出國報告(出國類別：出席國際會議)

出席「2018 年 APEC 評估服務業環境之資料蒐集技巧能力建構研討會」出國報告書

摘要

「2018 年 APEC 評估服務業環境之資料蒐集技巧能力建構研討會」於 11 月 5 日至 6 日在菲律賓馬尼拉舉行，由美國政府自費辦理，利用 2 天的研討會提升 APEC 經濟體評估服務業法規環境之蒐集及採用資料的能力，此研討會係依據去年舉辦「APEC 服務業貿易指標資料研討會」(APEC Trade in Services Index Data)成果建議而來，並呼應 APEC 服務業競爭力路徑圖(ASCR)第 13 項行動計畫發展服務業統計資料以衡量路徑圖執行成效。本次研討會計有澳洲、智利、大陸、印尼、日本、馬來西亞、巴紐、秘魯、菲律賓、美國、越南及我國等 12 個經濟體參與，出席者及工作人員總計 38 人，我方由本局派員與會。

本次活動美國政府全程委由美國 APEC 高階區域整合技術援助計畫(US-ATAARI)負責執行，席間由美國駐菲律賓大使館經濟官 Stephanie Moniot (Economic Officer)開幕致詞，美國國務院對外事務官 Jessica Mazzone (Foreign Affairs Officer) 及來自 WTO、OECD 與 APEC 經濟體專家擔任講者。

評估服務業環境之資料蒐集技巧研討會的目的係加強經濟體工作階層官員評估服務業環境所使用資料之能力，會議第一天主要說明服務業的重要性、衡量服務貿易之方法及介紹國際現有的服務貿易統計資料庫，如 WTO 服務貿易資料庫及 OECD 貿易附加價值 TiVA(Trade in Value Added)統計，第二天說明 APEC 服務業工作小組(GOS)下進行 APEC Index 專家會議之進展，並介紹 OECD 服務貿易限制指標(STRI)資料庫之應用，美方數次強調 APEC STRI 宜參考 OECD 版本為宜。

目錄

壹、 會議時間

107 年 11 月 5 日至 6 日

貳、 會議地點

菲律賓馬尼拉半島酒店二樓會議室(The Peninsula Hotel, 2F Conservatory Room)。

參、 會議目的

評估服務業環境之資料蒐集技巧研討會的目的係加強 APEC 經濟體工作階層官員評估服務業法規環境時,所需蒐集及採用資料的能力。此研討會係依據去年舉辦「APEC 服務業貿易指標資料研討會」(APEC Trade in Services Index Data)之成果建議而來,並呼應 APEC 服務業競爭力路徑圖(ASCR)第 13 項行動計畫發展服務業統計資料以衡量路徑圖執行成效。

肆、 會議議程

2018 年 APEC 評估服務業環境之資料蒐集技巧能力建構研討會議程

2018 年 11 月 5 日(一)
09:00 – 09:20 **開場致詞:** 美國駐菲律賓大使館經濟官 Ms. Stephanie Moniot (Economic Officer)
09:20 – 09:45 **活動說明:** 美國 APEC 高階區域整合技術援助計畫(US-ATAARI)負責執行,本次活動由計畫主持人 Mr. Alex Ginn(Associate, US-ATAARI)說明會議進行方式及分組討論進行方式。接續請與會者自我介紹。
09:45 – 11:00 **第 1 場次 介紹服務業的重要性**

側重於服務貿易在全球經濟中的重要性，包括點出阻礙外人投資和服務出口的政策障礙，以及經濟自由化和消除服務出口壁壘所帶來的益處。

講者 1: 美國發展貿易顧問團主任 Dr. Ben Shepherd

講者 2: WTO 研究員 Ms. Justin Lan

11:00 – 11:30 休息 茶點時間

11:30 – 12:00

第 2 場次 「分析服務貿易第 1 部分」

本場次聚焦如何定義和衡量服務貿易，以及衡量服務貿易面臨的挑戰與困難。

講者: 美國國務院對外事務官 Jessica Mazzone (Foreign Affairs Officer)

12:00 – 13:00 午餐

13:00 – 14:15

第 3 場次 「分析服務貿易第 2 部分」

在前一場次的基礎上，介紹國際組織在服務貿易統計的工作，如 WTO 的服務貿易資料庫及 OECD 貿易附加價值 TiVA(Trade in Value Added)統計。

主持人: 太平洋經濟合作委員會(PECC)秘書長 Mr. Eduardo Pedrosa

與談人 1: 美國發展貿易顧問團主任 Dr. Ben Shepherd

與談人 2: WTO 研究員 Ms. Justin Lan

與談人 3: OECD 貿易統計組長 Dr. Fabienne Fortanier

14:15 – 15:30

第 4 場次 APEC 經濟體案例分析分享

邀請澳洲、印尼及秘魯政策專家分別就旅遊觀光、資料開放及電信法規及資料透明化分享使用資料改變政策的經驗。

主持人: 美國發展貿易顧問團主任 Dr. Ben Shepherd

與談人 1: 澳洲對外事務及貿易部一等經濟秘書 Ms. Jenni McEwin
與談人 2: 印尼電信監管機構委員 Dr. Taufik Hasan
與談人 3: 秘魯電信法規監管機構副理 Mr. Marco Vilchez
15:30 – 16:00 休息 茶點時間
16:00 – 17:30 **第 5 場次 分組討論:促進服務貿易政策改革 1** 與會者進行分組討論,分享國內不同業別進行改革之現況及該業別資料的蒐集及使用方式。
17:30 – 18:00 結語 (計畫主持人 Mr. Alex Ginn 回顧今日的課程)
2018 年 11 月 6 日(二)
09:00 – 09:10 開場 計畫主持人 Mr. Alex Ginn 回顧昨日的課程
09:10 – 09:45 **第 6 場次 APEC 服務業工作之進展** 報告 APEC 服務業工作小組(GOS)下,APEC 指標專家小組之進展。 講者: APEC 秘書處政策支援小組(PSU)分析師 Mr. Andre Wirjo
09:45 – 10:45 **第 7 場次 衡量服務貿易法規環境** 介紹 OECD 服務貿易限制指標(STRI),包括建立 STRI 目的,以及介紹 STRI 方法論及工具。 講者: OECD 貿易政策分析師 Mr. Janos Ferencz

10:45 – 11:15 休息 茶點時間
11:15 – 12:30 **第 8 場次 改善法規透明化及促進政策改革** 本場次聚焦學習利用 OECD STRI 指標改善法規透明化之訓練，以及檢視政策改變後對指數的影響。 講者: OECD 貿易政策分析師 Mr. Janos Ferencz
12:30 – 13:45 午餐
13:45 – 15:30 **第 9 場次 分組討論：促進服務貿易政策改革 2** 與會者進行分組討論，分享國內不同業別進行改革之現況及該業別資料的蒐集及使用方式。
15:30 – 16:00 休息 茶點時間
16:00- 16:30 總結

伍、 會議過程

一、 美國政府舉辦研討會之動機

美國舉辦本次活動之動機，係遊說經濟體在選定 APEC 服務貿易基礎指標上，以 OECD 服務貿易限制指標(STRI)為主，透過加強經濟體工作階層官員認識 OECD STRI 指標，進而提升經濟體官員評估服務業環境使用資料之能力。會議第一天主要說明服務業的重要性、衡量服務貿易之方法及介紹國際現有的服務貿易統計資料庫，如 WTO 服務貿易資料庫及 OECD 貿易附加價值 TiVA(Trade in Value Added)統計，第二天說明 APEC 服務業小組(GOS)下進行 APEC Index 技術小組會議之進展，並介紹 OECD 服務貿易限制指標(STRI)資料庫之應用，美方數次強調

APEC STRI 宜參考 OECD 版本。

本次研討會計有澳洲、智利、大陸、印尼、日本、馬來西亞、巴紐、秘魯、菲律賓、美國、越南及我國等 12 個經濟體參與，出席者及工作人員總計 38 人，我方由本局多邊貿易組陳雅玲二等經濟秘書出席與會。

本次活動美國政府全程委由美國 APEC 高階區域整合技術援助計畫(US-ATAARI)負責執行，席間由美國駐菲律賓大使館經濟官 Stephanie Moniot (Economic Officer)開幕致詞，美國國務院對外事務官 Jessica Mazzone (Foreign Affairs Officer)及來自 WTO、OECD 與 APEC 經濟體專家擔任講者。

二、評估服務業環境之資料蒐集技巧能力建構研討會

（一） 開幕致詞

本次研討會由美國政府駐菲律賓大使館經濟官 Stephanie Moniot (Economic Officer)開幕致詞，M 經濟官首先說明本研討會目的係加強 APEC 經濟體工作階層官員評估服務業法規環境時，所需蒐集及採用資料的能力。此研討會係依據去年舉辦「APEC 服務業貿易指標資料研討會」(APEC Trade in Services Index Data)之成果建議而來，並呼應 APEC 服務業競爭力路徑圖(ASCR)第 13 項行動計畫發展服務業統計資料以衡量路徑圖執行成效。

M 經濟官續說明美國對服務貿易非常重視，願意與 APEC 經濟體一同加強服務貿易之出口，APEC 正在發展服務貿易衡量指標，伊強調美國大力推薦 OECD 服務貿易限制指標(STRI)作為 APEC 服務貿易基礎指標之版本。接續 M 經濟官介紹本次活動由美國 APEC 高階區域整合技術援助計畫(US-ATAARI)負責執行，由美國國務院出資贊助。最後期盼與會官員在 2 天研討會後都能滿載而歸，學以致用。

（二） 各場次會議重點：

1. **服務業的重要性：**側重於服務貿易在全球經濟中的重要性，包括點出阻礙外人投資和服務出口的政策障礙，以及經濟自由化和消除服務出口壁壘所帶來的益處。由美國發展貿易顧問團主任 Dr. Ben Shepherd 及 WTO 研究員 Ms. Justin Lan 主講，會議重點如下：

(1) 服務業在國內經濟和國際貿易中扮演的角色日益重要，以 APEC 區域為例，1990 年服務業佔國內生產毛額(GDP)約 50%，到 2015 年服務業佔 GDP 達 60%。在勞動就業市場方面，APEC 區域在 1995 年服務業就業人口佔總就業人口超過 50%，到 2015 年服務業就業人口佔總就業人口接近 65%。服務業成長通常會帶動國家經濟成長，服務業通常也是外人直接投資的標的，提高服務貿易的交易性可增加貿易及就業機會，因此，創造一個有利於服務業發展的政策及環境成為近年來各國政府思考的方向。

(2) 服務貿易受到邊境後之措施(behind the border measures)也就是國內規章的規範。由於不透明的規範會造成不可預測性，給企業帶來不必要的負擔，並阻礙投資。因此國內規章透明化成為吸引服務業投資及發展服務貿易的關鍵。

(3) 經濟自由化的過程，需要有良好的國內規章輔助才能達成真正有意義的自由化。國內規章可以在下列方面輔助經濟自由化：

　a. 透明化及可預測性。

　b. 建立獨立的監管機構並確保有足夠的資源，以有效地執行規範。

　c. 監管機構間需有良好的協調，以實現預期的公共政策。

(4) 服務業改革的困難:

a. 服務業措施所造成的結果，往往不是短期內就能取得評估分析，這類資訊的缺乏使得服務業是否需要改革或繼續受保護，變得難以分析。

b. 服務業涵蓋許多行業，每個行業有其特殊性，改革方式不盡相同，必須依照該行業發展現況量身訂製適用的法規。

c. 過度管制影響服務業發展及毫無規範造成不公平現象，兩者之間需取得平衡。

(5) 儘管服務業改革困難，但是改革所產生的效益卻會提升競爭力，尤其當改革的業別為經濟骨幹如電信業、交通運輸業、能源等時，創造的效益及影響力十分可觀。以 APEC 經濟體電信業改革為例，馬來西亞、越南、菲律賓及我國在完成電信改革後，該產業均大幅成長超過 10%。

(6) 2010 年至 2017 年間，APEC 區域成長最快的業別分別為電信、電腦、資訊業成長 60%，其他商業服務業成長 48%，金融服務業成長 42%，觀光旅遊業成長 33%。

(7) 在數位時代下，服務業議題因科技的創新變得更加複雜及多元，講者列舉包括:WTO 規範、市場進入、競爭、貿易便捷化、暫免課徵電商關稅、貿易發展、網際網路開放、資料傳輸、資料在地化、隱私及個資保護、政府資料開放、標準及法規調和、事先許可、透明化、線上消費者保護、防治垃圾郵件、網路安全、電子簽章/電子合約、電子支付、責任和管轄權、原始碼/營業秘密、科技條件等議題都應納入考量。

2. **「分析服務貿易第 1 部分」**：聚焦如何定義和衡量服務貿易，以及衡量服務貿易面臨的挑戰與困難。由美國國務院對外事務官 Jessica Mazzone (Foreign Affairs Officer)主講。會議重點如下：

(1) 講者分析服務貿易具有看不見的特性，所以在資料蒐集方面會比商品難多了，商品的價值固定容易計算，但服務卻僅能靠估計來推算，商品貿易有明確的進出口以追蹤，服務貿易要找出消費者及供應商則較難追蹤。但是即使有這些困難，國際間如 WTO 及 OECD 仍在服務貿易的資料蒐集上做了很多努力。

(2) 美國服務貿易資料蒐集主要來自 1)大量的基礎問卷調查、2)國際投資及服務貿易問卷調查法(International Investment and Trade in Services Survey Act)授權的法定問卷調查及 3)降低紙本作業法(Paperwork Reduction Act)之行政調查等三方來源。其中以美國經濟分析局(Bureau of Economic Analysis, BEA)執行國際投資及服務貿易問卷調查法授權的法定問卷調查所蒐集的資料最完整，因為該項資料包括各行服務業的國際收支平衡統計及跨國企業活動，由於填寫法定問卷調查是強制性措施，未能完成填寫的企業將依法受罰款處分，而企業所提供予美國政府之資料均列為機密保存。

(3) 在美國貿易問卷調查通常集中在金融服務業、交通運輸服務業、保險服務業、特別選定的服務業及智慧財產權。美國經濟分析局每 5 年會進行一次產業普查並建檔，每年及每季則抽樣調查，無須建檔的公司資料則依照過去企業自動提報機制存入最近趨勢資料中。

(4) 問卷調查的資料會經過會計及經濟專家檢視後才存檔，專家們會比對企業過去的表現、與填報人溝通及其他資料來源(如組織圖表、法定填報事項、金融報表及其他經濟分析局的調查)等方式檢視，以確認資料之真實性。綜合上述問卷調查、行政資料、產業報告及對手國資料製作成服務業資料，主要分類為保養及維修服務業、交通運輸服務業、旅遊業(含所有目的包括教育)、保險服務業、金融服務業、智慧財產權使用費、電信電腦及資訊服務業、其他商業服務業、政府商品及服務等。蒐集上述資料的目的就是在衡量服務貿易統計，

但是這些資料也只能反映現實世界的大部分服貿統計，不能代表全部。

(5) 評估障礙:評估貨品貿易的障礙可以直接看關稅，就算是非關稅貿易障礙也可以用約當關稅來估算。但是評估服務貿易的障礙則顯得難多了，因為服務規格往往比商品規格複雜。服務取決於品質、速度、語言等等複雜之異質因素，因此以供應模式互動來看的服務貿易到底是可替代性還是互補性也顯得複雜。儘管服務貿易有容易隱藏難以辨認的特性，我們還是要試圖將隱藏的服務貿易找出來。弔詭的是服務貿易限制指標可能會比服務貿易統計更容易顯示。

3. 「分析服務貿易第 2 部分」：在前一場次的基礎上，介紹國際組織在服務貿易統計的工作，由太平洋經濟合作委員會(PECC)秘書長 Mr. Eduardo Pedrosa 擔任主持人，並與美國發展貿易顧問團主任 Dr. Ben Shepherd、WTO 研究員 Ms. Justin Lan、OECD 貿易統計組長 Dr. Fabienne Fortanier 等專家與談。會議重點如下：

(1) WTO 服務貿易資料庫：

a. WTO- UNCTAD-ITC Trade in Services Datasets

此資料庫由世界貿易組織、聯合國貿易暨發展會議及國際貿易中心之統計資料合製，目前服務貿易統計部分已與貨品貿易統計併入 WTO 資料入口網 (data.wto.org/en)，需在左邊指標(indicator)項下點選國際貿易統計 (international trade statistics) ->商業服務貿易統計(trade in commercial services) 才會顯示。此資料庫顯示之商業服務出口和進口符合國際收支服務分類 （EBOPS 2010），且以國際貨幣基金(IMF)國際收支和國際投資手冊第六版 （BPM6）為基礎，並更詳細。以 APEC 2015 年至 2017 年商業服務貿易統計為例，搜尋出的資料如下:

表一 2015-2017 APEC 商業服務貿易出口額(單位:百萬美元)

Reporting Economy 報告經濟體	Product 產品/Sector 業別	Partner Economy	Year	2015	2016	2017
	商業服務業 BOP6 - SOX - Commercial services[1]	World		1,900,733	1,913,621	2,019,499
	貨品相關服務業 BOP6 - SPX4 - Goods-related services[2]	World		68,154	74,504	76,887
	-在他人擁有的貨品上進行製造服務業 BOP6 - SA - Manufacturing services on physical inputs owned by others	World		28,429	30,425	30,473
	-保養及維修服務業 BOP6 - SB - Maintenance and repair services n.i.e.	World		39,725	44,079	46,414
Asia-Pacific Economic Cooperation (APEC)	交通運輸服務業 BOP6 - SC – Transport	World		342,949	317,996	335,340
	-海運 BOP6 - SC1 - Sea transport	World		160,951	142,092	146,875
	-空運 BOP6 - SC2 - Air transport	World		143,165	137,629	146,748
	--客運航空 BOP6 - SC21 - Passenger (Air)	World		84,427	81,391	
	--貨運航空 BOP6 - SC22 - Freight (Air)	World		24,995	23,972	
	旅遊業 BOP6 - SD – Travel	World		535,639	553,375	569,495
	其他商業服務業 BOP6 - SOX1 - Other commercial services[3]	World		953,991	967,746	1,037,777
	營造業 BOP6 - SE - Construction	World		50,486	43,775	55,389
	保險及年金服務業 BOP6 - SF - Insurance and pension services	World		38,622	37,070	40,804

