

2008 PHILIPPINE ENERGY SUMMIT
Summary of Issues/Concerns and Proposed Recommendations
Day 1 - January 29, 2008
Perspective Setting and Stakeholders' Concerns
Plenary Sessions: Stakeholders' Concerns

SOURCE/SECTOR	MAJOR ISSUES/CONCERNS	AFFECTED SECTORS/AGENCIES/S TAKEHOLDERS	PLANNING HORIZON* (Indicate the number)	PERSPECTIVE/REQUIRED ACTIONS/RECOMMENDATIONS	RESPONSIBLE AGENCIES/SECTORS/ STAKEHOLDERS
<p>A. Oil Industry MR. EDGAR O. CHUA Country Chairman Pilipinas Shell Petroleum Corp.</p>	<p>Challenge of producing more energy for a growing world population while stabilizing or reducing greenhouse gas emissions</p> <p>Continuing rise in energy demand</p> <p>Continuing increase of crude prices in the international market</p>	<p>All sectors</p>		<p>Encourage effective use of a finite resource</p> <p>Promote energy conservation, products that improve efficiency and lower consumption, environmentally compliant</p> <p>Combination of oil, coal, biofuels, hydro, complex energy structure in the future, no single bullet</p> <p>Pilipinas Shell Solar initiatives to lessen the cost of photo voltaic charging systems (PVCS)</p> <ul style="list-style-type: none"> - Reduce the difference between RE and oil products - More consumers improves economies of scale - On-going technology improvement - Global companies interest and utilization of solar energy <p>Mitigate local impact through:</p> <ol style="list-style-type: none"> 1. Strategic responses <ol style="list-style-type: none"> a. Demand management (energy conservation and management of CO2 emissions) <ol style="list-style-type: none"> a.1. Better traffic management <ul style="list-style-type: none"> - police enforcement measures (control "kotong" and kolorum) = increased revenues for drivers - increasing investments in mass transport systems - 24-hour repair work on roads and more investment in infrastructure a.2. Improve generation, transmission and distribution efficiencies of power plants a.3. Systemic/structural analysis and review of industry practices (e.g., thermostat setting) a.4. review personal practices on energy use <ul style="list-style-type: none"> - 70-80% has underinflated tires which increase consumption of fuel and lowers efficiency b. Fuels diversification and supply security <ol style="list-style-type: none"> b.1. Pass the RE Bill to increase investment in geothermal, wind, solar and hydro b.2. Fine tune and accelerate the implementation of the Bio Fuels Law b.3. Sustain the programs to encourage oil and gas exploration b.4. Provide incentives for investments in the oil refining industry c. Emergency preparedness d. Oil price risk management 2. Removal of taxes to mitigate price increase <ul style="list-style-type: none"> - use windfall VAT to fund the programs that will better prepare the country & our people 3. Programs to safeguard the poor <ul style="list-style-type: none"> - Every P10 billion allocation may enable each of the following: <ol style="list-style-type: none"> a. Substitution of incandescent lamp for an energy efficient fluorescent lamp (100 million light bulbs; should government SUBSIDIZE?) b. Sustainable feeding programs - 5M school aged children/year @30T/yr c. Scholarship grants - 28,000 vocational or 20,000 5-year college courses d. School classrooms - 250,000 units e. Housing - 166,666 Gawad Kalinga homes f. Primary health care centers - 25,000 4. Reduce prices by removing VAT and other taxes	<p>Government & private sector</p> <p>Pilipinas Shell Petroleum Corp.</p> <p>Government, Industrial, Commercial, Transport, Residential, Agriculture</p> <p>DOE/PELMATP</p> <p>DepEd/DSWD CHED/TESDA DepEd CFC</p> <p>DOH</p>

