



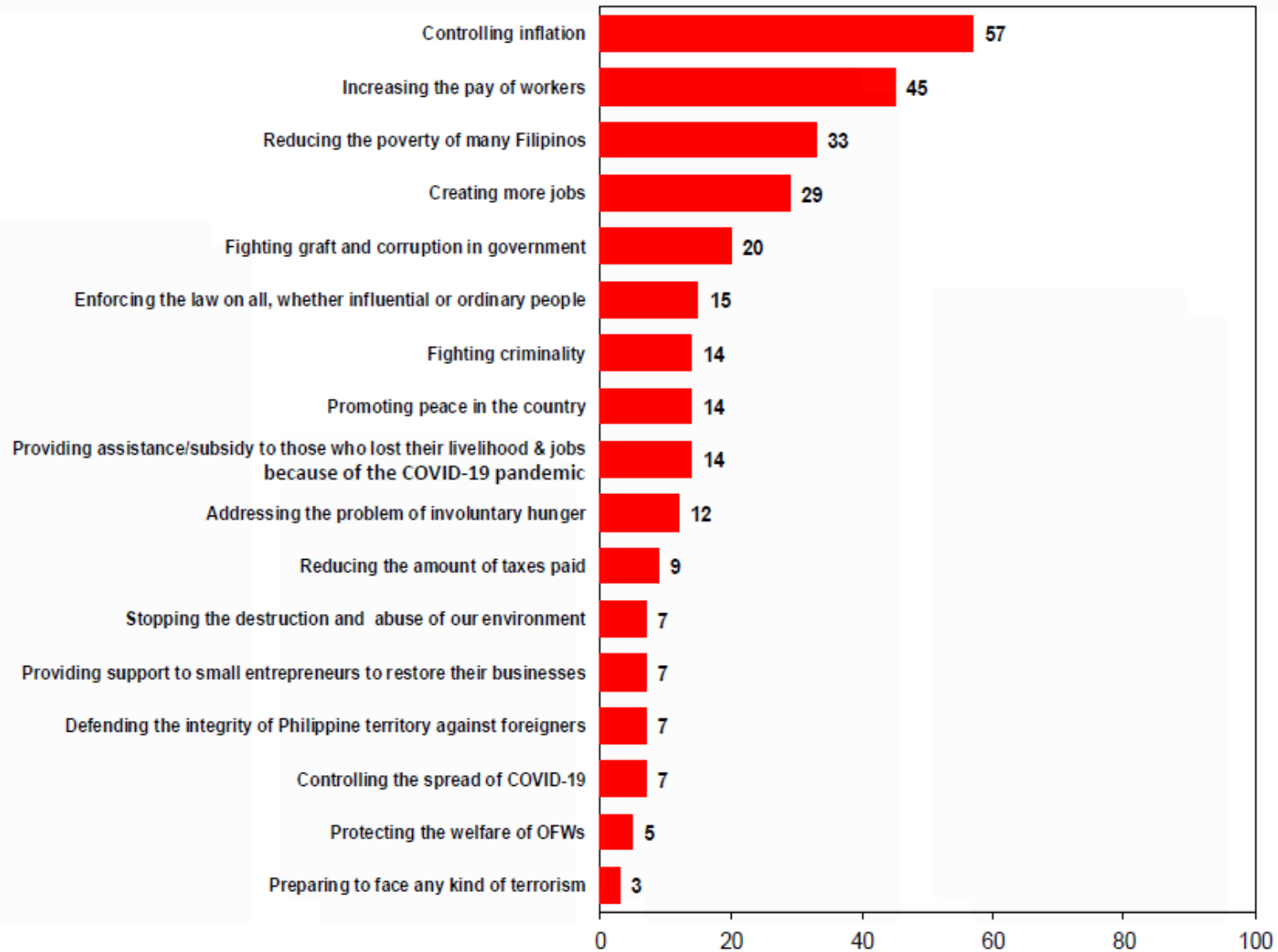
A Government Agenda for Development in the Marcos Jr. Presidency Post-Pandemic

**A POST-SONA ANALYSIS
28 JULY 2022 | 9:00 AM - 11:00 AM PHT | VIA ZOOM**

MOST URGENT NATIONAL CONCERNS

June 24 - 27, 2022 / Philippines

(In Percent / Multiple Response Allowed)