---

[1] 依據該資料庫技術文件(technical note)顯示，全部服務業(total services)分為在他人擁有的貨品上進行製造服務業、保養及維修服務業、交通運輸服務業、旅遊業、營造業、保險及年金服務業、金融服務業、智慧財產權使用費、電信電腦及資訊服務業、其他商業服務業、個人文化及娛樂服務業、政府商品及服務等 12 類。商業服務業(commercial services)包括上述前 11 項，不包括政府貨品及服務。

[2] 貨品相關服務業包括在他人擁有的貨品上進行製造服務業、保養及維修服務業等二項。

[3] 依據該資料庫技術文件(technical note)顯示，其他服務業(other services)包括營造業、保險及年金服務業、金融服務業、智慧財產權使用費、電信電腦及資訊服務業、其他商業服務業、個人文化及娛樂服務業、政府商品及服務等 8 類。其他商業服務業(other commercial services)包括上述前 7 項，不包括政府貨品及服務。

金融服務業 BOP6 - SG - Financial services	World	174,479	172,156	183,895
智慧財產權使用費 BOP6 - SH - Charges for the use of intellectual property n.i.e.	World	185,084	186,939	199,285
電信電腦及資訊服務業 BOP6 - SI - Telecommunications, computer, and information services	World	104,874	111,916	119,341
電腦服務業 BOP6 - SI2 - Computer services	World	54,787	60,926	65,582
資訊服務業 BOP6 - SI3 - Information services	World	10,073	10,423	12,208
其他商業服務業 BOP6 - SJ - Other business services	World	388,931	403,908	426,363
研究及發展服務業 BOP6 - SJ1 - Research and development services	World	52,964	57,415	60,795
專業及管理諮詢服務業 BOP6 - SJ2 - Professional and management consulting services	World	144,786	157,303	160,453
建築服務業 BOP6 - SJ311 - Architectural services	World	5,116	4,275	2,235
工程服務業 BOP6 - SJ312 - Engineering services	World		31,717	18,468
科學及其他技術服務業 BOP6 - SJ313 - Scientific and other technical services	World		16,700	11,240
個人、文化及娛樂服務業 BOP6 - SK - Personal, cultural, and recreational services	World	11,140	11,620	12,355
視聽相關服務業 B OP6 - SK1 - Audiovisual and related services	World	4,070	4,603	4,727
其他個人、文化及娛樂服務業 BOP6 - SK2 - Other personal, cultural, and recreational services	World	7,070	7,017	
未分類服務業 BOP6 - SN - Services not allocated	World	373	356	344
全部服務業 BOP6 - S - Memo item: Total services	World	1,933,633	1,944,919	2,051,672

				986,891	999,045	**1,069,949**
其他服務業 BOP6 - SPX1 - Memo item: Other services		World				
政府貨品及服務 BOP6 - SL - Memo item: Government goods and services n.i.e.		World		32,900	31,298	32,172

表二 2015-2017 年 APEC 商業服務貿易進口額(單位:百萬美元)

Reporting Economy	Product/Sector	Partner Economy	Year	2015	2016	2017
Asia-Pacific Economic Cooperation (APEC)	商業服務業 BOP6 - SOX - Commercial services	World		**1,952,734**	**1,968,313**	**2,084,981**
	與貨品相關服務業 BOP6 - SPX4 - Goods-related services	World		49,509	50,320	52,191
	交通運輸業 BOP6 - SC - Transport	World		445,285	429,416	465,477
	旅遊業 BOP6 - SD - Travel	World		621,239	640,403	669,873
	其他商業服務業 BOP6 - SOX1 - Other commercial services	World		836,701	848,173	**897,440**
	全部服務業 BOP6 - S - Memo item: Total services	World		1,986,435	2,002,325	2,120,626
	其他服務業 BOP6 - SPX1 - Memo item: Other services	World		870,402	882,186	**933,086**
	政府貨品及服務 BOP6 - SL - Memo item: Government goods and services n.i.e.	World		33,701	34,013	35,64

b. WTO I-TIP Database

WTO 整合貿易商情入口資料庫(the Integrated Trade Intelligence Portal, I-TIP)，網址 http://i-tip.wto.org/services/default.aspx，此資料庫包括查詢 WTO 會員在服務貿易協定(GATS)下的承諾、區域經濟協定(RTA)下的承諾、提供有關影響外國服務提供者市場

進入和運營條件的措施(Applied Regimes)、服務貿易統計(Statistics)及綜合上述訊息的匯報(Report)等 5 大項。

此資料庫的服務貿易統計與WTO- UNCTAD-ITC服務貿易統計的最大區別在於行業別的分類是採用 WTO 120 服務業分類文件方式進行，與 GATS 承諾表之服務業分類一致，包括:1)商業服務業(Business Services); 2)通訊服務業(Communication Services); 3)營造業及相關工程服務業 (Construction & related engineering services); 4)配銷業(Distribution Services); 5)教育服務業(Educational Services); 6)環境服務業(Environmental Services); 7)金融服務業(Financial Services); 8)健康相關及社會服務業(Health related and Social Services); 9)觀光及旅行相關服務業(Tourism and Travel related Services); 10)娛樂文化及運動服務業(Recreational, Cultural and Sporting Services); 11)交通運輸服務業(Transport Services)等 11 項分類。

c. 其他服務貿易實驗性資料-Trade in Services data by mode of supply

此資料庫係依據服務供給模式而進行分類，由 WTO 執行，歐盟出資，預計於 2019 年公布，涵蓋的年份 2005 年至 2017 年，內容包括 70 項國際收支平衡服務分類(EBOPS) 及外國子公司統計(Foreign Affiliates statistics, FAT)14 項級別。

以 2014 年為例，4 種模式的服務貿易占比約為模式一跨境提供 27%，模式二國外消費 15%，模式三商業據點呈現 53%，模式四自然人呈現 5%。

(2) OECD-WTO 平衡版國際服務貿易統計資料庫(Balanced Trade in Services Database, BaTIS)

服務業創造的就業人口及產值佔國內生產毛額(GDP)的比重在多數
國家均有很高的比例(約 50%~70%)，隨著資通訊產業的發展及全球
價值鏈(GVC)的出現，服務貿易變得越來越重要，因為交易物已逐漸
由實體商品轉化為服務，強調的不是製造的商品，而是做出的服務。
但是傳統貿易統計卻無法反映這些變化。

由於服務是無形且多變化，目前各國服務貿易統計數據來源和彙編
方法差別很大，最佳做法是結合使用各種商業調查（針對企業提供
的服務）、旅行/旅遊調查、估算（針對某些金融服務）、運輸調查（主
要運輸服務業提供商）、行政數據（例如增值稅登記冊）和對手國統
計來源等進行綜合彙編，但這些方法仍取決於國內資料來源的可用
性，以及用於統計目的的法源依據。此外，參考他國統計也經常發
生資訊不對稱的情形。

為解決數據缺失及不對稱問題，OECD 及 WTO 合作編製平衡版的
國際服務貿易統計資料庫(Balanced Trade in Services Database)，簡稱
BaTIS ， 網 址 ： http://www.oecd.org/trade/its/balanced-trade-in-
services.htm 該資料庫建構在各國統計機構及國際組織合作的基礎
上，使每個機構對整個系統的不同組成皆有貢獻。其資料涵蓋 1995
年至 2012 年，全球 190 個經濟體。該資料庫服務業分類係依據 2002
年國際收支服務分類法（EBOPS 2002），主要特徵是高度透明化，在
平衡表中的每個數據點都可以追溯到原始來源和所做的精確計算；
及獨立模組化，建構平衡交易數據庫的每一步都可以看作是一個單
獨的模組，如果有新的見解，方法或數據可以單獨更新。

(3) OECD 附加價值貿易 TiVA(Trade in Value Added)統計

跨國企業的運作，增加國際生產的分割，產品零件可能分由不同國
家生產，最後再送到某一國組裝，這樣的現象使得中間產品的貿易

量大增，不僅帶動了相關服務供應商的增加，也促成了服務貿易需求的增長，但是傳統貿易統計數據並未反映出這一點。

圖一 全球價值供應鏈圖示
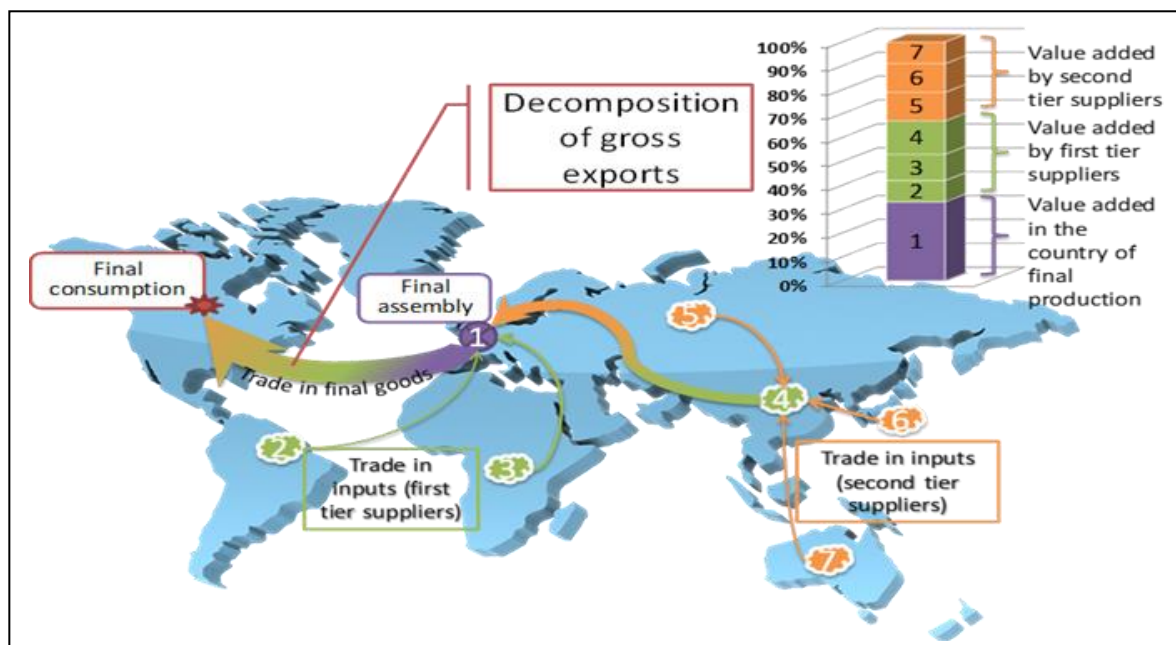
說明:5、6、7 原料加工地送至 4 生產為中間產品後，再送至 1 與 2 及 3 之中間產品合併組裝為最終產品，銷往最終消費地。

由於傳統貿易統計不能反映出新興經濟體參與全球價值鏈(GVC)在就業及技能的提升，容易造成誤導性的觀念，產生評估風險，使政府做出不完善的政策，如針對錯誤的部門進行出口成長策略，影響整體競爭力，或是錯估雙邊貿易形勢，形成保護主義政策，可能損害自身國內上游產業和競爭力。

因此 OECD 及 WTO 合作彙編附加價值貿易 Trade in Value Added 統計資料庫，簡稱 TiVA，網址: http://oe.cd/tiva，該資料庫包括 64 個經濟體 36 項行業別 ，資料期間自 2005 年至 2015 年。TiVA 統計旨在透過深入了解每個經濟體和行業在全球貨品貿易和服務貿易下所創造的附加價值，進而瞭解全球化的運作過程。TiVA 統計利用跨經濟投入產出表 Inter-Economy Input-Output Table (ICIO)，網址

http://oe.cd/icio，追踪跨行業的投入和產出關係，其服務業分類採用 ISIC 第 4 版為分類依據。

(4) 比較目前 WTO 及 OECD 現有服務貿易統計資料庫，如下表:

資料庫名稱/比較項目	WTO- UNCTAD-ITC Trade in Services Datasets	WTO I-TIP Database	OECD-WTO BaTIS	OECD-WTO TiVA
資料期間	2005-2017	1995-2013.01	1995-2012	2005-2015
服務業分類法	EBOPS 2010	WTO120	EBOPS 2002	ISIC Rev.4
經濟體	249	165	190	64
行業別	12	11	11	36
是否納入我國統計數據	有納入	有納入	有納入	有納入
特點	彙編各國提報之服務貿易統計資料	以查詢會員在 GATS 承諾為主，統計之分類與 WTO120 文件一致。	解決數據缺失及不對稱問題，具高度透明化。	了解每個經濟體和行業在全球貨品貿易和服務貿易下所創造的附加價值。

4. **APEC 經濟體案例分析分享**：邀請澳洲、印尼及秘魯政策專家分別就觀光服務業(以教育為目的)、資料開放及電信法規及資料透明化分享使用資料改變政策的經驗。由美國發展貿易顧問團主任 Dr. Ben Shepherd 擔任主持人，澳洲對外事務及貿易部一等經濟秘書 Ms. Jenni McEwin、印尼電信監管機構委員 Dr. Taufik Hasan、秘魯電信法規監管機構副理 Mr. Marco Vilchez 等 3 位專家與談。會議重點如下:

(1) 教育服務業數據促成澳洲國際教育國家戰略政策

講者: 澳洲對外事務及貿易部一等經濟秘書 Ms. Jenni McEwin

講者說明澳洲國際教育出口對經濟的貢獻是非常顯著地。2016 年澳洲教育是全球第 3 大提供者，僅次於美國和英國。依據澳洲統計局（ABS）

2016 年數據顯示，國際教育(教育服務業)出口值高達 218 億美元，較上年成長 17%，已是澳洲第三大出口產品。同時，超過 70 萬國際學生在澳洲消費，估計直接或間接創造了約 13 萬的就業機會，尤其高等教育畢業生，後續以技術移民方式留在澳洲工作，使得澳洲高等教育的勞動比例增加了 3%。

澳洲政府於 2016 年發布了 2025 年國際教育國家戰略政策（National Strategy for International Education 2025）[4]確認了國際教育 (教育服務業)出口的重要性足以影響澳洲未來的經濟繁榮。因此在該戰略政策中，澳洲政府強調要保持澳洲教育機構品質，以吸引國際學生赴澳讀書，並特別開放高等教育留學生畢業後在澳洲就業之機會，以繼續保持教育服務業的增長。該政策還提到國際教育軟實力的重要性，透過學生和研究員的雙向交流計畫，一方面將澳洲的教育價值擴及其他國家，另一方面為推動未來專業人士資格相互認許鋪路，進一步推動全球勞動力流動。

2017 年澳洲觀光服務業出口為 417 億美元，其中以教育為目的出口服務高達約 232 億美元，創歷史新高。由上可知，澳洲制定有關國際教育的國家戰略政策是走在正確的道路。

(2) 資料流通法規支持數位經濟發展

講者:印尼電信法規機構 TAUFIK HASAN 博士

2017 年當全世界電商平均成長率為 14%且亞洲電商成長率 28%時，印尼電商將是全球成長最快的國家之一，高達 78%。印尼政府預估數位經濟的成長將快過實體經濟成長，印尼政府依據世界銀行統計推估，印尼實體經濟會從 2016 年 8760 億美元成長至 2020 年 1 兆 1940 億美元，

---

[4] 進一步資料請參閱網址 https://nsie.education.gov.au/

年均成長率 8%，但是印尼數位經濟將從 2016 年 650 億美元成長至 2020 年 1440 億美元，年均成長率 22%，屆時印尼將成為東協國家數位經濟規模最大的國家。

印尼政府自 2017 年頒布電商路徑圖總統令，目的在建構數位基礎、數位平台及數位生態系，這是印尼 4.0 國家計畫中，所列 10 項優先計畫之一，不僅創造了印尼開放資料"One Data"，同時也預備了印尼隱私及資料保護法的誕生，預計將於 2019 年實施。

印尼政府過去對資料流通的政策是要求所有資料中心(Data Center)必須在地化，不論資料的類型及資料擁有者，期盼透過在地化要求發展在地產業，沒有明確定義資料的法律主體性，結果對 GDP 產生了負面衝擊，增加了投資及經商的成本，這些衝擊包括某些資料保護機制無法適用全部類型的資料，對低度重要性的資料付出高成本的保護機制，由於不當的保護及管控造成具戰略重要性的資料被誤用，且違反規定無罰則造成投資者怯步。

印尼政府於是針對上述現象大步改革，目前的資料流通政策已改為強調資料如何被使用，而非資料中心在地化，並賦予資料擁有人、資料蒐集人及資料處理人明確的法律規範及定義。依據資料蒐集及處理可能產生的衝擊及風險予以分類，明確部門別主管法規者的地位，並將資料依戰略重要性及風險高低進行分類，避免不需要及高成本的資料管理，雖然原則上資料必須在印尼管理、處理及儲存，但在特定情況下，當資料的管理、處理及保存單位能確保資料保護及利益符合印尼法律及安全執行，則資料可以在印尼以外的地區管理、處理及儲存。新法的實施營造有利電商投資的環境，鼓勵資料保護法規的誕生，促進資料蒐集、處理、儲存及管理的透明化，維護了國民資料的主權性，並增訂違反罰則。印尼法規改革後創造了三贏明確法規主管單位的角色，國民資料主權獲保障，創造有利投資人發展的電商環境。

(3)秘魯電信法規監管機構開放資料促進電信產業競爭

講者: 秘魯電信法規監管機構副理 Mr. Marco Vilchez

秘魯電信法規監管機構(OSIPTEL)是規範相關電信法規及標準的官方機構。鑒於秘魯電信業已完全開放外人投資,目前電信業者多有外資背景包括老牌的西班牙商 Telefonica Movistar、墨西哥商 Claro、智利及美國合資商 Entel 及越南商 Viettel 等,OSIPTEL 的目標是促進電信市場競爭,提升電信服務品質和強化用戶對電信服務要求的能力。

OSIPTEL 持續以高效和及時的方式公布各家電信業者的基本費率、市占率及各項民調,藉此加強用戶知的權利及要求電信業者提升服務品質,使市場在用戶方的參與下,變得更為競爭,改變過去僅由幾家電信業者獨霸的局勢。

近年來數位經濟的發展為電信市場建立了新環境,越來越多電信業者提供的服務融合了 OTT[5]、物聯網、機器學習、大數據管理等,雖然目前實施的政策已被證明是成功的,但未來的重點將是賦予消費者權力,例如告知消費者有使用更好計畫的可能性,建立有關服務品質和消費者使用趨勢等新關鍵績效指標,以保持電信市場的競爭強度。