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<p>Ms. Elisea G. Gozun Chairperson, Earth Day Network Phils. and Former DENR Secretary</p>	<p>Oil price increase is an opportunity to fuel development without harming the environment Energy production and use are the principal contributors to climate change and air pollution (globally 65 percent of emissions comes from energy; in the Phil it is 49 percent) - globally 65 percent of emissions comes from energy; in the Phil it is 49 percent - science has proven that GHG are not just due to natural causes but mans activity which threatens our way of life - climate change is a reality in the Philippine with the occurrence of droughts and strong typhoons which have resulted to loss of lives The poor are most vulnerable and have no means to cope High fuel prices is an opportunity (stabilization of ghg is feasible) Air pollution caused by the transport sector</p>	<p>All sectors</p>	<p>Short-long term</p>	<p>Proper pricing of natural resource , including the economic valuation of its adverse impact on the environment and the people Changes in energy technologies Strong deliberate policy choices is possible to decarbonizes growth Energy conservation not just for the environment but of the individual is estimated to reduce energy use by 30 percent and we should practice it as a way of life Consider the alternative energy option Change in urban planning More prudent use of fossil fuels Develop mass transport system Government should consider targeted subsidies (reducing the VAT is not the way to go from the economic, environment and social perspectives)</p>	<p>Government & private sector</p>
<p>Mr. Sulficio O.Tagud, Jr. Chairman of the Board, Negros Navigation</p>	<p>Immediate and short term concerns: Fuel prices comprise 30-50 percent in the cost for the transport sector - Shipping and bus are biggest transporter of people High operating fuel cost and inability to raise fares (affordability concerns of the riding public leads to clamor to increase minimum wage and prices of basic commodities) Impact of high oil prices are immediately felt by the people (need to moderate the impact of high fuel prices) Import tax (the effect of offered reduction of 1 percent in import tax on oil is marginal)</p>	<p>Transport</p>		<p>Suspend vat on public transport fuel - EVAT is 4 pesos per liter with the current oil prices Roll back and peg the amount of EVAT to previous level Borrow from domestic sources since bill rates are lower than outside</p>	<p>Government & transport sector</p>
<p>B. Consumer Sector MR. RAUL T. CONCEPCION Chairman Consumer/Oil Price Watch</p>	<p>Increasing crude oil price (the under-recoveries have already been wiped out. Several proposals have been crafted by the Consumer Oil Price Watch (COPW) OIL SMUGGLING According to the DOE, in 2007 there is an estimated revenue loss of P14 Billion from smuggled crude oil into the country</p>			<p>SAFETY NETS FOR THE POOR LPG: For Residential Customers This means that the residential customer will pay P550 for 11kg tank instead of P 625 or a savings of 75 pesos as a result of the removal of the 12% VAT Using the lifeline rate of Meralco of 2,354,410 residential consumers of 150kWh, this is equivalent to P176,580,750 monthly or 2.118 Billion annually Increase the lifeline rate subsidy from 100 kWh to 150 kWh per month which means an additional 620,741 residential consumers will benefit.</p>	