MOST URGENT NATIONAL CONCERNS: OVERALL

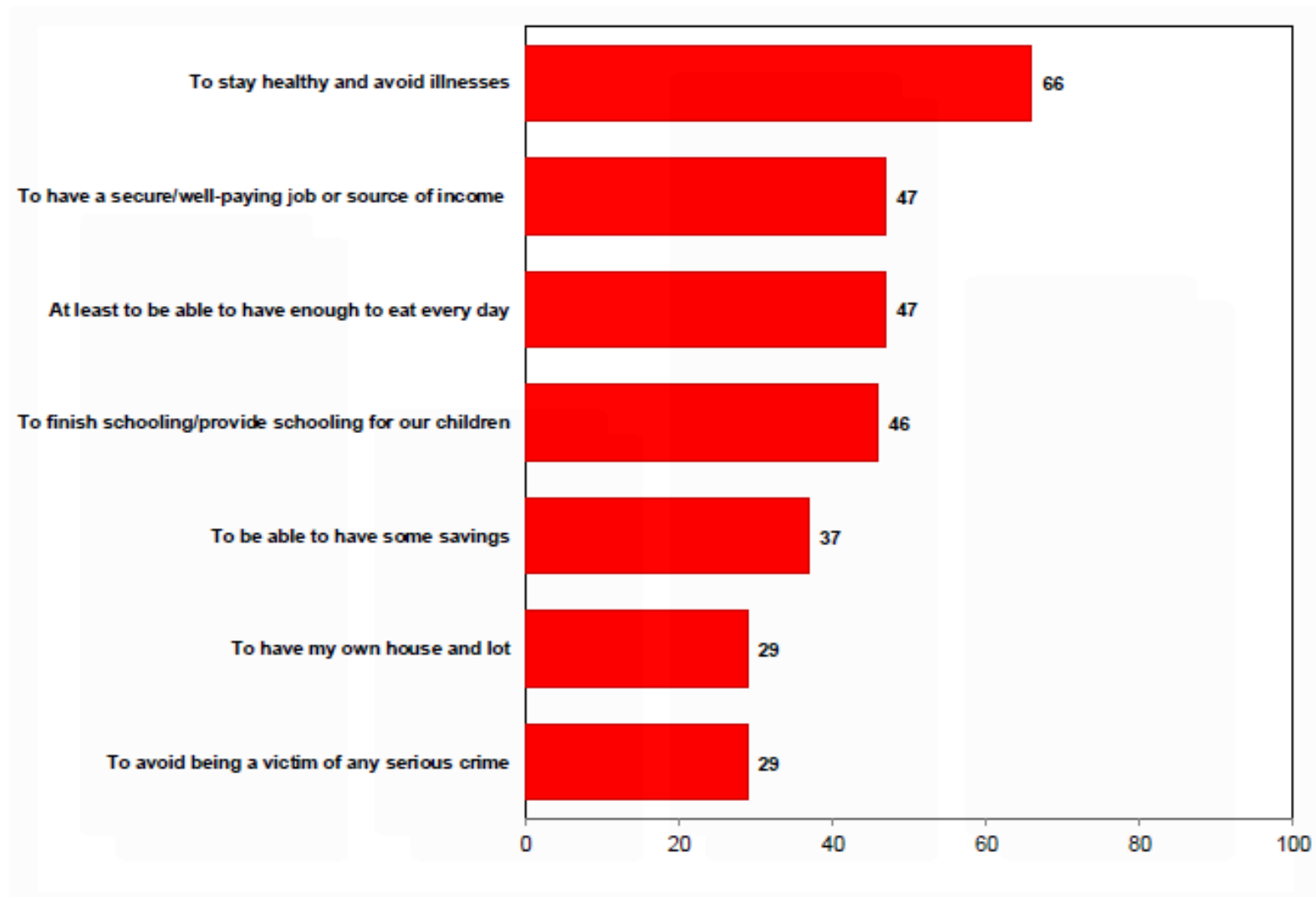
June 24 - 27, 2022 / Philippines

(In Percent / Multiple Response, up to 3 allowed)

Base: Total Interviews, 100%								
NATIONAL CONCERNS	RP	LOCATION				CLASS		
		NCR	BL	VIS	MIN	ABC	D	E
Controlling Inflation	57	67	46	62	69	48	58	62
Increasing the pay of workers	45	47	43	52	43	43	46	46
Reducing the poverty of many Fillplnos	33	30	34	26	41	31	34	35
Creating more jobs	29	31	32	26	23	19	30	29
Fighting graft and corruption in government	20	23	22	22	15	29	20	15
Enforcing the law on all, whether influential or ordinary people	15	11	17	18	13	22	15	11
Fighting criminality	14	12	14	17	15	10	15	14
Promoting peace in the country	14	12	17	13	10	24	13	9
Providing assistance / subsidy to those who lost their livelihood and jobs because of the COVID-19 pandemic	14	13	12	18	14	5	15	13
Addressing the problem of involuntary hunger	12	11	10	17	14	6	12	22
Reducing the amount of taxes paid	9	8	13	2	5	12	8	10
Stopping the destruction and abuse of our environment	7	10	9	5	5	7	6	16
Providing support to small entrepreneurs to restore their businesses	7	8	8	6	7	15	7	4
Defending the integrity of Philippine territory against foreigners	7	5	10	4	6	16	6	4
Controlling the spread of COVID-19	7	7	9	4	5	6	7	5
Protecting the welfare of OFWs	5	3	3	4	10	2	5	3
Preparing to face any kind of terrorism	3	3	3	4	4	3	4	2