OSIPTEL 期望透過不斷評估市場的實際狀況,密集使用數據,提供真正訊息,以便未來能發展出可以保持或增加競爭的新政策。Vilchez 副

---

[5] **OTT 服務**是指「over-the-top」服務,通常是指內容或服務建構在網路基礎服務之上從而不需要電信運營商額外的支援。該概念早期特指音訊和影片內容的分發,後來逐漸包含了各種基於網際網路的內容和服務。典型的例子有 Skype、Google Voice、微信、網際網路電視等。

OTT 服務需要通過網際網路作資訊傳送,過往需要申領牌照的行業如電信、電視、電台等媒體,如服務基於網路,在很多國家都不會被規範。但隨著 OTT 服務被廣泛使用,有些國家如中國大陸近年已嚴格規管。https://zh.wikipedia.org/zh-tw/OTT

理結語表示,秘魯透過上述模式持續發展一套良好的監管架構和流程,以確保電信市場的發展不被扭曲,而是處在健康良性的競爭環境。

5. **第1次分組討論:**與會者進行分組討論,分享國內不同業別進行改革之現況及該業別資料的蒐集及使用方式。我國與會者與印尼及菲律賓出席者同組,本小組分享重點如下:

(1) 我國以金融監理沙盒(Digital Sandbox)及金融科技創新園區(Fintech Space)為例,強調政府因看到未來金融創新的重要性,且發現我國現行法規之限制會阻礙金融科技的發展,所以政府進行法規調整,並結合民間力量成立 Fintech 園區,目前園區提供輔導對話及法規諮詢服務,有超過 40 家 Starups 接受輔導,雖然成效尚未顯著,但這是一個金融改革的起點,是結合政府及民間資源及力量促成的政策。從我們的經驗發現,雖然服務貿易資料能反映部分事實,最重要的還是要回歸民間需求,政府在規劃政策的時候不能忘記這點。

(2) 菲律賓表示該國物流業缺乏統計資料,以至政府無法確實掌握物流業的實際規模,進而影響國家規劃基礎設施如交通建設的優先次序,菲律賓正在進行這方面的資料蒐集,需要民間業者的配合參與,也希望參加與物流業相關之統計資訊研討會,以加強能力建構。

(3) 印尼分享蒐集製作模式 3(投資)有關外資關係企業統計(FATS)之困境,包括無連續的統計,缺乏資料,需花費大工程進行普查等,製作 FATS 的目的除了解外國人在本地投資之情形外,亦能分析對當地國經濟的影響,作為國家談判之方向。本案由印尼國家統計辦公室負責,屬中長程計畫,需要政府與民間協力完成。

(4) 小結:本小組討論所涉及的業別雖不盡相同,但都涉及到一個核心概念,就是不論在統計資料的蒐集還是政策的決定,民間團體都扮演重要的角色,一定要將他們的需求、意見及力量資源納入政策規劃

中，本小組推派我國出席人陳秘書進行口頭報告，上述觀點獲在場多數經濟體認同。

6. APEC 服務業小組辦理 APEC Index 之進展：APEC 政策支援小組 (PSU)Andre Wirjo 經濟分析師說明 APEC 服務貿易限制指標(STRI) 及技術小組之進展。會議重點如下:

(1) 背景:2015 年 11 月 APEC 服務業合作架構(APEC Services Cooperation Framework, ASCF)獲領袖採認，2016 年 5 月舉辦 APEC 衡量服務貿易法規環境(能力建構)研討會，2016 年 11 月 APEC 服務業競爭力路徑圖(APEC Services Competitiveness Roadmap, ASCR)獲領袖採認，2017 年 8 月 APEC 衡量服務貿易法規環境下一步工作提案獲採認並執行。

(2) 技術小組的成立及目標: 2018 年 3 月成立技術小組，包括澳洲、智利、中國大陸、香港、日本、韓國、馬來西亞、秘魯、新加坡、美國、越南及我國計 12 個經濟體及國際經濟合作組織(OECD)、世界銀行、政策支援小組(PSU)等共同參與。技術小組由韓國 June Dong Kim 博士擔任主席，技術小組的目標是發展 APEC 指標草案(draft APEC Index)，決定先導計畫實施細節，並由自願經濟體優先參與實施，經修正檢討後確認最終版 APEC 指標並納入所有 APEC 經濟體實施，APEC 指標將成為衡量經濟體服務貿易限制之主要工具，俾了解經濟體改善服務業法規之具體進展。

(3) 技術小組於 2018 年開過 2 次會議，第 1 次會議以發展 APEC 指標進行探索性工作，先了解國際間現有服務業相關指標，並就採用現有指標還是建立新指標、部門別參與是逐步擴散還是全面一步到位、政策領域需改進或增加、評分方式及權重等問題進行意見交流。第 2 次會議討論 APEC 指標之目標，及對 OECD、世界銀行 2008 年及世界

銀行/WTO2016 年所製作之服務貿易限制指標(STRI)進行深度比較，
如下表。

	OECD	世界銀行 2008 年	世界銀行/WTO2016 年
經濟體的涵蓋範圍	44 個經濟體，其中 APEC 經濟體有 11 個(澳洲、加拿大、智利、中國大陸、印尼、日本、韓國、墨西哥、紐西蘭、俄羅斯及美國)涵蓋在內，並預計馬來西亞及泰國將分別於 2018 年及 2019 年完成。	103 個經濟體，其中 APEC 經濟體有 16 個(澳洲、加拿大、智利、中國大陸、印尼、日本、韓國、馬來西亞、墨西哥、紐西蘭、秘魯、菲律賓、俄羅斯、泰國、美國及越南)涵蓋在內。	58 個經濟體，其中 APEC 經濟體 19 個(澳洲、加拿大、智利、中國大陸、香港、印尼、日本、韓國、馬來西亞、墨西哥、紐西蘭、秘魯、菲律賓、俄羅斯、新加坡、我國、泰國、美國及越南)涵蓋在內。
資料庫組成	直接蒐集及分析法律規範。費時 5-6 年決定出措施清單。約 16000 項法律及規範，並維持更新。	非 OECD 經濟體:由當地律師事務所完成問卷。 OECD 經濟體:採用公開可取得資料如 WTO 貿易政策檢視、國際貨幣基金年報等。	加強措施分類與 OECD 使用之分類維持一致性。對非 OECD 經濟體由當地律師事務所完成問卷。 OECD 經濟體則採用 OECD STRI 資料庫。
指標建構	每 2 年評分一次。 評分由 0 至 1，0 表示開放無限制，1 表示限制最多。 考慮市場結構和監管制度的變化設立不同的評分系統。	評分分為 0、25、50、75、100 分。 每個部門的總限制會考慮主要限制，並避免重複計算。	評分分為 0、0.125、0.25、0.50、0.75、1 分。 每個部門的總限制會考慮主要限制，並避免重複計算。
部門別權重分配	每項業別由 30-50 位專家審議，決定各業別 5 大政策領域(外資進入限制、自然人移動限制、其他歧視性措施、競爭力障礙、法規透明化)之權重。	各業別經與該業別民間代表及法規制定者諮詢後訂定權重。	各業別經與該業別民間代表及法規制定者諮詢後訂定權重。
最惠國待遇及	有反映經濟體一般最惠國待遇及優惠政策機制。	有反映經濟體一般最惠國待遇，惟優惠政策機制反映有限。	有反映經濟體一般最惠國待遇及優惠政策機制。

優 惠 政策			但是,目前對 APEC 經濟體具體政策措施的資訊範圍不一致。
資 料 庫 更 新 情 況	自 2014 年起,每年定期更新。	2008 年之後尚未更新。	2016 年是最近一次更新,目前尚無定期更新之規劃。

(4) 2018 年第 2 次技術小組會議結果:經濟體雖在基礎指標及政策領域的選定沒有達成共識,但在執行方式從少數業別開始逐漸擴大到全部業別,各經濟體需在 2018 年 10 月底前提供優先業別及參與先導計畫[6]之意願。預計基礎指標的選定可能於 2019 年第 3 次技術小組會議完成,並於 2019 年實施先導計畫。

(5)講者另以 APEC 服務業競爭力路徑圖第 8 項有關推動教育合作及第 12 項推動觀光策略工作行動計劃為例,政策支援小組(PSU)以 APEC 經濟體在 APEC 區域內洽簽教育標準及職業認許方面相互認許協議(MRA)的數量來衡量各經濟體推動教育合作的情形,其中以澳洲洽簽 17 個 MRA 最高,智利僅 2 個 MRA 最少,我國[7]、日本及秘魯皆僅有 3 個 MRA;另外,在推動觀光策略工作上,PSU 以各經濟體人民出國赴 APEC 區域需申請的電子簽證(eVisa)及實體簽證數量來衡量各國推動觀光策略工作之成效,其中加拿大及美國人民在 APEC 經濟體旅行所需辦理的簽證最少(分別為電子簽證 2 國、實體簽證 3 國),中國大陸人民在 APEC 區域旅行所需辦理的簽證數量最多(電子簽證 3 國、實體簽證 14 國),日韓人民則需辦理 5 國簽證(電子簽證 4 國、實體簽證 1 國),我國人民雖與菲律賓人民一樣須辦理 12 國簽證,但

---

[6]先導計畫是讓 APEC 尚未有服務貿易限制指標(STRI)的國家預先實施。
[7]我國對外簽署之 MRA 以電腦、資訊科技教育等認證為主。

我國電子簽證達 9 國實體簽證 3 國，仍較菲國人民(電子簽證 2 國、實體簽證 10 國)便利。

7. 衡量服務貿易法規環境指標：由 OECD 貿易政策分析師 Mr. Janos Ferencz 介紹 OECD 服務貿易限制指標(STRI)，包括建立 STRI 目的，以及 STRI 方法論。會議重點如下:

(1)服務業佔 GDP 的比重，在高收入已開發國家比重高約 72~74%，在低收入低度開發國家比重低約 47%，過去 10 年來變化差異不大。但是在 APEC 區域服務業佔 GDP 的比重呈上升狀態，從 2007 年 50% 成長到 2017 年 60%。

(2)OECD 建立 STRI 指標之目的包括:

a.找出服務貿易的障礙並將障礙分類;

b.為出口商提供有用即時的工具;

c.對改革造成經濟及社會之影響進行分析;

d.協助政府決策官員做出最好的政策。

(3)OECD STRI 資料庫發佈於 2014 年，蒐集 44 個經濟體 22 項業別，計達蒐集 16,000 多項法律及規範，每年約 88,000 件觀察評估，目前資料庫涵蓋 2014 年至 2017 年資料，並每年定期更新，2018 年資料預計於 2019 年 1 月更新。STRI 指標介於 0 至 1，越接近 0 表示越開放，越接近 1 表示限制越高。目前業別範圍包括 1) accounting 會計; 2) architecture 建築; 3) engineering 工程; 4) legal 法律; 5) motion pictures 動作照片/電影; 6) broadcasting 廣播; 7) sound recording 錄音; 8) telecom 電信; 9) air transport 空運; 10) maritime transport 海運; 11) road freight transport 公路貨運; 12) rail freight transport 鐵路貨運; 13) courier 信差/快遞; 14) distribution 配銷; 15) commercial banking 商業

銀行; 16) insurance 保險; 17) computer 電腦; 18) construction 營造; 19) logistics-cargo handling 物流-貨物裝卸；20) logistics-storage and warehouse 物流-倉儲; 21) logistics-freight forwarding 物流-貨運代理; 22) logistics-customs brokerage.物流-報關行等 22 項。

(4) OECD 考慮市場結構和監管制度的變化設立不同的評分系統。每項業別從外資進入限制、自然人移動限制、其他歧視性措施、競爭力障礙、法規透明化等 5 大政策領域去檢視，每項政策領域之權重由 30-50 位專家審議後而訂定。上述指標有反映經濟體一般最惠國待遇及優惠政策機制。

8. 改善法規透明化及促進政策改革：接續上場次，OECD 貿易政策分析師 Mr. Janos Ferencz 續說明學習利用 OECD STRI 線上工具改善法規透明化，以檢視政策變化對指數的影響。會議重點如下：

(1) F 分析師說明從 OECD STRI 發現下列重要事項：

a.服務貿易障礙會阻礙服務業出口；

b.貿易限制造成的成本將由消費者及企業買單；

c.法規合作能減少貿易成本；

d.服務貿易十分依賴專業人士移動提供服務；

e.服務貿易是支撐數位經濟發展的要素之一；

f.服務業的改革能造就中小企業的成長；

(2) F 分析師說明 OECD STRI 線上工具包括各國比較、政策模擬、法規資料庫，同時 STRI 已列入 OECD 統計資料庫內，目前也有專屬 OECD

STRI 手機版 APP，F 分析師向與會者解說各資料庫的使用方式並帶領與會者實際操作，摘要如下：

a. 各國 STRI 比較(Compare your country): 網址 http://oe.cd/stri-cyc，以全球地圖為底，有製作 STRI 的國家上有圓點，點出圓點後會出現該國 22 項業別的 STRI 指標。

b. 政策模擬(Policy simulator):網址 http://sim.oecd.org，這套系統可查詢國別及業別，並依據外資進入限制、自然人移動限制、其他歧視性措施、競爭力障礙、法規透明化等五大政策領域的提問給予評分，讓使用者輕易了解某國某項業別是否開放的提問及細部評分狀況。

c. 法規資料庫(Regulatory database):網址 http://oe.cd/stri-db，這套系統可查詢國別、業別及限制措施之法源依據，法源依據有連結，可看到該法的原文資料。

d. OECD STRI 已納入 OECD 統計系統(STAT):網址 http://oe.cd/stri-stat，使用者亦可透過該統計系統查詢 STRI。

e. 專屬 OECD STRI 手機版 APP 亦可在 Apple's App 商店及 Google Play 商店下載。

9. 分組討論:與會者進行分組演練，實際操作資料庫，並得出所需之分析資料。本小組討論重點如下:

(1) 我國與會者與印尼及菲律賓出席者同組，由於我國及菲律賓尚無 STRI 指標，因此選定印尼及日本的物流報關服務業作比較及討論。

表三 2017 年印尼及日本物流報關服務業 STRI 之比較表

經濟體	印尼		日本	
項目	評分	指數	評分	指數
外資進入限制	5	0.074	2	0.03
自然人移動限制	6	0.05	3	0.025

其他歧視性措施	3	0.03	1	0.01
競爭力障礙	0	0	0	0
法規透明化	8	0.105	7	0.092
總計	22	0.259	13	0.156

(2) 經討論發現印尼的評分及指數皆較日本為高，代表印尼的限制措施較多，例如在外資進入限制部分，印尼要求報關行的經理人需有印尼國籍及對外國人在土地及房產取得和使用上設限等，這些條件在日本均為開放，此外，在自然人移動限制方面，印尼對跨國企業員工、履約人士及獨立專業人士均設限，且停留時間最多介於 12 至 36 個月；反觀日本僅對跨國企業員工及履約人士設限，對獨立專業人士是開放，上述三類人員均可在日本停留超過 36 個月，因此總體而言，日本的物流報關服務業較印尼相同行業為開放。

(3) 此外，本小組假設印尼改變政策，開放上述現有措施後，整體數值產生變化，開放措施越多，指數調降幅度越大。經由本次演練過程，與會者充分了解政策改變對 STRI 數值的影響，進而激發大家思考為什麼當初要設這些限制？設限是否真的有保護到國內行業還是阻礙了該行業的發展？為什麼別的經濟體沒有這些限制該行業一樣能發展得好等等一連串思考。

陸、 綜合觀察及建議

一、 本次會議第一天主要討論服務貿易統計資料，第二天討論服務貿易限制指標(STRI)。美國舉辦的真正目的是希望 APEC 經濟體了解 OECD 的服務貿易統計及服務貿易限制指標，進而直接採用這套制度在 APEC 區域內應用，而不是再創一套指標，美方在標題方面只列 APEC STRI 而不用 APEC Index，即可反映其心態。此外，美國與中國大陸在發展 APEC TiVA 已有共同提案及共識就是引用 OECD TiVA 為主要參考標的，但在發展 APEC 服務貿易限制指標(STRI)方面，美國大力推薦 OECD STRI，陸方迄今尚未表態，

兩造可說尚未有共識，主因係中國大陸及香港皆認為 APEC Index 不應該是 OECD STRI 的擴大，應該依據 APEC 經濟體情況有所調整，此分歧立場能否於 2019 年 2 月的 APEC Index 技術專家小組會議達成共識，仍有待觀察。

二、 鑒於 OECD TiVA 已有納入我國相關統計，但是 OECD STRI 我國尚未建立任何相關指標，經查 OECD 將陸續於 2018 年及 2019 年完成馬來西亞及泰國之 STRI 研究，我國出席人員向 OECD 分析師 Ferencz 詢問，OECD 選擇經濟體進行 STRI 研究的決策程序為何?馬來西亞及泰國是否有負擔經費? F 分析師表示，通常係經濟體先向 OECD 表達有進行 STRI 研究之意願，OECD 經內部會議通過後再安排研究時程，如果我方有意願請 OECD 進行 STRI 研究宜正式遞函表達意願，至於費用分攤可由兩造續談，就 F 分析師了解，馬來西亞及泰國皆有負擔部分費用。本案程序可供日後我國辦理 STRI 作為參考。

三、 本次活動與印尼服務業談判代表 Silvi Sumanti 互動良好，伊表示 2019 年印尼有意舉辦有關建立模式 3 投資統計資料之研討會，擬爭取我方支持，會後印方來電郵請我方就該研討會之概念文件提供意見，我方經洽國內相關單位意見後，已於日前同意連署該案，促成我國與印尼在 APEC 服務業小組合作。

四、 本次活動計有 12 個經濟體出席，9 個經濟體未派員出席。APEC 有關服務貿易統計之能力建構活動，每年會舉辦至少 1 次，如印尼已提案於 2019 年辦理模式 3 投資統計研討會，建議我國應持續派員出席，並鼓勵其他部會同仁參與，除能透過討論交流了解其他國家對某些議題的看法及立場外，亦對同仁的專業知識與能力建構培養有助益。

柒、 附件

上課證書

Agenda

APEC Capacity Building Workshop on Information Gathering Techniques for Assessing the Services Environment

