far as development is concerned;
- its large market size (about 90 million of inhabitants);
- particularly large export market;
- improved macroeconomic situation in spite of the crisis in the world economy and internal problems.

As to Vietnam's weaknesses of competitiveness, it should be mentioned that the economy may be characterized by the following features:

- very high trade barriers – average import tariffs are equal to 8.2% of traded goods value, many other barriers are applied there, customs procedures are very long and burdensome;
- high inflation;
- a decrease of the dong;
- very frequent interest rate changes (ups and downs);
- one of the highest government budget deficits in the world contributing to high public debt;
- too low access to financing,
- underdeveloped infrastructure with low quality of roads, ports etc.;
- the quality of higher education and training, although it has been improving lately;
- still improper property rights protection.

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<sup>6</sup> *Ibidem*, p. 29.

<sup>7</sup> *Ibidem*, p. 30.

**The Philippines** are the factor-driven economy. They have relatively well educated society and big market. Their financial system is pretty sound thanks to the lessons learned during the Asian crisis. Its main problems are:

- corruption,
- inefficient government bureaucracy,
- poor infrastructure,
- policy instability,
- relatively low technological readiness.

**Cambodia** ranked 109 in the last report covering 139 countries. Its competitiveness is very low. It is retarded in almost all the fields. The only brighter points in the case of Cambodia are health and primary education, as well as labour market efficiency that are above the average for the group.

Two other ASEAN countries: **Lao PDR** and **Myanmar** are among the least developed economies in the world. Their economies are still mainly based on agriculture. The growing role of supply chains and international networks in Asia has been creating possibilities for those countries as well as Vietnam and Cambodia, to enhance the agricultural sector's competitiveness.<sup>8</sup>

The diversity of ASEAN countries causes that, as shown earlier, very different effectiveness of various competitiveness drivers – such as education, government regulations etc. – can be found in each of the ASEAN countries. The analysis of ASEAN economies' competitiveness drivers shows evidently that each country must develop its own individual competitiveness strategy that is tailored to each country's particular conditions. The strategy cannot be copied from others. Anyway in each country there is a role for business sector to drive competitiveness, although it cannot happen without a support of sound government policies.

Table 3 shows still more differences in the ASEAN economies. These differences must be taken into consideration while thinking about competitiveness strategies in individual economies. One can easily observe how different the structure of ASEAN economies is.

Productivity of labour is one of core issues while discussing competitiveness of individual economies. Table 4 allows us to compare labour productivity growth of ASEAN economies with some other selected economies: the USA, the EU, and China. One can observe that the progress in ASEAN, especially comparing to China, in this sphere was not imposing.

The data shown in Table 5 concern a longer period – since the beginning of the 70s. They indicate that labour productivity growth increased systematically, but slowly during the past decades in all the sectors of economy in all the ASEAN countries shown in the table, apart from two cases: the Philippine services in the three last decades of the twentieth century and Cambodian services in 2000-2006.

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<sup>8</sup> L.C.Y. Wong, The role of supply chains and international networks in enhancing the agricultural sector's competitiveness in Cambodia, Laos, Myanmar and Vietnam (CLMV), *Asian Journal of Agriculture and Development* 2007, Vol. 4, Issue 1, pp. 1-10.

**Table 3.** Sectoral value-added as a share (%) of GDP

Country	Agriculture	Manufacturing industry	Non-manufacturing industry	Services
Brunei Darussalam	1	10	61	28
Cambodia	35	16	8	41
Indonesia	15	28	20	37
Malaysia	10	28	20	42
Philippines	16	22	9	53
Singapore	0	21	7	72
Thailand	12	35	9	44
Vietnam	22	21	19	38

Source: *The Global Competitiveness Report 2010-2011*, World Economic Forum, Geneva 2010, p. 63.