MOST URGENT PERSONAL CONCERNS

June 24 - 27, 2022 / Philippines
(Multiple Response Allowed / In Percent)



MOST URGENT PERSONAL CONCERNS: OVERALL

June 24 - 27, 2022 / Philippines

(In Percent / Multiple Response, up to 3 allowed)

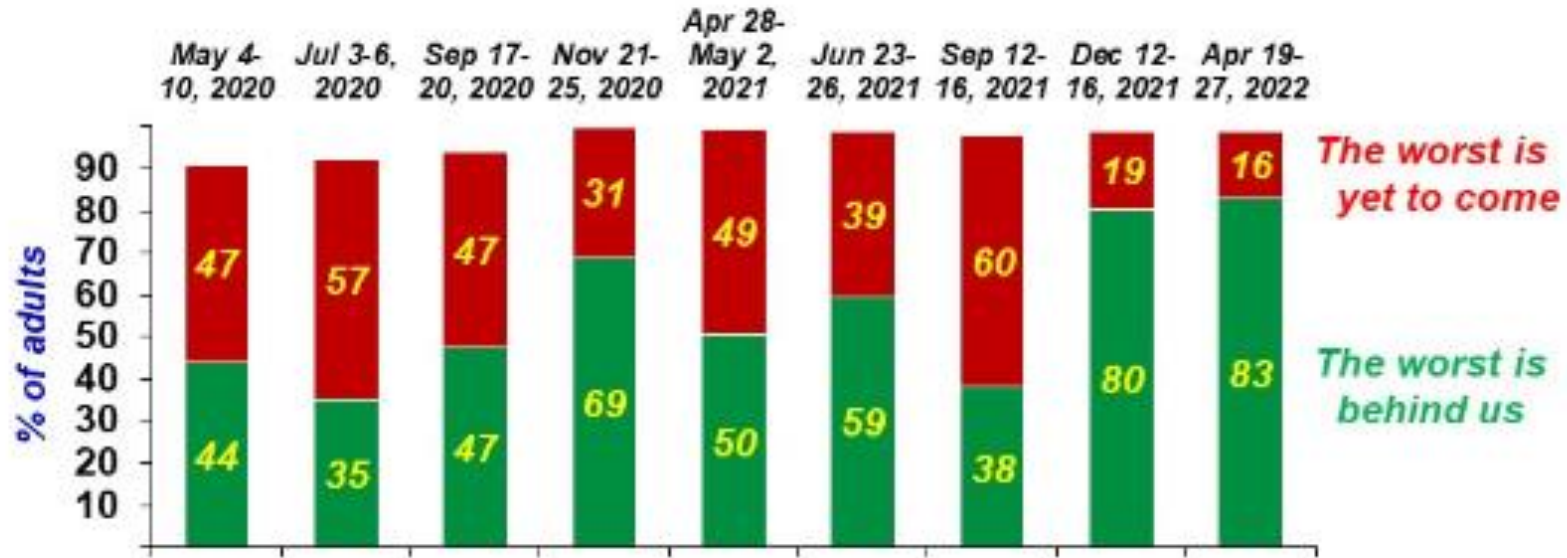
Base: Total Interviews, 100%								
PERSONAL CONCERNS	RP	LOCATION				CLASS		
		NCR	BL	VIS	MIN	ABC	D	E
To stay healthy and avoid illnesses	66	72	66	70	58	88	63	58
To have a secure and well-paying job or source of income	47	48	47	41	52	28	52	43
At least to be able to have enough to eat every day	47	40	49	49	46	51	44	59
To finish schooling or to be able to provide schooling for our children	46	43	48	51	41	41	46	55
To be able to have some savings	37	36	35	35	43	34	39	26
To have my own house and lot	29	30	26	31	31	29	29	28
To avoid being a victim of any serious crime	29	32	29	24	28	30	28	32