5 – 6 November 2018
The Peninsula Hotel
Manila, Philippines

DAY ONE	5 November 2018
8.30 – 9.00 am	**Registration and Arrival**
9.00 – 9.20 am	**Welcome Remarks** **Ms. Stephanie Moniot**, Economic Officer, U.S. Embassy in the Philippines
9.20 – 9.45 am	**Workshop Objectives and Participant Introductions** **Mr. Alex Ginn,** Associate, US-APEC Technical Assistance to Advance Regional Integration (US-ATAARI) Project, Nathan Associates
Session I 9.45 – 11.00 am	**Why Do Services Matter?** *This panel discussion will focus on the importance of services trade in the global economy. Discussions will cover policy barriers that impede international foreign investment and services exports, and the gains from domestic liberalization and the elimination of barriers to services exports. The panel discussions will also focus on the challenges faced in introducing genuine competition and building regulatory institutions that can effectively support reforms. Examples from specific sectors will be highlighted.* **Dr. Ben Shepherd**, Principal, Developing Trade Consultants **Ms. Justine Lan**, Researcher, World Trade Organization (WTO) *Questions and Answers*
11.00 – 11.30 am	**Coffee Break**
Session 2 11.30 am – 12.00 pm	**Analyzing Trade in Services, Part 1: the Conceptual, Legal, and Statistical** *The session will focus on how services trade is defined and measured, both in the context of trade agreements such as GATS, and by agencies that compile services trade statistics. The discussion will highlight the challenges in measuring services trade and the gaps that exist in matching statistical data to common conceptual and legal definitions of services trade. This context will inform how we define and measure restrictions on services trade.* **Ms, Jessica Mazzone**, Foreign Affairs Officer, U.S. Department of State *Questions and Answers*

12:00 – 1:00 pm	**Lunch**
Session 3 1.00 – 2.15 pm	**Analyzing Trade in Services, Part 2: Addressing the Data Dimension** *The contents of this session will focus primarily on the WTO's database of trade in services as well as the OECD's work in services in TiVA. In particular, this session will highlight how the statistical information can inform trade policy in a number of areas.* Moderator: **Mr. Eduardo Pedrosa**, Secretary General, Pacific Economic Cooperation Council **Dr. Ben Shepherd**, Principal, Developing Trade Consultants **Ms. Justine Lan**, Researcher, World Trade Organization (WTO) **Dr. Fabienne Fortanier**, Head of Trade Statistics Section, Organization for Economic Co-operation and Development (OECD) *Questions and Answers*
Session 4 2.15 – 3.30 pm	**Collating, Analyzing, and Disseminating Data on the International Supply of Services – APEC Economy Perspectives** *Data are fundamental in making a policy argument. Policy experts from APEC economies will provide perspectives on their use of services data, including confronting any data challenges highlighted in earlier sessions.* Moderator: **Dr. Ben Shepherd**, Developing Trade Consultants **Ms. Jenni McEwin**, First Secretary (Economic), Australian Department of Foreign Affairs and Trade, the Philippines **Dr. Taufik Hasan**, Commissioner, Indonesia Telecommunications Regulatory Authority, Indonesia **Mr. Marco Vilchez**, Regulations Sub-Manager, OSIPTEL, Peru *Questions and Answers*
3.30 – 4.00 pm	**Coffee Break**
Session 5 4.00 – 5.20 pm	**Promoting Services Trade Policy Reforms – APEC Examples** *This is an interactive session where participants will be organized into groups to discuss data challenges faced by economies and data collection efforts undertaken. Participants will also reflect on specific challenges faced in introducing genuine competition and, conversely, enablers that support reforms in various sectors.* *Questions and Answers*
5.20 – 5.30 pm	**Wrap Up**

Why Do Services Matter?

Capacity Building Workshop on Information Gathering
Techniques for Assessing the Services Environment

5-6 November 2018

Justine Lan

1

Outline

- **Why do we need an enabling services policy environment?**

- What is the role of data and transparency?

- How can domestic regulation complement liberalization?

- What makes services reform more complex than goods?

- How to keep up with the digital era?

2

- **Why do we need an enabling services policy environment?**

  Trade in services is mostly governed by domestic regulation (behind the border measures)

  Why measures on services can have an expansive effect?

  - Services play an increasingly important role in national economies and international trade

  - Services serve as vital inputs to other sectors

  - Increasing tradability of services can provide opportunities

  - Services are the main destination of FDI

Outline

- Why do we need an enabling services policy environment?
- **What is the role of data and transparency?**
- How can domestic regulation complement liberalization?
- What makes services reform more complex than goods?
- How to keep up with the digital era?

4

- **What is the role of data and transparency?**

  - Opaque rules can create unpredictability, impose unnecessary burdens on businesses, and discourage investment

  - Need a balance between allowing space for the legitimate use of regulations and preventing its abuse as well as minimizing regulatory discretion

  - Lack of information on measures applied in services makes analysis of the impact of reforms and protection difficult

5

Outline

- Why do we need an enabling services policy environment?
- What is the role of data and transparency?
- **How can domestic regulation complement liberalization?**
- What makes services reform more complex than goods?
- How to keep up with the digital era?

6

How can domestic regulation complement liberalization?

- To have a meaningful liberalization, regulatory reform is needed to adapt regulations

- Poorly designed policies, lack of adequate policies or weak enforcement of existing policies can increase the cost of doing trade in services.

What is needed?

- Transparent and predictable regulations

- Effective regulatory institutions e.g. establishing an independent regulatory body and allocating of sufficient resources to effectively regulate and enforce

- Coordination among regulators to craft policies that are conductive to doing businesses while achieving the desired public policy goals

7

Outline

- Why do we need an enabling services policy environment?
- What is the role of data and transparency?
- How can domestic regulation complement liberalization?
- **What makes services reform more complex than goods?**
- How to keep up with the digital era?

8

- **What makes services reform more complex than goods?**

  - Unlike goods, trade in services is not only about Mode 1 — it involves investment and labour mobility

  - Market failure is pervasive in services which drive the incentives for domestic regulations

  - Each services sector has its unique characteristic and requires a tailored approach depending on the nature of the service and the economy-specific realities

9

- **What makes services reform more complex than goods?**

  Policy changes by sector, 2010-2016, APEC

Members	X	1	2	3	4	5	6	7	8	9	10	11	12	TOTAL - Sectors	TOTAL - Policy changes
Australia	5		2			1		2				1		5	11
Brunei Darussalam															
Canada	7	1	5					1				1		5	15
Chile	3	1	2					2						4	8
China	10	7	7	3	9	5		25	4	5	2	10		11	78
Hong Kong, China	1		1					5		1				4	8
Indonesia	3	2	3	1	2	2		3	1	1		4		10	21
Japan	3	5	3					3		1		2		6	17
Korea, Republic of			1					1				1		3	3
Malaysia	1	3			1			10	1	2	2	3		8	17
Mexico	1	1	3					1				2		5	7
New Zealand	1											1		2	2
Papua New Guinea	1													1	1
Peru	2							3						2	5
Philippines	1							6			1			3	8
Russian Federation	9	1	1					2						4	13
Singapore	3	2	1		1			1						5	8
Chinese Taipei	4		2		1	1		2		1		2		7	13
Thailand	2		1					8				1		4	12
United States of America	6		3					2						3	11
Viet Nam	5		2		4	2		3						5	16
	68	23	37	4	18	9		80	6	11	5	28			

Source: I-TIP Database

10

Outline

- Why do we need an enabling services policy environment?
- What is the role of data and transparency?
- How can domestic regulation complement liberalization?
- What makes services reform more complex than goods?
- **How to keep up with the digital era?**

11

- **How to keep up with the digital era?**

E-commerce definition under the Work Programme

"the production, distribution, marketing, sale or delivery of goods and services by electronic means"

"supply of a service" definition under the GATS

"supply of a service" includes the production, distribution, marketing, sale and delivery of a service.

12

• How to keep up with the digital era?

Commercial services exports 2017, APEC

- Manufacturing services on physical inputs owned by others
- Maintenance and repair services
- Transport
- Travel
- Construction
- Insurance and pension
- Financial services
- Changes for the use of IP
- Telecommunications, computer and information
- Other business
- Personal, cultural, recreational

Selected services exports growth in APEC (2010 - 2017)
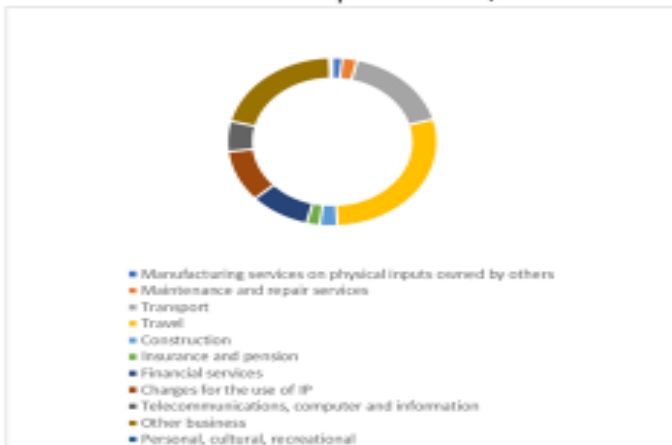
Source: author's illustration based on WTO-ITC-UNCTAD database
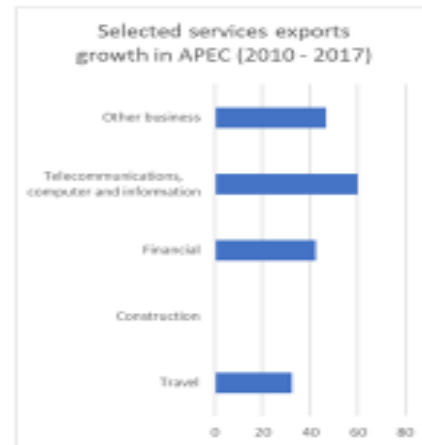
• How to keep up with the digital era?

Policy changes by modes, 2000-2014, World

Source: Roy, M. (2015)

How to keep up with the digital era?

Existing WTO disciplines	Market access	Competition	Trade facilitation	Moratorium
Development	Open Internet	Transfer of data	Data localization	Data protection and privacy
Open government data	Standards and harmonization	Prior authorization	Transparency	Online consumer protection
SPAM	Cybersecurity	E-authentication/ e-signature/ e-contracts	E-payment	Liability and jurisdiction
	Source code/ trade secrets	Technology requirements		

15

How to keep up with the digital era?

Selected applied measures, Internet services, APEC
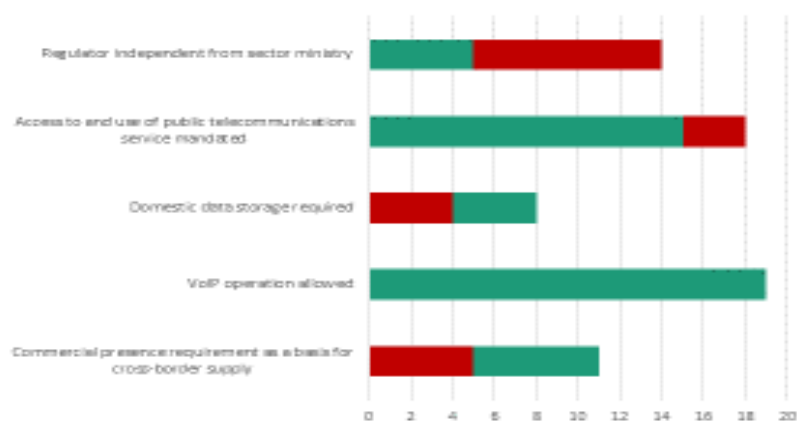
Source: I-TIP database

16

Thank you!

Why do Services Matter?

Dr. Ben Shepherd
Principal, Developing Trade Consultants &
Consultant, US-ATAARI
November 5th, 2018 | Manila, The Philippines

US-APEC Technical Assistance to Advance Regional Integration
(US-ATAARI)

A joint project of the U.S. Agency for International Development, the U.S.
Department of State, and Asia-Pacific Economic Cooperation

Outline

1. Basic facts on services in APEC

2. Reforming services markets for growth

3. Key takeaways

Basic Facts on Services in APEC
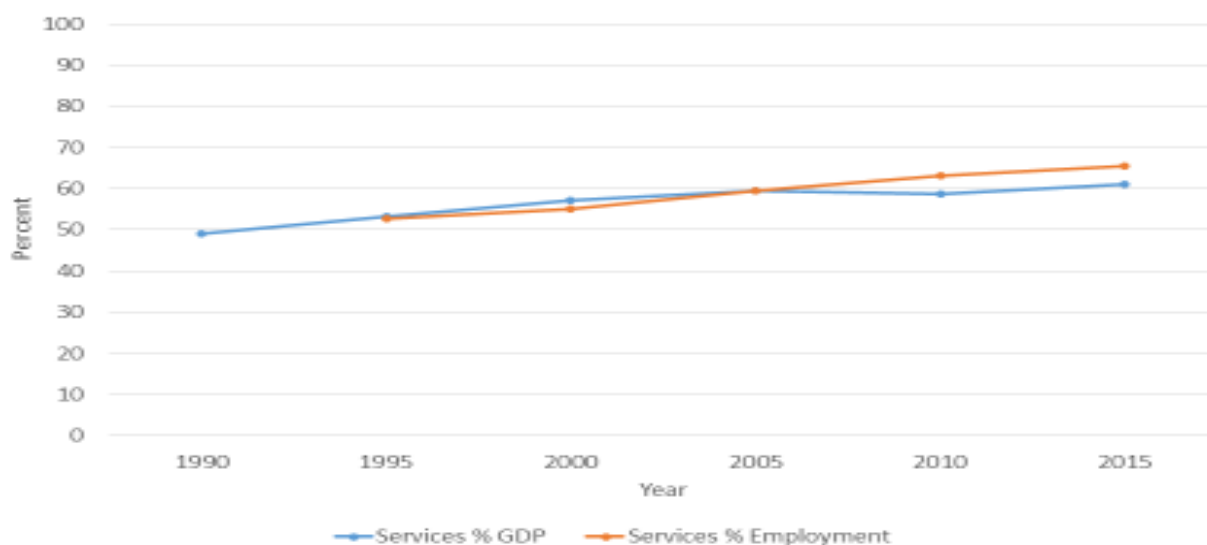
Basic Facts on Services in APEC

Labor Productivity
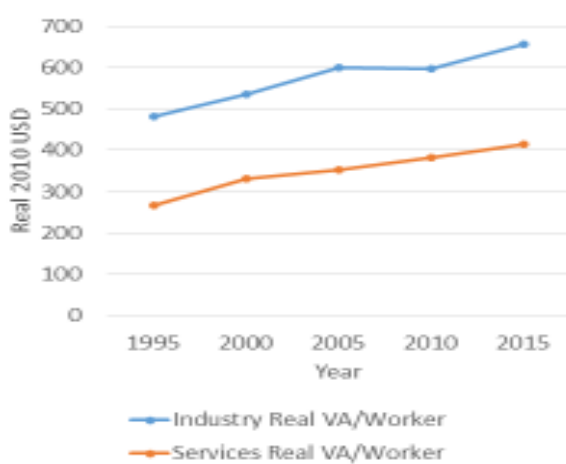
Labor Productivity Growth
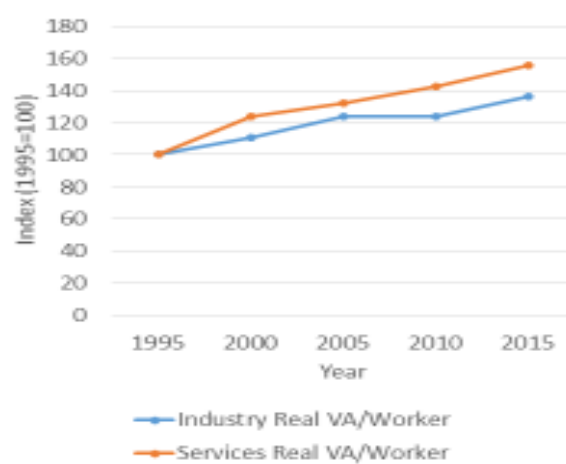
Basic Facts on Services in APEC

Total Exports
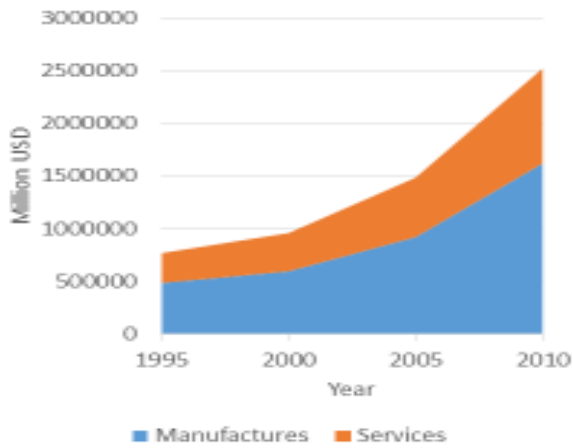
Export Growth
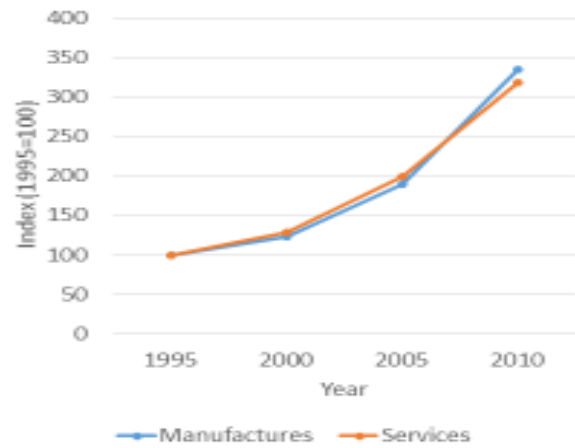
Basic Facts on Services in APEC

Services VA % Total Exports
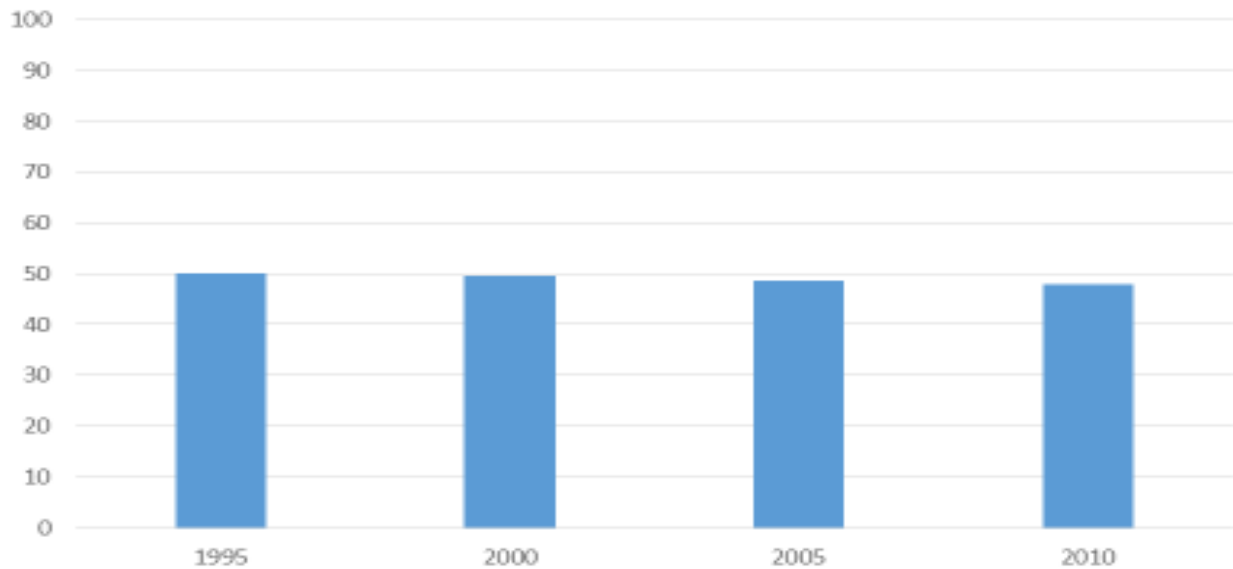
Reforming Services Markets for Growth

- Regulation is a key determinant of service sector performance.
    - Regulation can create entry barriers, which support rents.
    - Alternatively, it can increase the costs of doing business, which is a real resource costs.
- Reform of both types of barriers can bring real gains.
- Economic gains are not only to the services sector itself, but are spread economy wide because services are used so extensively as inputs in other sectors.
    - Gains from reform are particularly large in "backbone" services sectors.