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<p>Mr. Tadayuki Ogawa (Discussant)</p>	<p>Discussion:</p> <p>(1) Changes in primary energy intensity per GDP in Japan (a) Final energy consumption in the industrial sector has remained generally steady since the oil crisis. (b) Those of the commercial/residential and transportation sectors have increased significantly</p> <p>(2) Transition of Final Energy Consumption by Sector (a) Major energy sources has shifted from coal to kerosene and electricity. (b) Energy consumption in the residential sector has increased due to the following reasons: (1) total number of home appliances</p> <p>(3) Transition of household energy consumption by source (a) Major sources have been shifted from coal to kerosene, and electricity in time now. (b) energy consumption in residential sector has increased due to the following: (1) Total number of home appliances</p> <p>(4) Transition of Energy Consumption for Home Appliances - (a) Refrigerators, lighting and televisions account for a large portion of electricity consumption in the residential sector. (b) Consumption for new equipment such as toilets with warm water was</p> <p>(5) Example of energy efficiency improvement (a) energy efficiency of home appliances has been improved due to the introduction of top runner program and continuous effort by manufacturers.</p> <p>(6) Gasoline price and consumption volume (a) Consumption volume has been steady regardless of the price hike. (b) Although fuel efficiency has been improved, total number of registered vehicles has been increasing in Japan.</p>			<p>SAFETY NETS FOR THE TRANSPORT SECTOR</p> <p>Accelerate the program for METRO MANILA Buses and Jeepneys to run on CNG or LPG instead of DIESEL/Gasoline as it is cheaper</p> <p>Extend financing for the conversion and or acquisition of NEW or REBUILT CNG buses from abroad</p> <p>SAFEGUARDS UNDER RA 8479</p> <p>Any Oil Price Increase/Decrease is now easily verifiable as the Department of Energy, working closely with the BOC and the BIR to monitor the volume, value and cost of inbound Oil Shipping Lines must give advance information on ALL inbound oil tankers, i</p> <p>PROPOSED AMENDMENT TO THE VAT LAW</p> <p>Should Congress still see the need for amending the law, COPW supports the position that the VAT be suspended for 2 months only for DIESEL used by the transport sector and LPG purchased by the poor whose consumption is limited to</p> <p>Manufacturing industry of Japan succeeded in energy conservation after the Oil crisis with the following measures: (1) Cost reduction incentive - enforcement of international competitiveness and self-help effort by enterprises (2) regulation measures by</p> <p>Major amendment of Energy Conservation Law. (1) Strengthening energy conservation measures for large-scaled retrofits of the existing residence and buildings as well as new buildings. (2) Information offering from energy suppliers and appliance retailers</p>	
<p>Hon. Percival C. Chavez Chairman/CEO, Presidential Commission for the Urban Poor</p>					

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<p>Hon. Domingo Flores Panganiban Lead Convenor, National Anti-Poverty Commission</p>	<p>Lessen the vulnerability of the poor from impact of increasing oil price - prices are expected to remain at the present level as the result of the increase and double efforts to meet the challenges of the oil price movement in the rural sector where poor resides</p>			<p>Need to increase supplementary income generating activities Energy saving and conservation challenges in the urban and rural areas must be addressed. Enhance efforts towards consumer empowerment. Focus on skill, education, technical competence utilizing agencies like TESDA to ensure that all sectors are armed with skill and technical expertise. Tap schools and other institutions such as churches Greater push on accelerating the ongoing poverty reduction programs to cushion impacts on the poor.</p>	
<p>Mr. Raymond A. Marquez Acting Pres., Energy Practitioners Association of the Philippines</p>	<p>No energy conservation law (Japan have since 1979 and amended recently, Thailan, Vietnam, India, China, Malaysia and Indonesia is No energy managers in the Philippines No enercon fund (not like in Thailand – subsidy)</p>			<p>Advocacy for the passage of enercon law The institutionalization of energy managers for 1MW and above in buildings Energy Labeling Program of refrigerators, cfl Pushing for purchase of energy efficient appliances Pursue energy labels for computers Promote guideline on energy conservation (including the poor) Promote energy efficiency in buildings Push for RE if applicable to our household sector Promote the use of windmill for upland irrigation in the agriculture sector. Promote the use of charcoal for cooking in Metro Manila.</p>	
<p>C. INDUSTRY/EXPORT Mr. Meneleo Carlos Pres., Federation of Philippine Industries</p>	<p>Diesel oil for small capacity burners is increasingly expensive due to limited refinery capacities and higher taxes Heavy fuel oil for large capacity burners marketed at 3% max Sulfur Power from fuel oil costs much higher than gas, coal, geothermal energy Power generation <10% based on fuel oil, mainly in Visayas and Mindanao</p>	<p>Semi-Conductor Industries</p>		<p>Should shift to cheaper heavy fuel oil (bunker fuel oil) DENR should permit continued use of this Sulfur level Large heat energy users should shift to gas, coal and geothermal heat sources for economy and provided capital investment incentives Bulk natural gas is cheaper and cleaner than petroleum sources Private bulk LNG terminals and pipelines should be supported Domestic gas should be priced competitively versus imported gas by adjusting royalty take Adjust royalties for thermal plant running on geothermal to be competitive with thermal plant running on coal WESM pricing therefore very sensitive to dispatch of fuel oil based power Negotiate open access ASAP for industry to source from lowest cost power suppliers and avoid fuel-oil based power Consider retrofitting of thermal plants to coal Island grids and eco-zones served by fuel oil driven power plants can be cost competitive by avoding/minimizing transmission and distribution costs which reach 20% of power bill</p>	<p>DOE DENR, DOE DOE WESM TRANSCO and NPC IPP and DOE NPC-SPUG, NEA, TRANSCO</p>