COMPARATIVE RATINGS OF THE NATIONAL ADMINISTRATION ON SELECTED NATIONAL ISSUES

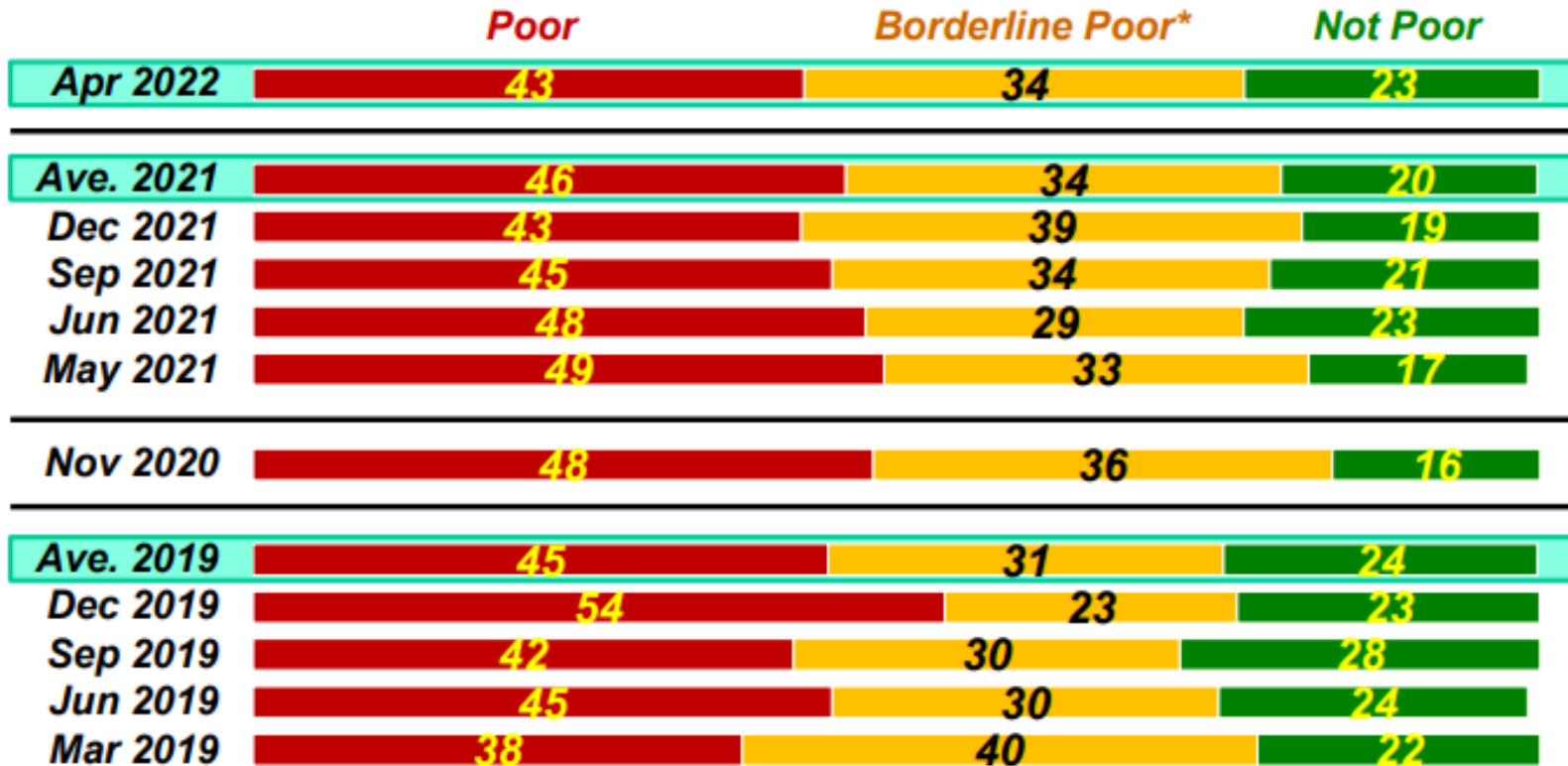
March and June 2022 / Philippines
(In Percent)

Selected National Issues	Approval		Change*	Undecided		Change*	Disapproval		Change*
	Mar 22 (A)	Jun 22 (B)	Jun22 - Mar22 (B - A)	Mar 22 (C)	Jun 22 (D)	Jun22 - Mar22 (D - C)	Mar 22 (E)	Jun 22 (F)	Jun22 - Mar22 (F - E)
Fighting graft and corruption in government	51	61	+10	27	25	- 2	22	15	- 7
Stopping the destruction and abuse of our environment	54	59	+ 5	32	27	- 5	14	14	0
Increasing the pay of workers	45	56	+11	30	26	- 4	25	17	- 8
Creating more jobs	44	52	+ 8	36	32	- 4	21	16	- 5
Defending the integrity of Philippine territory against foreigners	48	51	+ 3	32	32	0	20	17	- 3
Reducing the poverty of many Filipinos	36	37	+ 1	32	31	- 1	32	32	0
Controlling inflation	28	30	+ 2	28	26	- 2	44	44	0

**OPINION ON WHETHER THE WORST IS BEHIND US
OR THE WORST IS YET TO COME REGARDING
THE COVID-19 CRISIS: *PHILIPPINES*, MAY 2020 TO APR 2022**