Reforming Services Markets for Growth

- Reforms in key backbone sectors have particular potential to boost GDP.
- Reducing real resource losses from inefficient regulations is like a technological improvement for producers who use those inputs, i.e. it boosts competitiveness.
- PSU's 2015 report estimates that ambitious but realistic structural reforms in transport, energy, and telecommunications (all services) could:
    - Boost APEC real GDP by $175bn annually.
    - Increase productivity by 2%-14%. Impacts above 10% in Indonesia, Malaysia, Mexico, the Philippines, Chinese Taipei, and Viet Nam.

Reforming Services Markets for Growth

Trade Costs
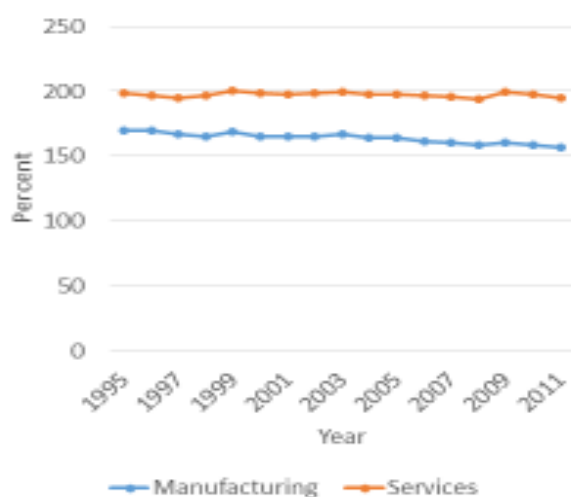
Change in Trade Costs
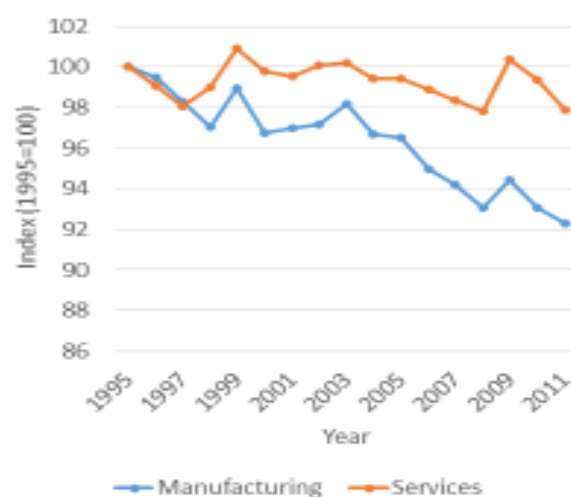
Reforming Services Markets for Growth

- Against the background of research like this, we know that:
  - Services policies are key determinants of sectoral competitiveness
  - Competitiveness in services is a key determinant of the competitiveness of other sectors, especially manufacturing.
  - Trade costs are higher in services than in goods…
  - So the payoffs from reform are likely higher (efficiency gain is proportional to the square of the price wedge)
  - Services reforms also have dynamic, pro-competitive effects that are more difficult to quantify.

47

Key Takeaways

- Boosting services competitiveness is therefore vital for medium to long-term economic performance.

- As economic activity shifts towards services, the sector will only become more important as a source of growth.

- Growth potential of services sectors varies widely, so sectoral policies need to ensure that high potential sectors can access the resources they need to grow.

- In addition to input linkages, sectors like education are directly growth promoting by deepening human capital and supporting R&D that drives technological progress.

Measuring trade in services:
new indicators and remaining challenges

Fabienne Fortanier

Head of Trade Statistics
OECD Statistics and Data Directorate

OECD
BETTER POLICIES FOR BETTER LIVES

Importance of trade in services

- The **services** sector accounts for the majority of GDP and employment in virtually all economies world-wide

- **Trade** in services also becomes increasingly important, reflecting developments in **ICT** and the emergence of **Global Value Chains**, that increasingly emphasize trade in **tasks** (instead of products): it is not what you <u>make</u>, but what you <u>do</u>.

- However: there is often very little additional statistical information available (e.g. regarding the main trading partners, the types of traded services), meaning that important policy questions go unanswered:

    - What are the trends, drivers and effects of trade in services?
    - What main modes of supply are used?
    - What are barriers to services trade and how can our economy position itself in international trade negotiations aimed at reducing these barriers?

Challenges in measuring trade in services (1)

- Services are *intangible*, and very *diverse* in nature
- Unlike for trade in goods (which can rely on data from customs), the *data sources* and *compilation methods* for trade in services statistics vary greatly
  - The current best practice is to use a *combination* of various business surveys (for services provided by businesses), travel/tourism surveys (for travel), estimations (for certain financial services), transport surveys (among largest transport providers), administrative data (e.g. VAT registers) and other sources
  - But this depends on *domestic availability* of these sources and *legal context* with respect to their use for statistical purposes
  - May result in important *trade asymmetries* (the data on exports of economy A to B do not align with the data on imports of economy B from A)

Challenges in measuring trade in services (2)

- But there is no alternative: increasing complexity of services transactions means that the '**traditional**' **data source** (International transaction Reporting System (ITRS)) becomes increasingly **obsolete**
  - Inter-company transactions with netting practices are not properly recorded
  - Possible misclassifications of types of services (by banks on behalf of transactors)
  - Geographical allocation may be biased (economy of settlements versus economy of transactions)
  - Reporting thresholds (increasingly higher in context of capital account liberalization) may affect data accuracy
  - Timing is based on settlement and not accrual (important e.g. for construction, insurance)
  - Certain transactions not captured at all (e.g. FISIM, non-cash transactions)

OECD-WTO Balanced International trade in Services statistics

Motivation for OECD-WTO Balanced Services Trade database

- Develop an international Benchmark Dataset for bilateral trade in services that completes missing data, and resolves asymmetries
- OECD-WTO in close cooperation with economies, and regional organisations
- Used as a stand-alone analytical dataset, and as a key input for all regional and global Trade in Value Added initiatives

Balanced trade statistics: key characteristics and guiding principles

- Transparency: Each data point in the final balanced table can be traced back to both original sources and the exact calculations that were made.

- Modularity: Each step in the construction of a balanced trade database can be seen as an individual modules, which may be updated separately if new or better insights, methods or data become available.

- Collaboration: builds on work with statistical offices as well as with other international organizations, making insightful and visible the contributions of each to different components of the overall system

- Long-term perspective: The project has a long time-horizon. It is iterative and versioned, and is improved and extended incrementally in the years to come.

- Catalyst for improved statistics: Not 'just' an international analytical tool, but a process for increasing data consistency at the national/bilateral level of statistics

7

OECD-WTO Balanced Trade in Services Statistics

Data collection	• Data collection • Data cleaning & preparation
Data estimation	• Additional national data, backcasting, forecasting, interpolations, derivations, integration of EBOPS2010 data, gravity-model based estimates
Trade balancing	• Symmetry-index weighted average
CPA conversion	• Country-specific conversions of EBOPS to CPA using correspondence tables, SUT information and STEC

- OECD-WTO Database: Balanced Trade in Services Database (BaTIS), accompanied with methodological paper, website, and blog article

- Covering 1995-2012, 190 economies/partners and all main EBOPS 2002 items

Results: role of different types of estimates in final bilateral dataset
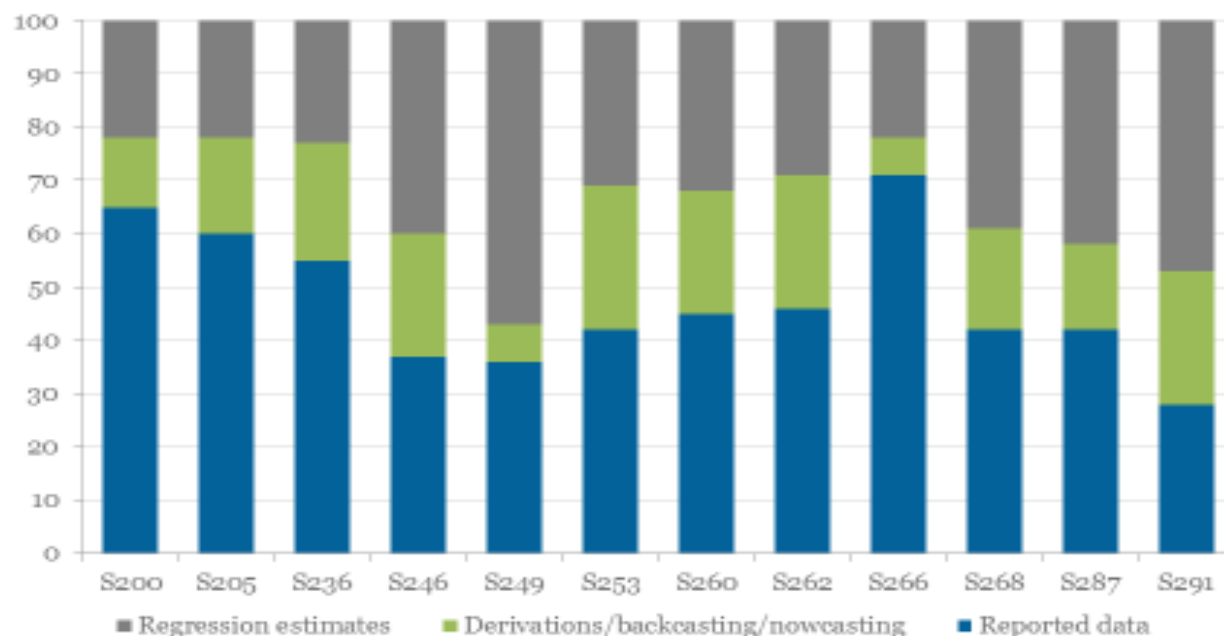
Legend: Regression estimates ■ Derivations/backcasting/nowcasting ■ Reported data

Results: role of different types of estimates in final bilateral dataset (APEC)

Legend: ■ Reported ■ Derivations/backcasting/interpolations ■ Regression estimates
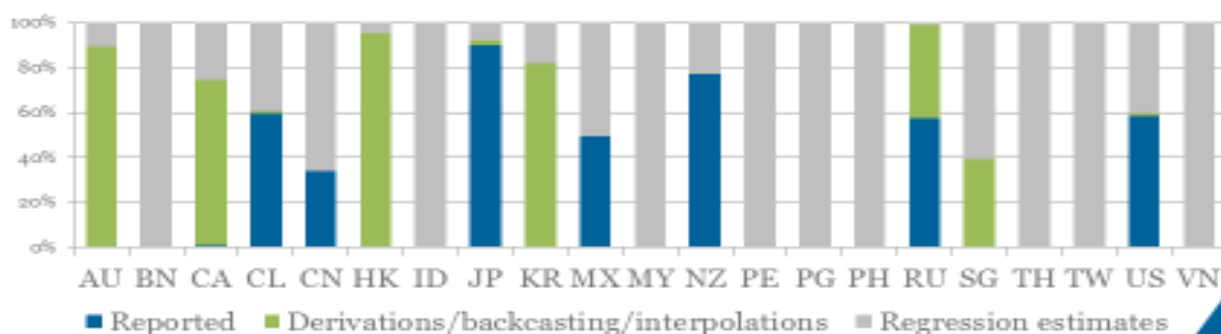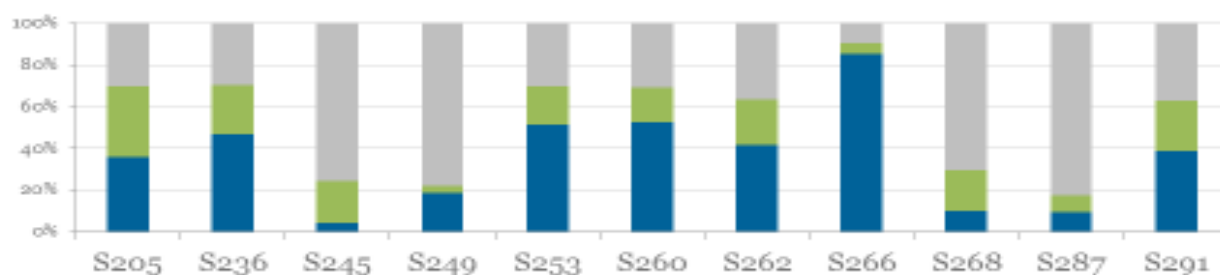
Balanced trade in services statistics: examples of results

Balanced bilateral trade in services trade, US – UK
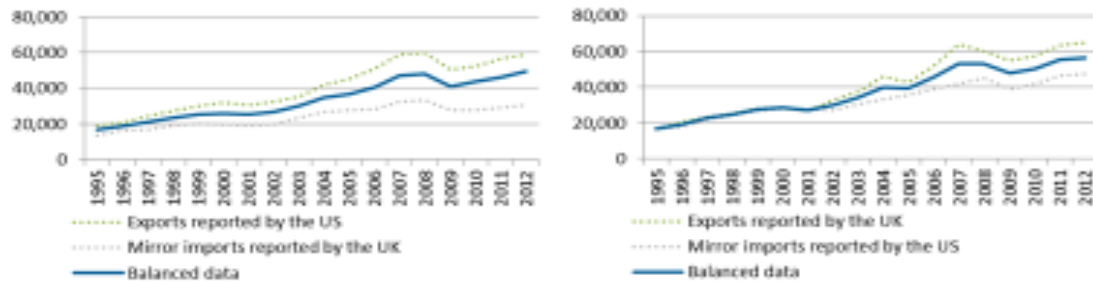
Balanced bilateral trade in services trade, US – China

Balanced trade in services statistics: examples of results

Changes in partner distribution due to reconciliation of trade asymmetries (exports)

Increasing international fragmentation of production

Explosion of trade in intermediates as firms specialise in stages (tasks) of production
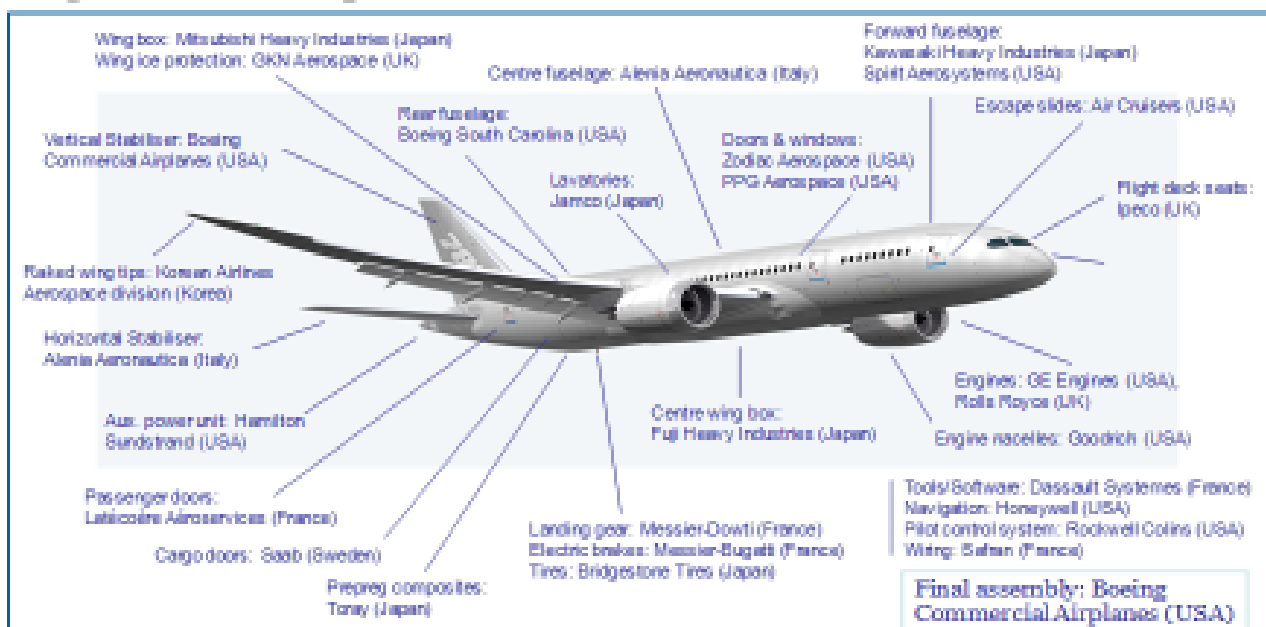
Gross trade flows increasingly embody components (and so value) created elsewhere