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	<p>Petrochemical prices have escalated rapidly in line with crude oil</p> <p>Competitive alternatives require thorough cost analysis of every alternative considering viability of technology, financial, land resources, etc.</p> <p>Food for fuel Food security Allocation of land resources</p> <p>Environmental issues Destruction of forests for palm oil crops</p> <p>Reminder to be competitive</p>	<p>Petrochem Industry</p> <p>Farmers, Land Owners</p>		<p>Shift of petrochemical capacities to energy-rich countries while traditional capacities remain or have shut down Conduct studies to restore natural sources of products formerly displaced by petrochemicals Bio-diesel co-product glycerine is becoming major source again Cellulose - to - ethanol will be major source of future ethanol which R&D should be supported Return to old processes to produce fuels and chemicals from coal and electricity Coal supplies more extensive and prices are more stable Environmental considerations favor the shift from plastics to paper, i.e. towards biodegradability of consumer products that go to waste</p> <p>Consider wind-hydro storage combinations for isolated users Biodiesel from natural oils from coconut, jatropha, malunggay, etc. Ethanol from fermentation of sugars, biomass, etc. Gasification of charcoal and coal Hydro, geothermal, wind, nuclear and hybrid combinations for electricity</p> <p>Inform the farmers on what to plant and should be brought/phased in gradual manner</p> <p>Consider extensive reforestation and commercial tree plantations</p> <p>Benchmark all our costs versus our competitors in the region Be transparent and act</p>	<p>SHELL (interested)</p> <p>DA, DENR, DAR</p> <p>DA, DAR and DENR</p>
<p>DISCUSSANTS Mr. David O. Valdez Pres., WWF - Phils.</p> <p>Mr. Jose Maria Zabaleta Sr. Exec. Dir., Phil. Sugar Millers Associator</p> <p>Ms. Zenaida Maglaya Usec., SME Development - DTI</p>	<p>Dependence on fuel oil and emission of GHG</p> <p>Fishing Industry - 60% fuel costs (pump boats) Archipelagic setting of the Philippines makes the transportation of crops expensive due to high fuel cost</p> <p>Impact of increase in fuel price to business depends on the intensity in the use of energy</p>			<p>Ensure energy independence and reduce global emissions Working with Renewable Energy and less dependence on imported fuel oil Reduced energy consumption via Energy Efficiency and Conservation Performance standards for appliances Operation standards for building Fuel efficiency standards for vehicles/transport Energy Efficiency Legislation Break linear relationship between economic growth and energy consumption Industry to adopt voluntary energy intensity reduction</p> <p>Establish One-Stop on Biofuels and Renewable. Regulate and correct market standards</p> <p>Provide comfort level in the privatization of power plants</p>	