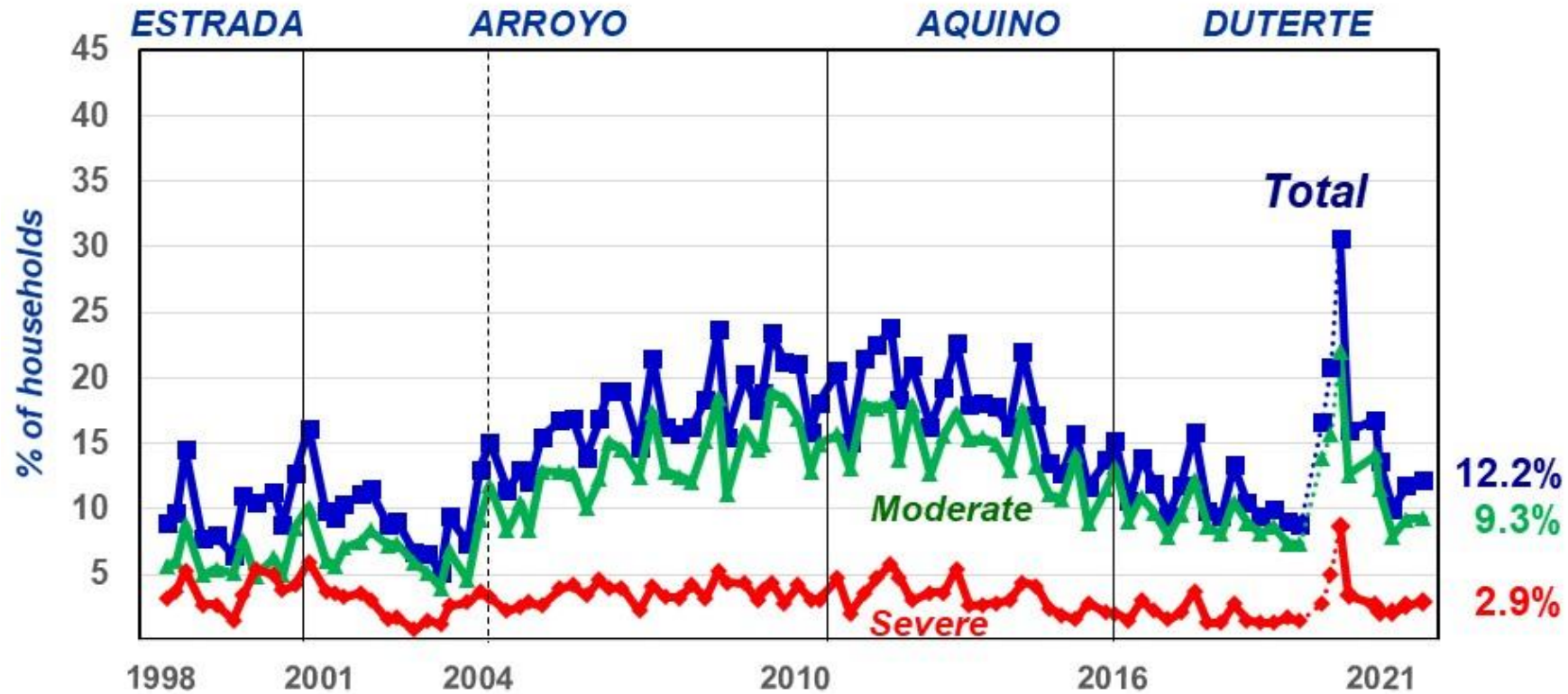
SELF-RATED POVERTY: FAMILIES WHO ARE “MAHIRAP”: PHILIPPINES, MAR 2019 TO APR 2022