14

Increasing international fragmentation of production
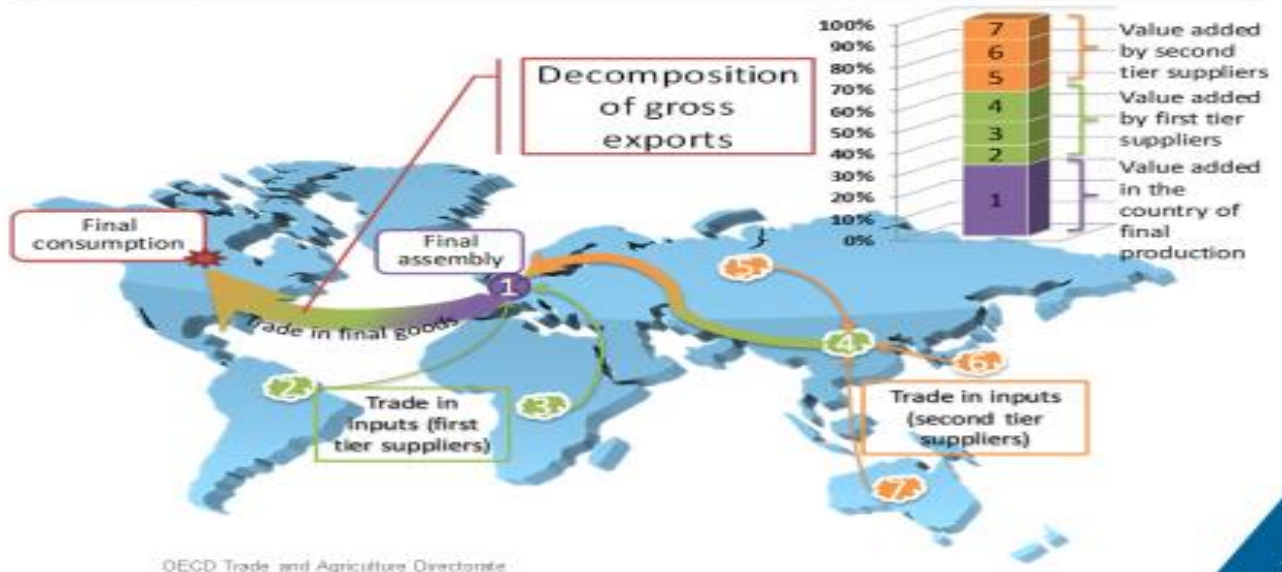
OECD Trade and Agriculture Directorate

But conventional trade statistics do not reflect this…

Gross Trade, % of GDP

■1993 ■2013
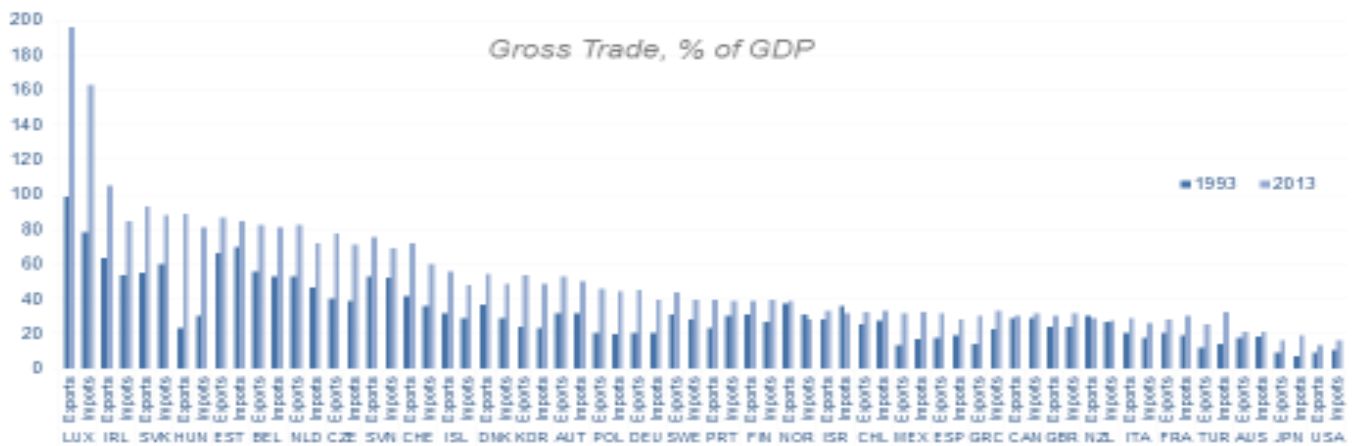
But conventional trade statistics do not reflect this…

…Creating misleading perceptions and imperfect policies:

- Export driven growth strategies may target the wrong sectors (with consequences for competitiveness)
- Bilateral trade positions: Protectionist policies can hurt domestic upstream industries and competitiveness
- Imperfect assessment Systemic risks – impact of macro-economic shocks on supply-chains
- Jobs, skills
- (lack of) integration of emerging economies in GVC

…requiring a new statistical response: TiVA

[in value added terms, there is a direct relationship between A and C]
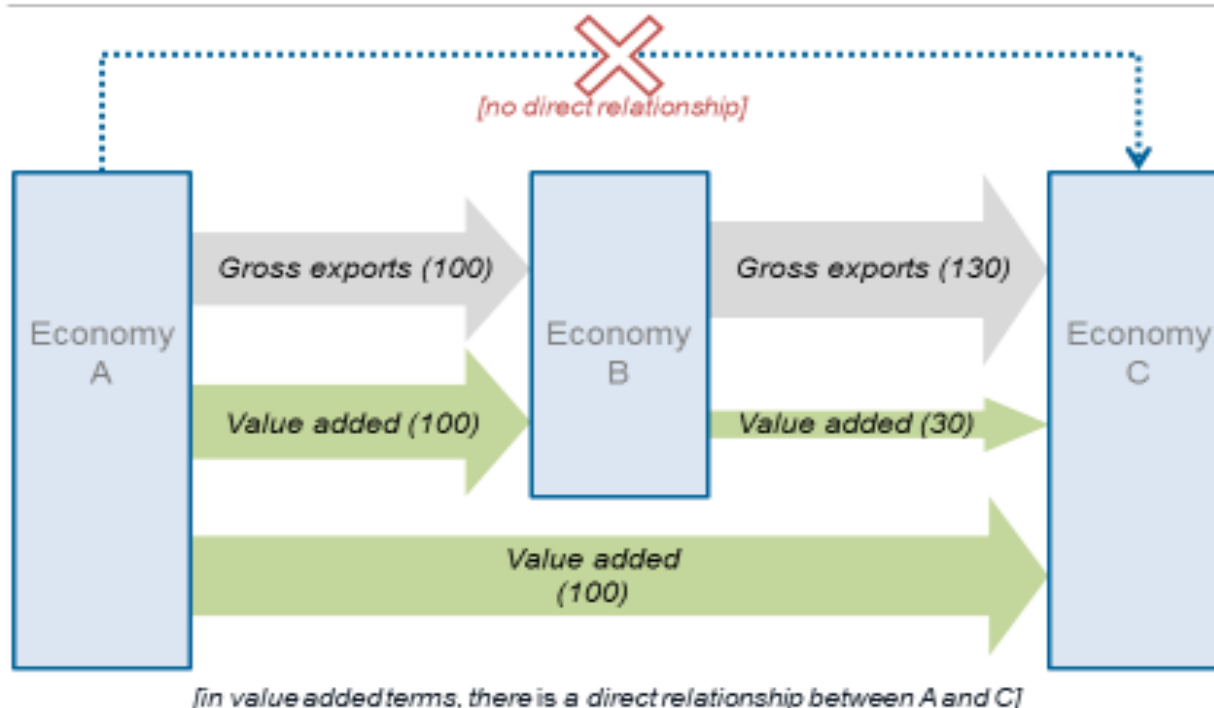
Example – exports by source economy, source industry and final destination
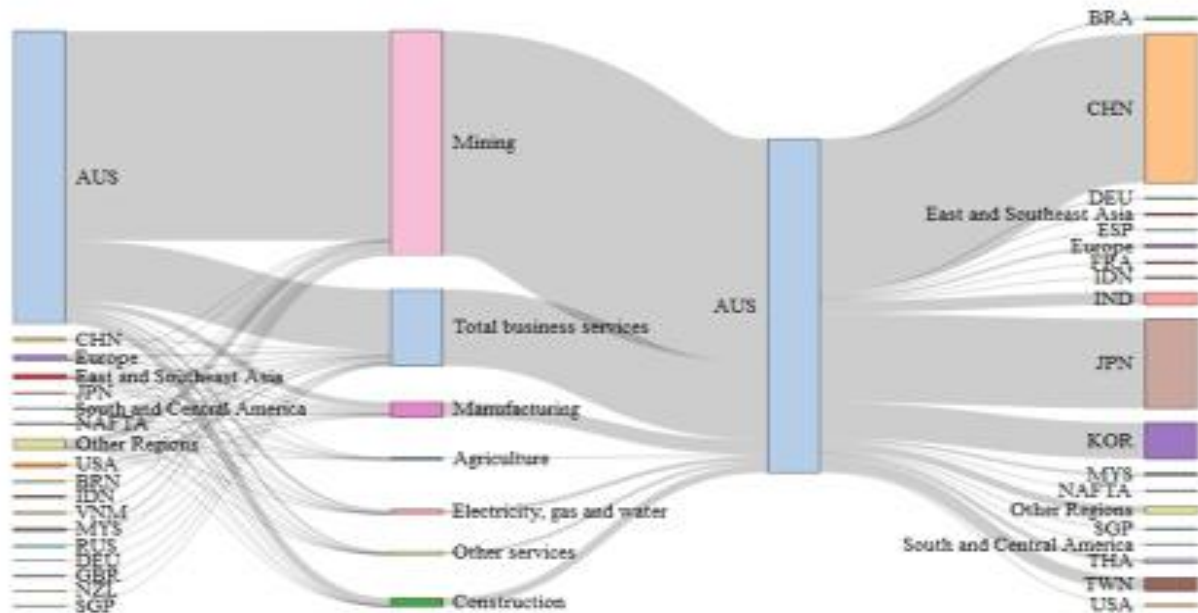
Source: TiVA nowcast (2017)

From a 'gross trade' to a TiVA perspective

- **TiVA** aims to increase our understanding of the process of globalization by providing **insights** into the **value added** created by **each economy and industry** in the **production of goods and services** that are **traded** and **consumed** worldwide
    - How much value added is created by trade – directly *and* indirectly – and where?
    - What is the (indirect) role of services in international trade?
    - What are the risks (in GVCs) and impacts of policy measures
    - How much is our economy/industry dependent upon foreign demand?
- TiVA's work horse: **Inter-Economy Input-Output Table** (ICIO), tracing input-output (GVC) relationships across industries AND economies.

TiVA provides new perspectives: on export intensities…

Exported domestic value added as % of GDP
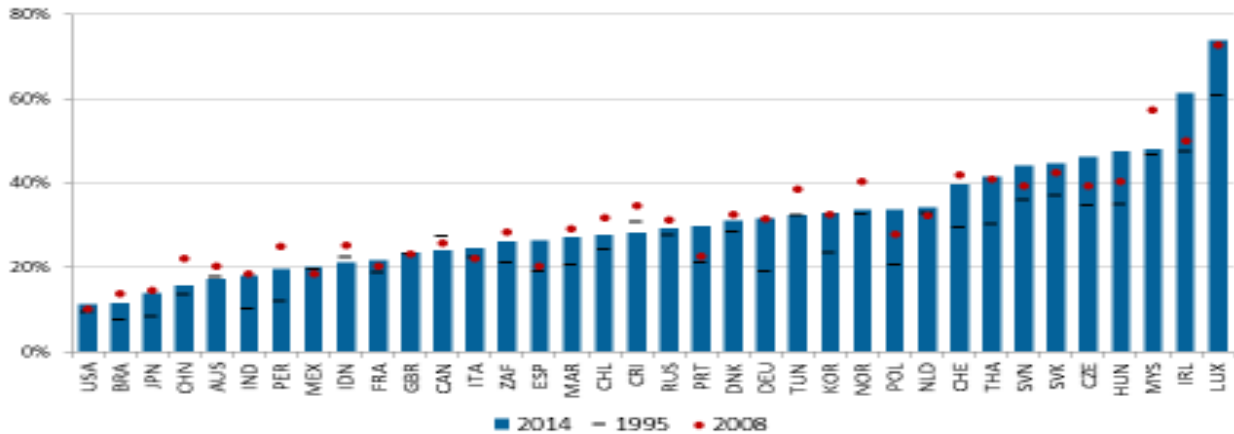
Exports require imports…

Foreign value added as a % of exports, 1995-2014
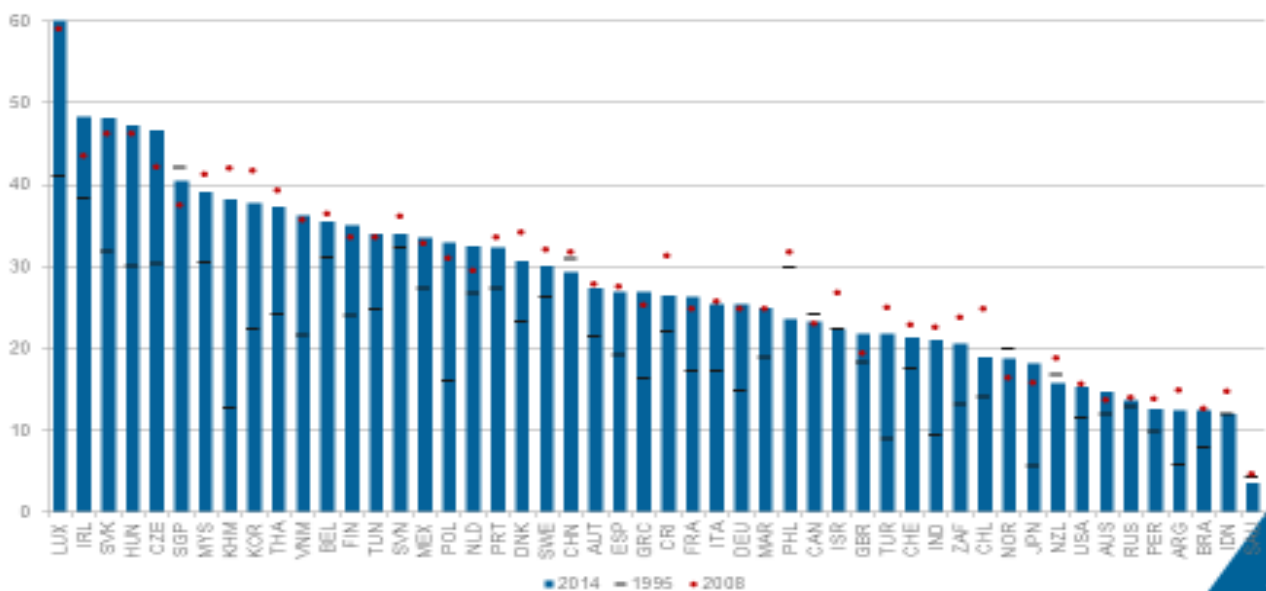
TiVA highlights who trades with who…

Chinese trade surplus with US one third smaller in value added terms

Chinese trade balance in gross and value added terms, 2014

- Gross trade balance
- Value added trade balance
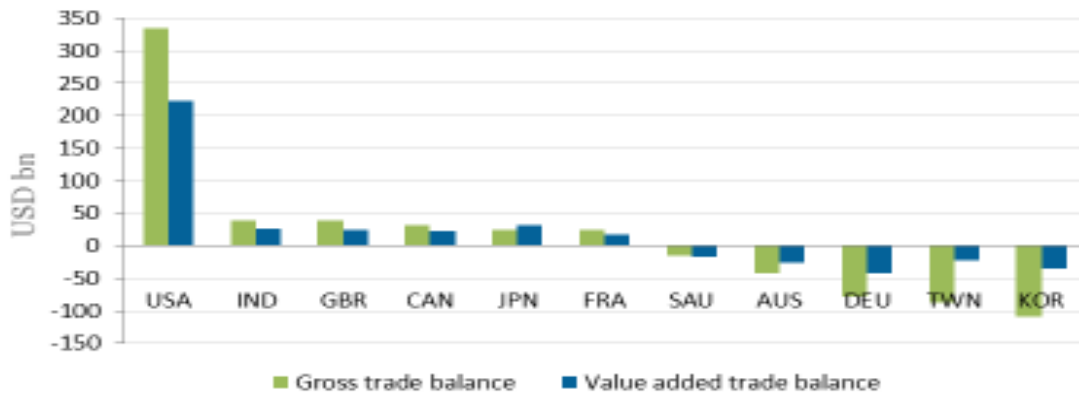
23

…and how upstream services matter

While services account for only 20-25% of gross global trade flows, they account for ~half of exported value added

Services value added as a % of exports, 2014

- Domestic
- Foreign

24

60
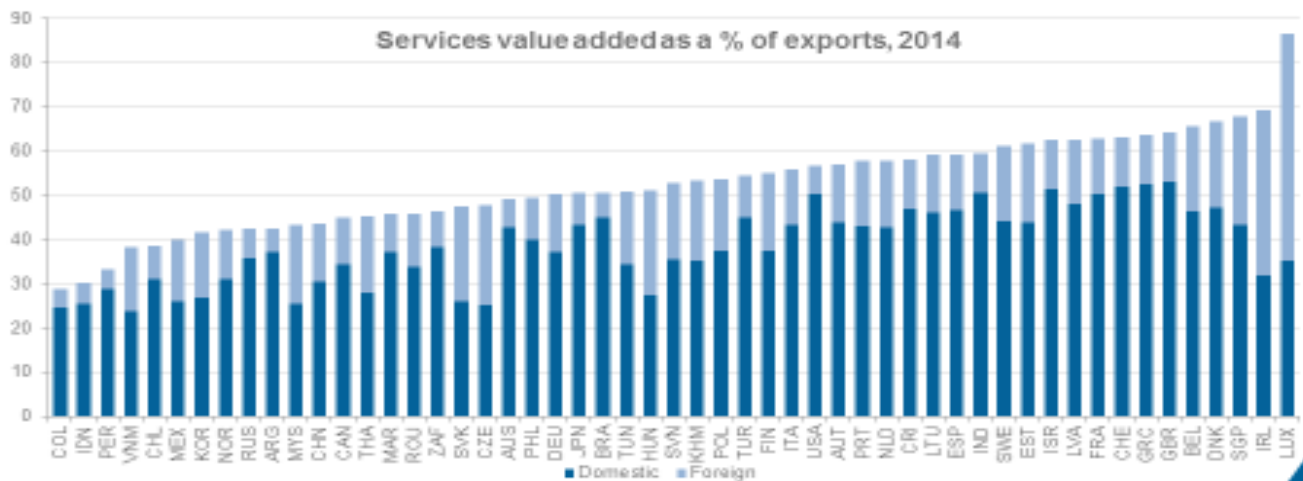
Institutionalising and mainstreaming TiVA

Improving data quality and economy coverage

- Via OECD Working Parties & key partners
- Via individual economy programs (e.g. Peru, Morocco)
- In collaboration with regional organizations (APEC, UN ECA, UN ESCWA, ECLAC, CEFTA, Eurostat, and many others)

Improved statistical foundations

- Start of official OECD collection and continued expansion of national Supply-Use Tables > including non-members!
    - http://stats.oecd.org/Index.aspx?DataSetCode=SNA_TABLE30
- Release of OECD-WTO benchmarked and balanced Trade Statistics, building on economies' bilateral asymmetry meetings
- More timely data: now-casted indicators up to 2014

TiVA: Increasing economy scope and international coherence

- Proliferation of *regional TiVA initiatives* with aim to integrate into OECD-WTO TiVA
    - APEC-TiVA, NAFTA-TiVA, Figaro (EU), ...
    - And many others: WIOD, ECLAC, ECA, ESCWA, ...