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Ms. Lilia De Lima Director General, PEZA	Global Competitive rates to attract investors considering that 94% of the locators are into exports, of which 51% come from semi conductor			Discount rate to locators in ecozones and reduce cost to end-users Assists PEZA locators in capacity utilization to reduce cost Accelerate implementation of Open-Access within Ecozones PEZA to provide incentives to locators to use and develop Biofuels Industry (Agri-Industrial) Massive replacements of incandescent bulbs to CFLs Locators are encouraged to use solar power	
Questions & Answers: Is it possible to set up PEZA on sites with good potential for geothermal power development? DG De Lima: - Yes, PEZA is prepared to assist to declare this areas as economic zones with the active participation from private sector Why can't senators forgo their pork barrels? Mr. Carlos: - We will try to sell the idea. Why is the government addicted to imports? Mr. Carlos: - Its market driven, let market forces dictate.					
D. Transport Sector ATTY. VIGOR MA. D. MENDOZA II Chairman United Transport Koalisyon (1-UTAK)	Soaring prices of oil products: Jeepney fares in the last 8 years were increased 3 times by over 30% per , with diesel pump price also increasing at a higher rate of over 40% in each year that fares were adjusted. Fuel price has jumped by 39%. Based on historical figures, jeepney transport fares today should be around P10.00 on the 1st 4 kms. The present jeepney petition pending at the LTFRB is merely asking for a 20% increase, from P7.50 to P9.00 on the 1st 4 kms Absence of legal basis to hold back a fare increase	LTFRB LTFRB LTFRB	2 2 2 2 3 3 3 3 3 4 4 4 4 4	Speed up the processing of transactions in DOTC frontline offices Expand "anti-colorum" campaign outside Metro Manila Oil companies to increase number of gas stations giving discounts; apply to gasoline Reduce all fees, fines and other charges imposed by DOTC front line offices Provide more social services to the transport sector Implement single traffic ticketing system nationwide DOTC to develop a sound national transport policy Provision of enabling law to mitigate the impact of high fuel cost: Address proliferation of unnecessary terminals Stop over issuance of tricycle franchises in the province Low interest financing and easy loan processing to PUV operators Exempt petroleum products from E-Vat Review all road plans with fixed number and the kind of PUVs Institutionalize the PUV discount by maintaining a two tier pricing for PUVs and private vehicles. Amend the local government code, the public service act and the tax code	DOTC DOTC, LTO Oil companies DOTC DILG DILG DOF House of Representatives DOTC DOE House

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Usec. Annelie Lontoc Department of Transportation and Communication	Soaring prices of oil products Problem on inspection system Rampant occurrences of "colorum-kotong"	Transport sector LTFRB Transport group		Conduct the Transport Sector Summit to address oil price increases Strategies: Increase fuel efficiency Enforcement of vehicle standards Switching to alternative fuels Switch to high-efficient mode of transport Clearing of roadway obstructions Adopt and implement Land Transport Policy (currently being discussed which includes transport and land use fund, clear delineation of LGS, road safety and transport technologies Provide incentives for the promotion of alternative fuel Creation of transport leasing program, re-fleeting of transport Stricly address "red tape" on franchise document processing	DOF SEFEELS
Mr. Robert C. Nacianeno General Manager, Metro Manila Development Authority	Continuous growth in the number of motor vehicles - increasing demand trend of motor fuel - 5 to 10% fuel loss due to traffic "Kotong" and "colorum" problems			Improve traffic situation through efficient road system Invest on training people Implement parking discipline program Improve communication system (1206 AM radio station on MMDA on traffic report) Establishment of clear way, free flowing road Road emergency program (obstructions are remove 15 mins. after call) Continuous flood mitigation measures - currently removing obstruction to Pasig river (15 meters from Pasig river) Bus route project: Microchips to identify buses Consider the adoption of an on advocacy freeway/clearway Develop alternative mode of transport such as Ferry Boat System and Railway Sys Work hand in hand with other agency such as DOE-SEFEELS	DOTC DOE
Mr. Fernando L. Martinez Chair, Independent Philippine Petroleum Companies Assoc. President, Eastern Petroleum Corp.	Stand on VAT suspension (specific tax is more socialized) Oil price increases	Transport group, consumer group Transport group, consumer group		Revisit oil deregulation - Amenable to dedicated station, giving discount.	Congress
Atty. Angela Consuelo S. Ibay Program Manager, KLIMA Climate Change Center, Manila Observatory	Environmental concerns	DOE/DENR private sector		Measures with co-benefit approach to improve air quality conditions and reduce carbon dioxide emissions: Use motorized transport Preventive maintenance 40% fuel consumption from vehicles when not properly maintained goes up in smoke in carbon dioxide Promote alternative fuels for cleaner air Innovative technologies to be considered in fuel efficiency Use of mass transit (MRT, etc) Look into biology; research on additives as source of fuel to lessen dependence on fuel Policy should be based on science	DOE/DENR private sector