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



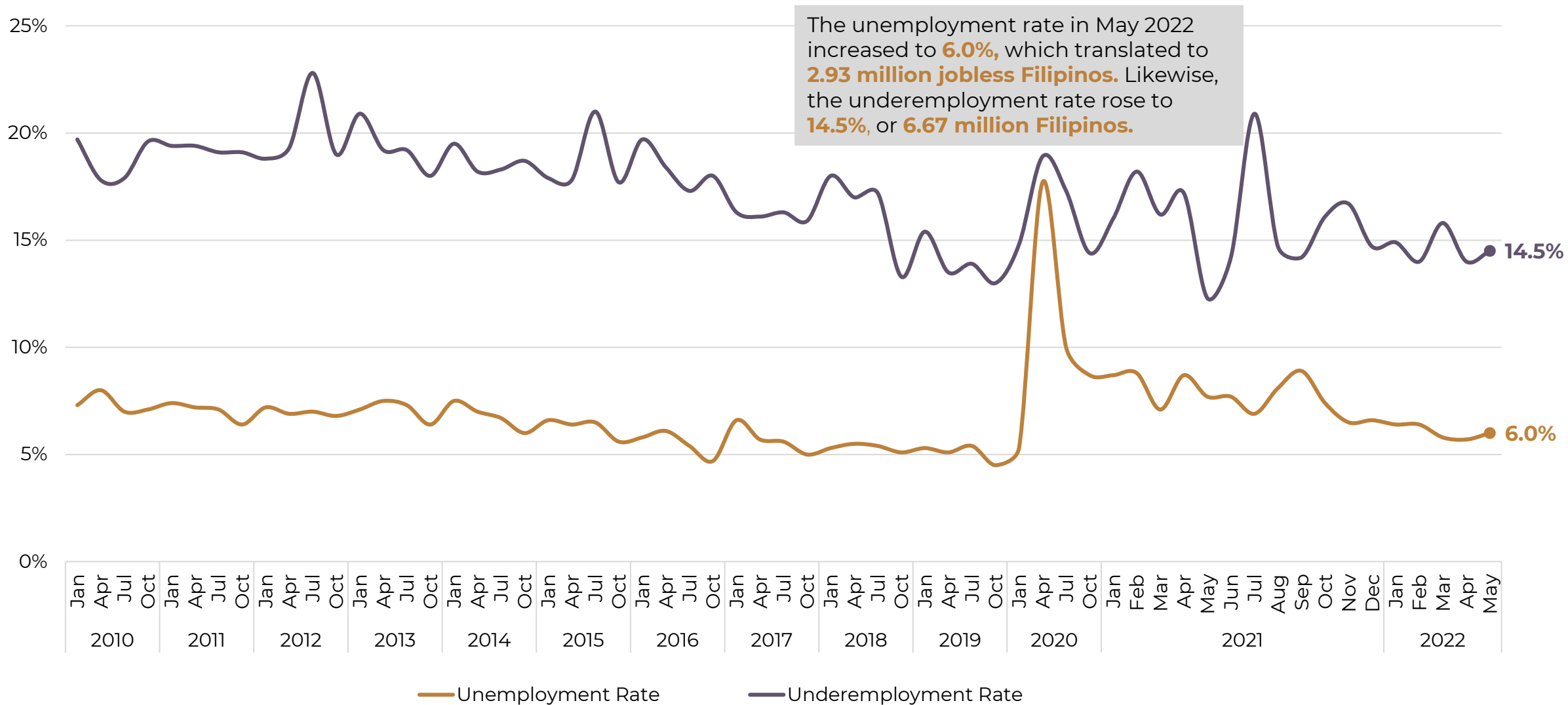
Note: Don't Know and Refused responses are not shown. All points connected by broken lines are from mobile phone surveys. Face-to-face interviewing resumed in November 2020.