- OECD *coordinates* these initiatives via e.g.
    - secondments, bilateral meetings and workshops
    - The creation of a *Steering Group*
    - The development of a joint *Handbook* describing the methodology to develop a *globally recognised, jointly developed, single measure of TiVA* (and international benchmark global SUT and IO table)

Workshop on
Regional-Global TiVA Initiatives
27 March 2017

Beyond TiVA: trade, investment and inclusive globalisation

Development of additional, richer GVC indicators...

- On **SMEs** and **MNEs** in Global Value Chains
- On additional **impact indicators** such as employment; CO_2 emissions; competitiveness, ...

...requires improved coherence in statistical system

- OECD Expert Group on **Extended SUTs**
- Microdata linking
  - OECD-Nordic NSOs collaboration: Nordic Countries in GVCs
  - OECD Handbook on Linking Trade and Business Statistics
- Improved statistics on the Trade-Investment nexus
  - Joint SDD-DAF Trade and Investment Notes by economy
  - Forthcoming OECD database on multinational enterprises (ADIMA)

27

Thank you

For more information please contact

Fabienne.Fortanier@oecd.org

28

Analyzing Trade in Services Part 2

Capacity Building Workshop on Information Gathering Techniques for Assessing the Services Environment

5-6 November 2018

Justine Lan

1

Outline

► **WTO-ITC-UNCTAD Trade in Services datasets**

► WTO I-TIP Database

► Experimental data on trade in services

2

WTO-ITC-UNCTAD Trade in Services datasets

Geneva based TIS datasets most complete and up-to-date

By **detailed service category**
For **all economies, regions, economic groups, world**
New interface in November

Bulk download of trade datasets available!

WTO-ITC-UNCTAD Trade in Services datasets

WTO-ITC-UNCTAD Trade in Services datasets

WTO-ITC-UNCTAD Trade in Services datasets

WTO-ITC-UNCTAD Trade in Services datasets

Short term trade in commercial services

	EXPORTS				
	2017 q2	2017 q3	2017 q4	2018 q1	2018 q2
Transport					
World	7.9	12.9	14.2	14.2	8.4
North America incl. Mexico	9.8	16.1	15.2	7.7	6.9
Europe	7.8	15.1	17.9	18.2	11.8
Asia	5.9	7.1	8.6	12.2	5.6
Travel					
World	6.2	11.3	12.0	15.3	10.9
North America incl. Mexico	4.4	2.8	5.7	6.1	0.8
Europe	8.1	16.6	16.0	23.8	14.7
Asia	4.6	6.0	9.9	15.4	12.6
Goods-related services					
World	5.3	9.4	16.1	13.2	11.9
North America incl. Mexico	5.5	-3.0	7.7	6.8	11.4
Europe	5.8	15.7	18.3	17.7	15.2
Asia	2.4	6.5	9.7	8.6	6.7
Other commercial services					
World	4.9	8.7	11.9	15.5	9.5
North America incl. Mexico	3.6	4.4	7.6	7.6	7.8
Europe	3.4	5.8	15.5	17.6	5.4
Asia	8.9	9.8	12.2	16.8	13.1

Monthly data available for some 30-40 economies

https://www.wto.org/english/res_e/statis_e/tradeserv_stat_e.htm

WTO-ITC-UNCTAD Trade in Services datasets

WTO Publications

US$ 5.19 trillion

34%

53%

Outline

► WTO-ITC-UNCTAD Trade in Services datasets
► **WTO I-TIP Database**
► Experimental data on trade in services

WTO I-TIP

- Growing demand for information on trade in services, in particular on actual regulations and policies (advance national policy reform, inform international negotiations, transparency on applied services policies)

- Prior initiatives at WTO and WB

  - WTO: GATS commitments database, services statistics, RTAs database

  - 2012: WB Services Trade Restrictions Database (STRD)

- **2013: WB-WTO join forces (MoU)**

  Services Integrated Trade Information Portal (I-TIP services)

- 2014: OECD releases STRI and regulatory database

- 2016: Enhanced cooperation with OECD

STATISTICS

Member: **Australia**

W/120 sector: ALL SECTORS

- Hide import/export
  - Hide chart
    Chart type: Column Chart   ☑ Stacked

Trade statistics: Commercial services (Services excl. government services)
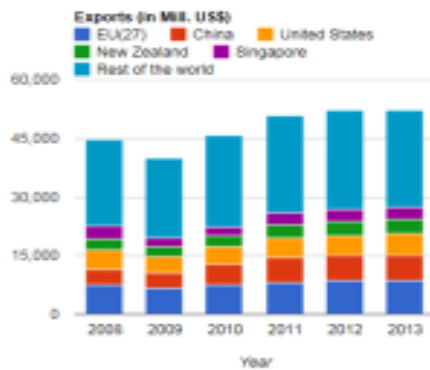
			Value (Mil.US$)			% in total services - 2013	% in world - 2013	Average growth		
	Partner		2011	2012	2013			2005 – 2013	2012	2013
Exports ⓘ										
	Commercial services (Services excl. government services)									
	World		50 848.02	52 300.82	52 247.09	100.0	100.0	7	3	0 ⓘ
	EU(27)		8 108.61	8 512.11	8 621.99	100.0	16.5	5	5	1 ⓘ

REPORTS – COMMITMENTS – MEMBER x SECTOR (GATS)

1	BUSINESS SERVICES
2	COMMUNICATION SERVICES
3	CONSTRUCTION AND RELATED ENGINEERING SERVICES
4	DISTRIBUTION SERVICES
5	EDUCATIONAL SERVICES
6	ENVIRONMENTAL SERVICES
7	FINANCIAL SERVICES
8	HEALTH RELATED AND SOCIAL SERVICES (other than those listed under 1.A.h-j.)
9	TOURISM AND TRAVEL RELATED SERVICES
10	RECREATIONAL, CULTURAL AND SPORTING SERVICES (other than audiovisual services)
11	TRANSPORT SERVICES
12	OTHER SERVICES NOT INCLUDED ELSEWHERE
HC	Horizontal Commitments

GATS Schedules

Members	1	2	3	4	5	6	7	8	9	10	11	12	TOTAL	HC Text
Indonesia	X	X	X				X		X		X		6	View
	1	1	1				1		1		1			

Outline

▶ WTO-ITC-UNCTAD Trade in Services datasets

▶ WTO I-TIP Database

▶ **Experimental data on trade in services**

19

Experimental data on trade in services

OECD-WTO BaTIS

Trade in Services data by mode of supply

Cross-border e-commerce and digital trade

20

Trade in services data by mode of supply

A global dataset on trade in services by mode of supply: A WTO project funded by EU

Aim of project: create-maintain experimental dataset on services trade by mode of supply

Plan to be published in 2019

Possible applications:
- Better understand world trade developments
- Respond to analytical questions => looking for economic mechanisms, estimating impacts
- Orient trade negotiating strategies
- Encouraging national compilation programs

21

Trade in services data by mode of supply

Experimental Dataset of Trade in Services by Mode of Supply:

- Coverage: >200 reporters

- Year covered: 2005–2017

- Dimensions: reporter | year | ebops | mode | flow

- Granularity: 70 EBOPS items for BOP, 14 top-level ISIC items for FATS

- Capturing Flows to/from WORLD

22

Trade in services data by mode of supply

Gather the EBOPS data

Populate the EBOPS dataset using estimates

Apply the distribution of the modes (1,2, and 4)

Gather FATS data

Populate the FATS dataset using estimates

Merge the two dataset using a correspondence table

23

Trade in services data by mode of supply

Supply of Services by Modes
2014 Statistical Approximation

Mode of Supply	Estimated share
1 - cross-border supply	27%
2 - consumption abroad	15%
3 - commercial presence	53%
4 – presence of natural persons	5%

This is a baseline dataset and the quality is to be improved over time.

Conclusion

► Progress has been made for estimating services trade, but there are many gaps

► Need for coordination and political will for development of services trade statistics at the national, regional and international level as well as between different statistical agencies

25

Thank you

26

Services: The Data Dimension

Dr. Ben Shepherd
Principal, Developing Trade
Consultants & Consultant, US-ATAARI
November 5th, 2018 | Manila, The Philippines

US-APEC Technical Assistance to Advance Regional Integration (US-ATAARI)

A joint project of the U.S. Agency for International Development, the U.S. Department of State, and Asia-Pacific Economic Cooperation

Outline

1. Why do we need more data?
2. How can more and better data help promote better policies?
3. Key takeaways

Why do we need more data?

- Data is the raw material researchers in each economy use to examine the impacts of policies on economic performance.

- There is no direct measure of competitiveness, so data collection and analysis focuses on input and output measures.

  - Trade flows

  - Input-output relationships

  - Trade in value added

  - Quantitative measures of policies

- A key goal for any data collection or dissemination exercise is comparability: data for one region only can track performance over time, but if they differ substantially from the systems used elsewhere, there is no way to compare across regions.

- Good data are what makes good policy possible: moving beyond "intuition".

Why do we need more data?

Which limits their options.

Impacts are difficult to measure ex post.

Thereby weakening their negotiating position...

Benefits remain uncertain.

Policymakers use anecdotal information...

Inefficient Negotiations

Ability to provide solutions to concrete problems is limited
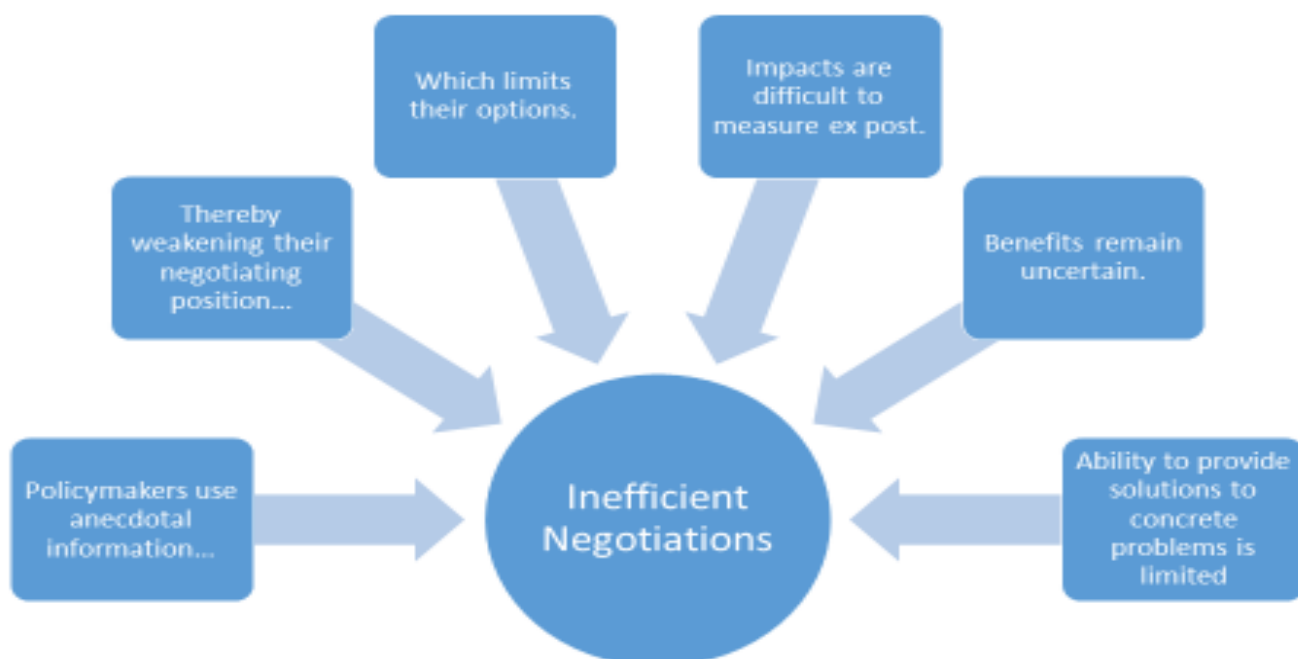
Source: Adapted from work by Justine Lan.

How can more and better data help promote better policies?

- Policy is a *process* as much as an outcome:
    - Diagnosis of a problem.
    - Brainstorming solutions.
    - Comparing costs and benefits of proposed solutions.
    - Design.
    - Implementation.
    - Ex post analysis of costs and benefits.
    - Rinse and repeat.
- Data can be used at each step, on the theory that more information leads to better decision making.
- True for policy in general, and trade policy in particular.

How can more and better data help promote better policies?

Trade in Services Data	TiVA Data	Policy Data
- Disaggregation by partner economy. - Disaggregation by sector. - Coverage of modes of supply: - M1: cross-border. - M2: movement of consumer. - M3: foreign establishment. - M4: movement of natural persons. - Shows what kinds of services are traded, what growth patterns are, with whom, and how.	- Needs disaggregated trade in services data as an input. - Shows how services interact with other sectors in the economy, in particular through input-output relationships. - Makes it possible to track "embodied" services trade and servicification. - Helps highlight the importance of services in economies where manufacturing is the main policy focus.	- No equivalent of tariffs. - GATS schedules (bound policies). - STRIs (applied policies). - MFN. - Preferential. - Ad hoc indices for particular sectors. - Facilitates empirical work linking policy to productivity, performance, and trade. - Facilitates ex post impact assessment of policy changes, as well as ex ante simulation to inform policy choices.

How can more and better data help promote better policies?
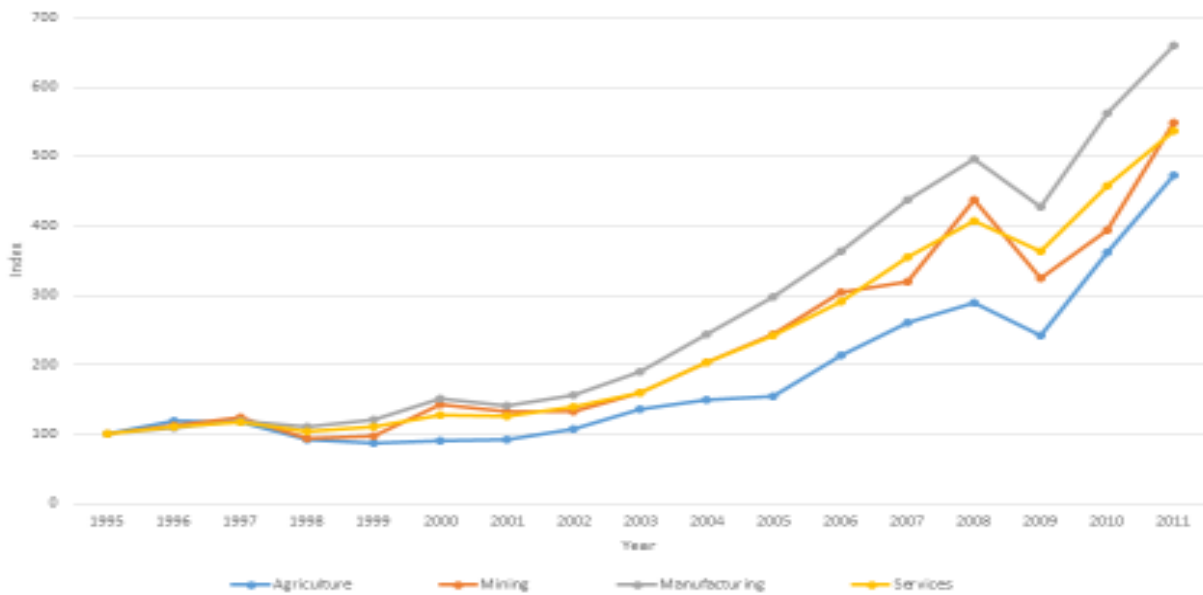
Source: Shepherd (Forthcoming)

How can more and better data help promote better policies?