**Table 4.** Cross-country comparison of labour productivity growth: Average annual growth rate (GDP at constant basic prices per worker using 2005 PPPs)

Country	1990-1995	1995-2000	2000-2005	2005-2007
Brunei	-1.3	-1.7	-0.5	-1.7
Indonesia	6.5	-1.5	3.8	2.7
Philippines	-0.4	2.4	1.1	5.0
Myanmar	3.5	5.8	10.2	6.9
Malaysia	6.4	0.9	3.1	3.5
Thailand	8.3	0.1	2.6	3.6
Singapore	5.2	1.9	3.7	2.6
Vietnam	5.6	4.1	4.8	6.1
Lao PDR	3.4	3.6	4.0	4.7
Cambodia	4.2	3.5	3.5	6.3
ASEAN	5.4	0.5	3.1	3.9
USA	1.5	2.2	2.1	1.1
EU 15	1.8	1.3	0.8	1.2
China	10.6	7.1	8.1	10.3

Unit: Percentage.

Note: The annual average growth rate for Cambodia during 1990-1995 is its annual average growth over 1993-1995 because of the lack of final demand.

Source: *APO Asian Productivity Databook 2010*, Keio University Press, Tokyo 2010, p. 61.

**Table 5.** Average annual labour productivity growth by sector (in %)

	Agriculture		Manufacturing		Services	
	1971-1999	2000-2006	1971-1999	2000-2006	1971-1999	2000-2006
Cambodia	2.2	3.1	1.2	0.9	1.8	-1.2
Indonesia	2.1	2.5	6.3	4.7	0.9	5.1
Malaysia	2.0	4.5	4.5	6.3	5.3	2.4
Philippines	0.5	2.9	1.2	3.4	-0.6	3.1
Singapore	4.7	2.5	4.6	3.5	4.0	2.5
Thailand	4.3	3.3	3.7	1.9	0.9	1.3
Vietnam	2.7	4.0	7.1	2.5	2.4	1.4

Note: The initial observation period is 1971 except for the following countries (with the initial observation year in parentheses): Cambodia (1994), Indonesia (1977), Malaysia (1988), Vietnam (1991).

Source: *APO Asian Productivity Databook 2009*, Keio University Press, Tokyo 2009; after W. Thorbecke, M. Lamberte, G. Komoto, *Promoting Learning and Industrial Upgrading in ASEAN Countries*, ADBI Working Paper Series No. 250, September 2010, p.16.

Analyzing the data concerning each of the three sectors, we can easily come to a conclusion that the labour productivity growth of service sector seems to be a weak point in the majority of ASEAN economies. The only country that showed dynamism as far as this index is concerned is Indonesia with 5.1% growth in the period 2000-2006, but it could be a consequence of extremely low growth in the previous period (0.9%).

The data in Table 4 and 5 show that the ASEAN countries have not achieved much as far as labour productivity is concerned. It is the consequence of their concentration (with a few exceptions) on labour-intensive goods. It is very important for those countries to graduate to higher-skilled works to add more value to their production. It is also very important for them to increase productivity in service sector. It should be one of priorities for those countries.

While analyzing international competitiveness, one should mention such topics as Asian division of labour, triangle manufacturing, Asian economic integration, and many others, which have important influence upon increasing competitiveness of ASEAN region. Unfortunately, there is no place for a detailed consideration in the article, so let us leave them for further discussions.

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## UWAGI NA TEMAT MIĘDZYNARODOWEJ KONKURENCYJNOŚCI GOSPODAREK ASEAN

**Streszczenie:** Na dziesięć krajów tworzących ugrupowanie ASEAN przypada około 5% światowego PKB i 8% światowej populacji. W latach 80. i 90. kraje Azji Południowo-Wschodniej postrzegane były jako region „cudu gospodarczego”. Kryzys azjatycki zatrzymał dynamiczny rozwój tych gospodarek na chwilę, by w krótkim czasie ponownie wróciły na ścieżkę wzrostu, jednak dzisiaj dynamizm ASEAN został przyćmiony szybkim rozwojem gospodarek Chin i Indii. Artykuł, oparty w dużej części na *Global Competitiveness Report* publikowanym przez WEF, pokazuje pozytywne i negatywne czynniki wpływające na międzynarodową konkurencyjność gospodarek regionu. Analiza tych czynników pokazuje, że każdy z tych krajów musi wypracować własną „skrojoną na miarę”, dostosowaną do indywidualnych warunków w każdym z tych krajów strategię konkurencyjności.