*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]*

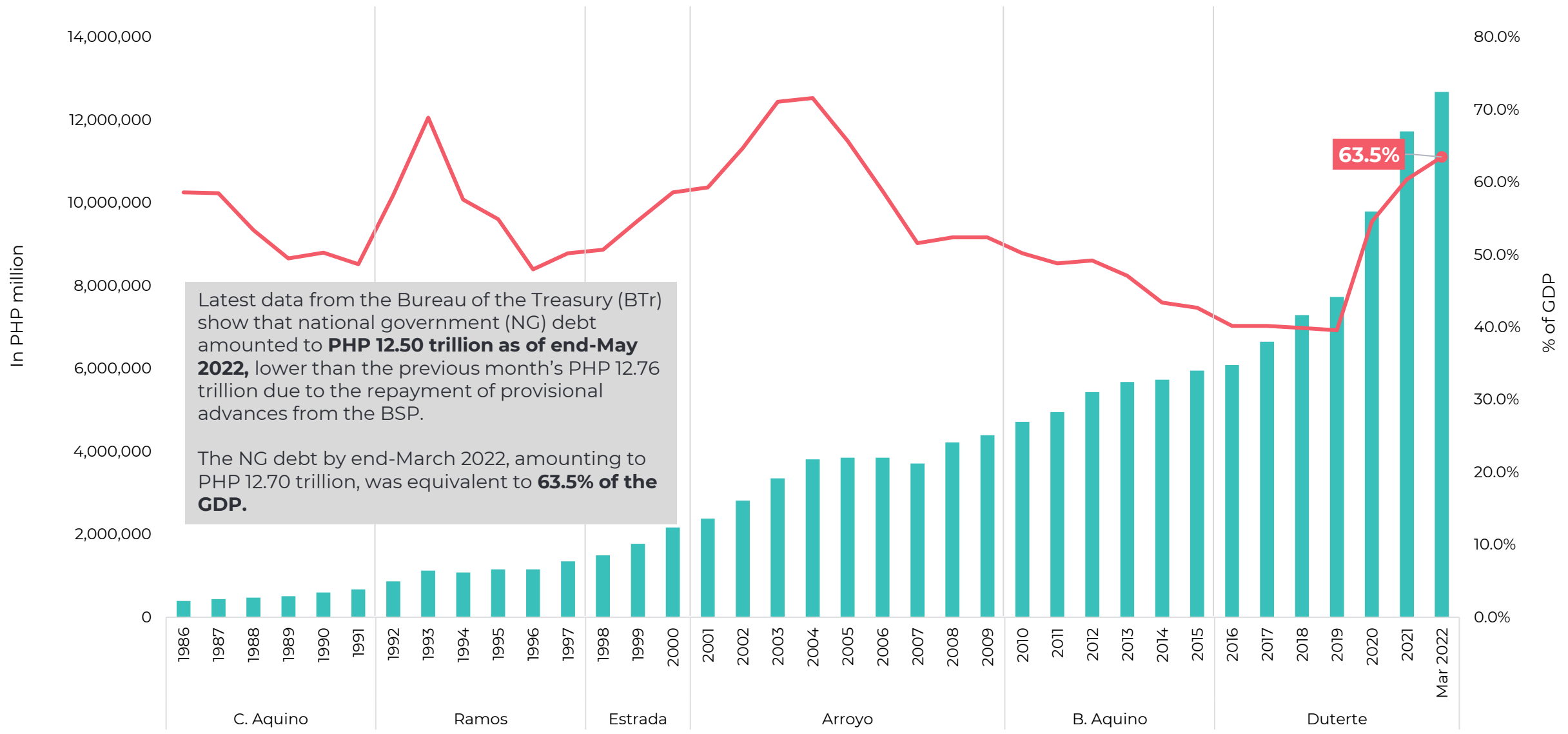
APRIL 19-27, 2022

Unemployment Rate and Underemployment Rate

January 2010 – May 2022

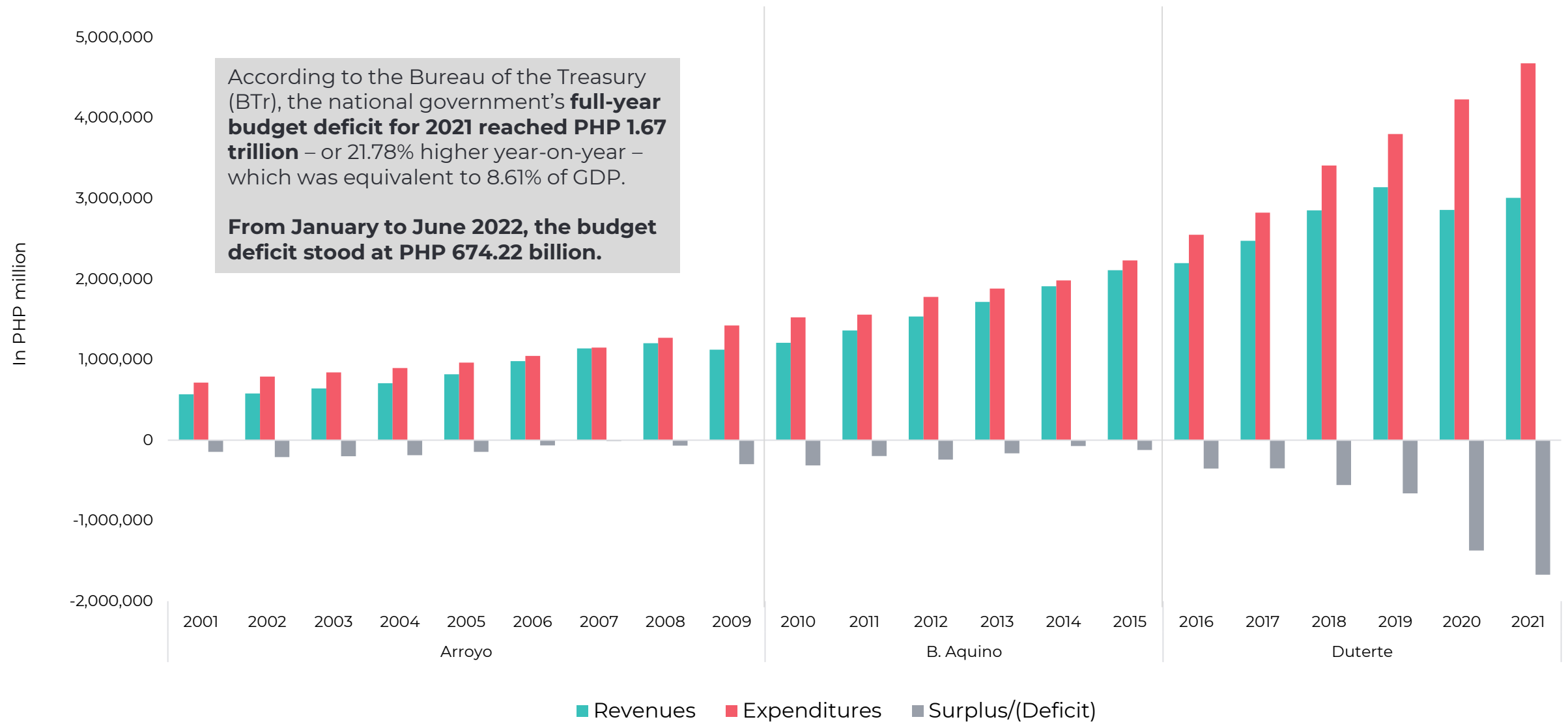


National Government Debt and as % of GDP, 1986-2022



Source: Bureau of the Treasury (BTr)