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Questions & Answers:	- Why do jeep drivers refuse to turn off their engine while refueling? - How would you feel about deregulating the jeepney industry? De-regulating franchise?			Jeepney modernization program to affect more than 4,000 jeepneys Solve "colorum"; otherwise, deregulate jeepney industry "Colorum" issue should be address first, otherwise liberalize it.	
E. Labor Sector					
HON. CRISPIN S. BELTRAN Partylist Representative ANAKPAWIS	Frequent price increase of oil in the international oil market and the impact of EVAT on local oil prices devaluated the purchasing power of peso Wages of workers has increased by only 18% since 2001 as compared with the increase in oil prices of not less than 140% Exploration of Indigenous energy resources such as geothermal and coal are left for exploration and development by foreign companies, making the country heavily dependent on imported oil products. Implementation of the deregulation law in 1996 resulted to increases in gasoline (by 352%), diesel (by 434%), kerosene (by 454%) and LPG (by	Labor sector	Short-term Short-term Short-term Medium-term Medium-term	Ensure adequate and continuous supply of crude oil and refined petroleum products under the most economic and competitive terms possible Ensure that the petroleum industry look towards the national interest and economic needs of the country Ensure that the consuming public enjoy reasonable prices of petroleum products through the prevention of price manipulation, unfair competition and other trade abuses Promote Filipino capital, labor and technology both in the upstream and downstream oil industry Managing oil price risk and reduction of oil dependency thru: 0% VAT on Oil Moratorium on Oil Price Hikes Repeal Oil Deregulation Law Re-nationalize Petron Centralize Petroleum Procurement Regulate the Downstream Oil Industry	DOE DOE DOE, industry players DOE, private sector Congress, DOE, DOF
Amb. Donald G. Dee Chairman, PCCI	Impact of high oil prices on the labor sector	Labor sector	Short-term Medium-term Medium-term	Revenue from EVAT directed to poor sector of society Support removal of royalties for natural resources used for domestic consumption Change mindset on taxation (more on consumption tax)	DOF, Congress Congress, DOE DOF, BIR, Congress
Asec. Ma. Theresa Soriano DOLE	Negative effects of high oil prices on the purchasing power of the Filipino workers	Labor sector	Short-term	D development of the program on "Kabuhayan para sa Manggagawa" (Workers' Income Augmentation Program) to provide additional income generating activities for minimum wage earners which will eventually cushion the impact of high oil prices on the purchasing	DOLE

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Mr. Ferdinand R. Gaité President, COURAGE	Effects to Filipino workers: - increasing expenditures on fuel, light, water and transportation - decrease in real income - increases in loss of jobs		Short-term Medium-term Long-term	Control oil prices and reduce taxes - repeal R-VAT on oil and petroleum products - socially sensitive products like LPG, diesel and kerosene should be stabilized and subject to price controls Develop a strong national oil and energy industry owned and controlled by Filipino	

*Can be addressed within the following period criteria:

1. Immediate (Within 6 months)
2. Short Term (Within 1 year)
3. Medium Term (Within 2 to 5 years)
4. Long Term (Over 5 years)