National Government Fiscal Balance, 2001-2021



Source: Bureau of the Treasury (BTr)

Selected Policy Pronouncements of President Marcos Jr. (1st State of the Nation Address)

- President Marcos Jr. stressed **the need to implement sound fiscal management**. Productivity enhancing investments will also be promoted, capitalizing on the CREATE Act, Public Service Act, and the Foreign Investments Act.
- He stated that cheap and reliable energy must be readily available in the country **to attract local and foreign investments**.
- He noted the continuation of **the “Build, Build, Build” infrastructure program** and the value of **public-private partnerships**
- The country’s **tax system will be adjusted** to catch up with the rapid developments in the digital economy, including the imposition of value added tax on digital service providers.
- He stressed **that there would no longer be lockdowns** and that public health and the economy should be balanced. The vaccine booster rollout will also be continued.





Selected Policy Pronouncements of President Marcos Jr. (1st State of the Nation Address)

continued

- He stressed the need to **develop new power plants, and use all the best technology available, especially renewable energy.** He also said that they will review **the policy on upstream gas in areas close to Malampaya** and the **strategy on building nuclear power plants.**
- He noted that the agricultural sector **will be transformed into a major contributor to the economy.**
- He said he will sign an **executive order that imposes a one-year moratorium on amortizations and interest payments of land reform beneficiaries.**
- He pledged to **modernize farms by providing farmers with new technologies.**
- He pronounced a **return to full face-to-face classes** and highlighted the **need to improve the poor quality of educational materials** in the country.
- President Marcos Jr. vowed to **stand firm in the country's independent foreign policy, "with the national interest as primordial guide."**

President Marcos Jr.'s 8-point socioeconomic agenda

1. Protect the purchasing power of families by **ensuring food security, reducing transport and logistic cost, and reducing energy cost**
2. Reduce vulnerability and mitigate scarring from the COVID-19 pandemic by **tackling health, strengthening social protection, and addressing learning losses**
3. Ensure sound macroeconomic fundamentals by **improving bureaucratic efficiency and ensuring sound fiscal management**
4. Create more jobs by **promoting investments, improving infrastructure, and ensuring energy security**
5. **Create quality jobs** by increasing employability, expanding digital infrastructure, and encouraging R&D and innovation
6. **Create green jobs** by pursuing a green and blue economy and establishing livable and sustainable communities
7. Uphold **public order and safety**, peace and security
8. Ensure a level playing field by **strengthening market competition** and reducing barriers to entry and limits to entrepreneurship

President Marcos Jr.'s Legislative Priorities

1. National Government Rightsizing Program
2. Budget Modernization Bill
3. Tax Package 3: Valuation Reform Bill
4. Passive Income and Financial Intermediary Taxation Act (PIFITA)
5. E-Government Act
6. Internet Transaction Act or E-commerce law
7. Government Financial Institutions Unified Initiatives to Distressed Enterprises for Economic Recovery (GUIDE)
8. Establishment of Medical Reserve Corps
9. National Disease Prevention Management Authority
10. Creation of Virology Institute of the Philippines
11. Creation of Department of Water Resources
12. Unified System of Separation, Retirement and Pension
13. E-Governance Act
14. National Land Use Act
15. National Defense Act
16. Mandatory Reserve Officers' Training Corps (ROTC) and National Service Training Program (NSTP)
17. Enactment of Enabling Law for Natural Gas Industry
18. Amendments to Electric Power Industry Reform Act (EPIRA)
19. Amendments to Build-Operate-Transfer (BOT) Law

The economic agenda of the Marcos Jr. government **envisions that the country would achieve middle-income status by 2024** and economic growth of 6.5% to 8% from 2023-2028.

One of the most remarkable points in this first SONA pertains to foreign policy. Reiterating his pro-Filipino stance, the president stated that he will **not give a square inch of Philippine territory** to foreigners and that the “national interest is our primordial guide” in promoting foreign relations.

The second most surprising point is the declaration of the legislative priorities of the presidency. Numbering up to 19 priorities, it means that preparations have been made and that the president has a lot in mind in terms of the country’s **political, social, and economic direction**.

However, these plans of action **still need to be explained** and so these **could address Filipinos’ most urgent concerns particularly within the year**.

Addressing Filipinos’ concerns
BusinessWorld, 26 July 2022