79
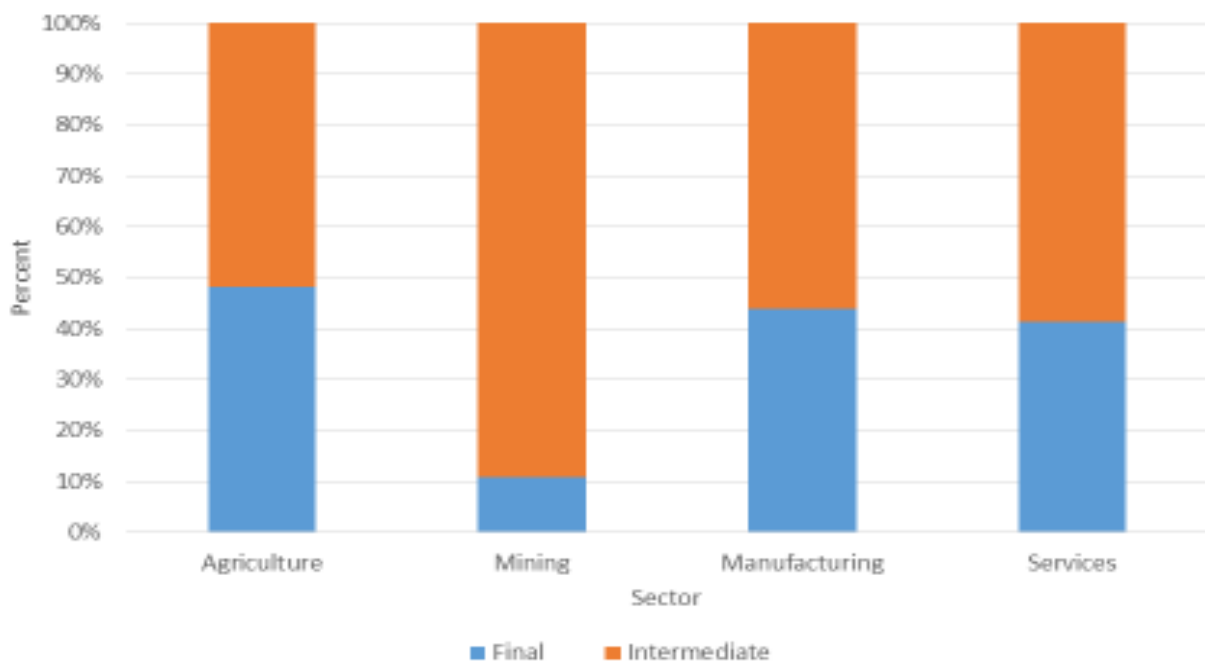
How can more and better data help promote better policies?
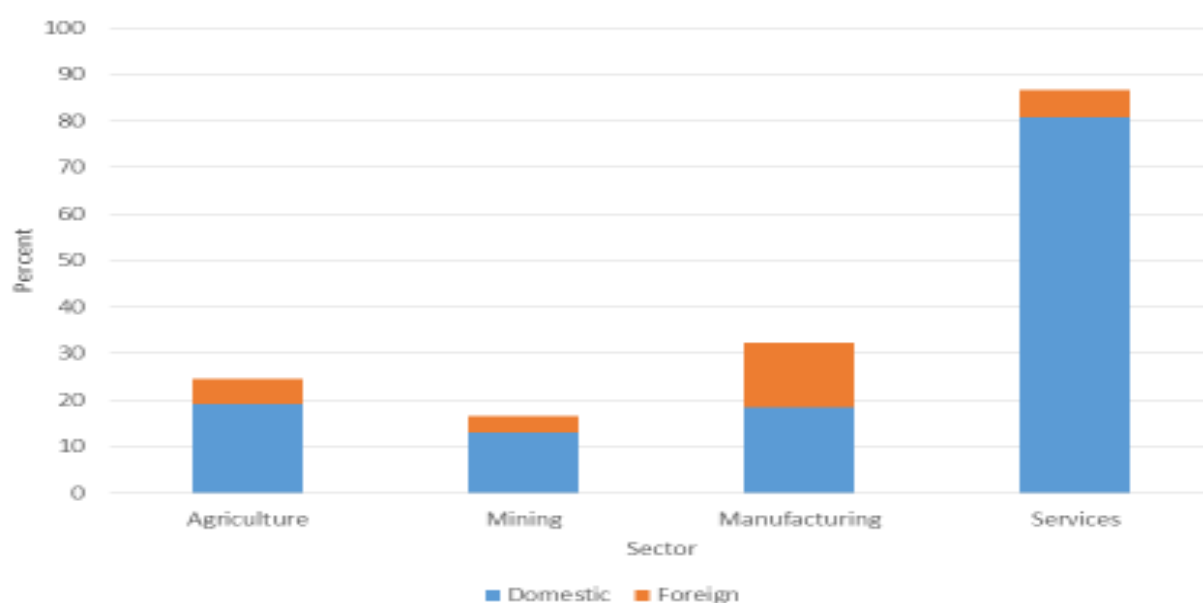
Key Takeaways

- Investing in better services trade data can have a high payoff:

  - Ability to track performance across time, and compare with regional partners, as well as outside the region.

  - Identify possible comparative advantage and disadvantage sectors.

  - Be more precise as to interests in trade policy reform, including through agreements where appropriate.

  - Promote research on trade in services.

- The need for more research on trade in services is very clear. Much less well understood than goods trade. Data is a key constraint.

  - Most data rich environment for trade in services is the EU, so European data tend to dominate research on trade in services, perhaps to the detriment of the concerns of economies with different patterns of specialization, including developing economies.

Key Takeaways

- Measuring and summarizing services policies, for instance through an STRI, is very important. But the availability of trade data will still be a key constraint on research and policy work.

  - Identification of the links between policy and productivity, as well as comparative advantage.

  - Estimating the effects of trade policy reforms on trade flows and welfare.

  - Looking at the effects of policy reforms on firm performance, and productivity upgrading.

- All of these questions are key for economies with large and growing services sectors.

- StatsAPEC currently only has simple aggregate indicators on commercial services: no disaggregation by partner or by sector!

Regulation on Data Flow, Supporting Digital Economy

Taufik Hasan
Indonesia Telecommunications Regulatory Authority (BRTI)
Manila, October 5, 2018
taufik@brti.or.id

Summary

- Status of e-commerce in Indonesia
- Government Economic Plan
- Regulation related to Data Flow
- Challenges to Data Regulation
- Proposed Revision on Previous Data Related Regulation
  - Data identification and Classification
- Indonesia's Solution for Data Flow Regulation

Development and Growth of e-Commerce

Economy	Growth (%)
Argentina	25
Malaysia	26
Singapore	26
China	27
India	27
Israel	31
Saudi Arabia	32
Viet Nam	32
UAE	33
Colombia	45
The Philippines	51
Mexico	59
Indonesia	78

Ecocnomies With High Growth e-commerce

Source: *Payment and e-commerce Report*, PPRO Financial Ltd, 2017
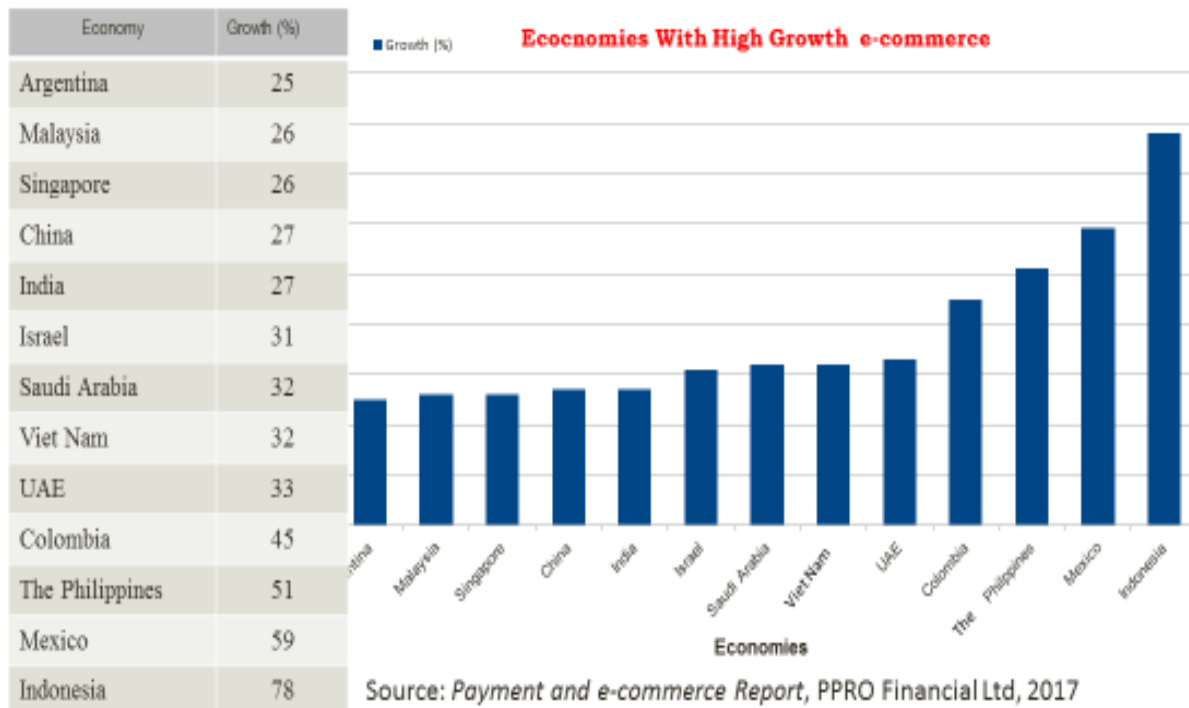
Indonesia E-Commerce in Numbers

Items	Indonesia	Asia	World
Population	257.563815	4,486,151,520	7,515,284,153
Population (+15)	186,238,246	3,409,475,155.20	5,561,310,273
GDP (USD Millions)	861,933	22,551,209.12	74,292,303.73
GDP per capita (USD)	3,346	5,664.48	10,112.33
Online Population	103,025,526	2,075,157,798.00	3,464,545,995.00
B2C E-Commerce (USD Billions)	7,62	1,082.17	2,495.70
Average Online spending (USD)	228	908.00	1,042.00

Top e-commerce segments

AIRLINES & HOTELS 17.7%   CLOTHING & FOOTWEAR 11.9%   HEALTH & BEAUTY 11.2%

78% World   14%   20% Asia

B2C e-commerce growth

Important local payment methods

ALFAMART
ALFAMIDI
ATMVA
BCA KLIKPAY
DOKU WALLET
INDOMARET
INDOSAT DOMPETKU
KASPAY
TCASH

Source: *Payment and e-commerce Report*, PPRO Financial Ltd, 2017

Indonesia Economic Plan

❖ Reach for USD 144 B digital economy and become the largest digital economy in ASEAN by 2020

❖ Presidential Decree on Road Map of e-commerce, No 74/2017

❖ Building Digital Infrastructure, Platform and Ecosystem, as one of 10 Indonesia Priority Program in "Making Indonesia 4.0"

❖ Create Indonesia Open Data "OneDATA" -

❖ Privacy and Data protection Law is being prepared, and to be enacted by 2019

Indonesia digital economy will grow at much faster rate than physical economy

Indonesia physical economy estimate (USD Bn)

876 — 2016   +8%   1,194 — 2020

Indonesia digital economy estimate (USD Bn)

65 — 2016   +22%   144 — 2020
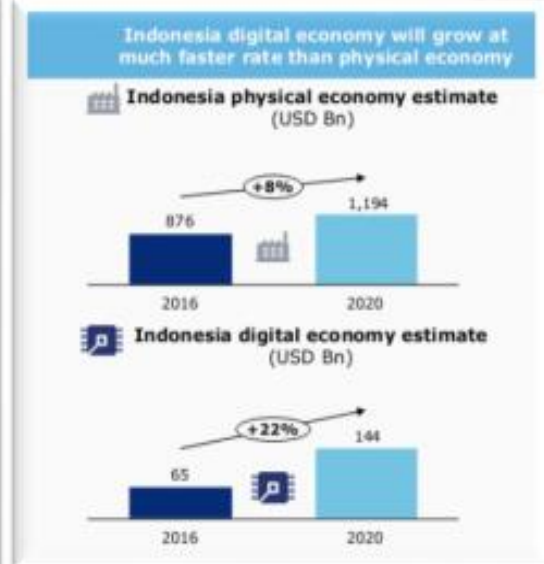
Source: BPS, Deloitte Analysis , World bank

Policy Of Data Flow: Earlier

All Data Center must physically be located domestically, regardless of type and owner of data

→ Ease of acess in case of necessity

→ Expected to create local industry

→ Efficient use of Bandwidth

→ No Definition of legal subjects related to data
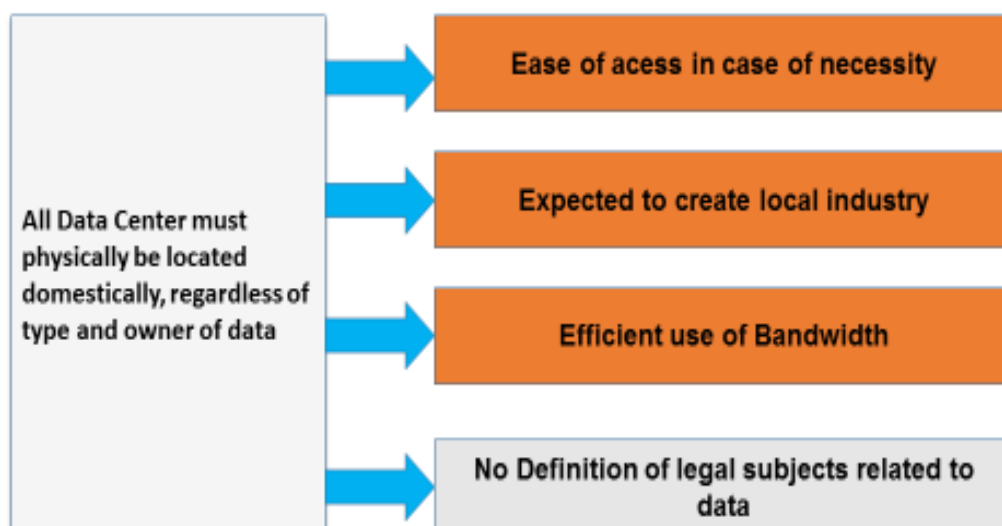
Goverment Decree on Electronic System and Transaction Providers, PP-82/2012

Policy Of Data Flow: Impacts

Requirements that Data Center must physically be located domestically, have negative impacts to GDP, Investment and business cost

→ Inefficient for same data protection scheme to all type of data

→ High cost data protection mechanisms of low importance data

→ Misuse of strategic and important data due to improperly protection or control

→ Reluctance of Investor despite no Penalty will be imposed in case of non compliance

Policy on the Data Flow: Change Objectives

Main changes are:
- ➢ to manage how the data is treated, not physical location of data center, and
- ➢ ensuring proper role of legal subject related to data: Data Owner, Data Collector, Data Processor

- ❑ Based on data type classification according to risk and its impact of data collection and processing.
- ❑ Clarify the role of sectors' regulators
- ❑ Avoid unnecessary high cost management of data by classifying data into strategic and high and low risk
- ❑ In priciple all all electronic data must be managed, processed, and stored in Indonesia, but for certain condition high and low risk data can be processed, managed and stored outside Indonesia, provided that related entity can ensure the access to maintain data protection and interest of Indonesian law and security enforcement

Ascertain business condition favorable to investor

Invite investment and ease of creating business, supporting the growth of digital economy

Encourage the creation of regulation on data protection

Legal support for proper information securiy,

Promoting transparance in collecting, storing, processing and managing electronic data

Preserve the sovereignity of Citizen data

Penalty will be imposed in case of non compliance

Data Identification and Classification

Ditjen Aptika, MCIT Indonesia

Identification Process

Decreed by President

→

Sector Regulatory Agents (SRA- IPPS)

Identifying Strategic Electronic Data based on the criteria that misuse, or breach may result in :

- Threat to the government operaton;
- Threat to the state security;
- Other criteria based on relevant Law

Identifying High Elctronic Data misuse or breach will affect or has impact limited to the interest of data owner or confined within the sector

Data Classification

Recommend to the **President** to classifiy Strategic Electronic

Presidential Decree on the management, processing, storage, exchange, and/or multiplication of Strategic Electronic Data

Recommend to the **minister** to classify High Risk Data

SRA is authorized to regulate further how Strategic Electronic Data is managed, stored, transmit, exchange and/or duplicated

---

Ditjen Aptika, MCIT Indonesia

	Strategic Electronic Data	High Electronic Data
Management, Processing and Storage	• **Mandatorily located in Indonesia, Using Indonesian Network of Electronic System.** • **Create a mirror and connected to integrated Data Center.**	• **Can be located outside Indonesia territory,** • **Shall ensure the effectiveness of the exercise of Indonesian jurisdiction law.**
	Shall be kept in storage for the duration in accordance with relevant SRA	
	Shall comply with Privacy and Data Protection Regulation as well as ensuring state sovereignty	
Transmission, Exchange, dan Duplication	• Must be kept inside the juridiction, except with the Presidential agreement , e.g data related to terorism act	-
Technical Requirements	• **Governed by Presidential decree.**	• **Governed by SRA Regulation**
Data Access	**Must provide access for legal control and law enforment**	

Business Community Concerns

- ❑ Economic:
  - ✓ Domestic business opportunity with growth of sectors
  - ✓ Level playing field
- ❑ Sovereignty of data
- ❑ Security of data access in case of necessity

The win-win Solution

More efficient mechanism of data protection
Clear role of Sector Regulator with knowledge of sectors' requirements, not a blanket regulation
Preserve sovereignty of citizen data
Ensure privacy and data protection
Access of data to law enforcer for security purpose
Preserve domestic players opportunity with huge government data needs
Consider level playing field

Using data to guide telecommunication regulations: Peruvian Case

Marco Antonio Vilchez Román

Submanager of Regulation
Regulatory Policies and Competition Management

November, 2018

osiptel
EL REGULADOR DE LAS TELECOMUNICACIONES

Peru: generalities

- **Geographically:**
  - ➤ Located in South America, next to the Pacific Ocean.
  - ➤ Has 3 natural regions: coast, mountains and the jungle.

Key features	Unit
Size	1 285 215.6 Km²
Population	31 237 385 (2017)
GDP per capita	6 762 USD (2017)

TELECOM SECTOR

Among public services, it is the most important in terms of its contribution to GDP (4.4% on 2017, and growing)

Contribution to Peruvian GDP per sector
(Constant 1997 PEN)

GDP Contribution	1994	2017	Var.%
Telecommunications	1.64%	4.4%	167%
Electricity, gas and water	1.52%	1.8%	21%

Source: INEI.

GDP evolution per sector

88
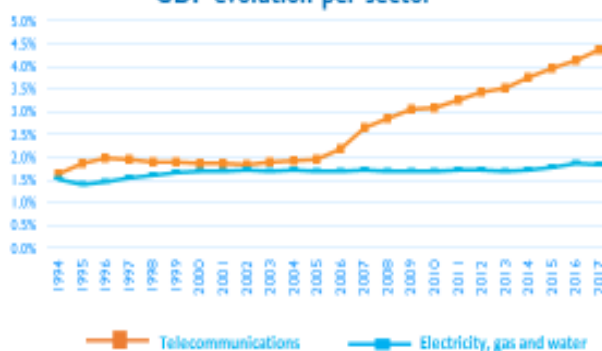
Telecom Services: Home Access to 2012-2017

Total Homes:
In 2016: 8.580.401 / In 2017**: 8.873.430
Homes with Internet:
At 2016: 5.712.244 / At 2017**: 6.687.033

Legend:
- Fixed Telephony
- Mobile
- Internet (fixed and mobile)
- Pay TV
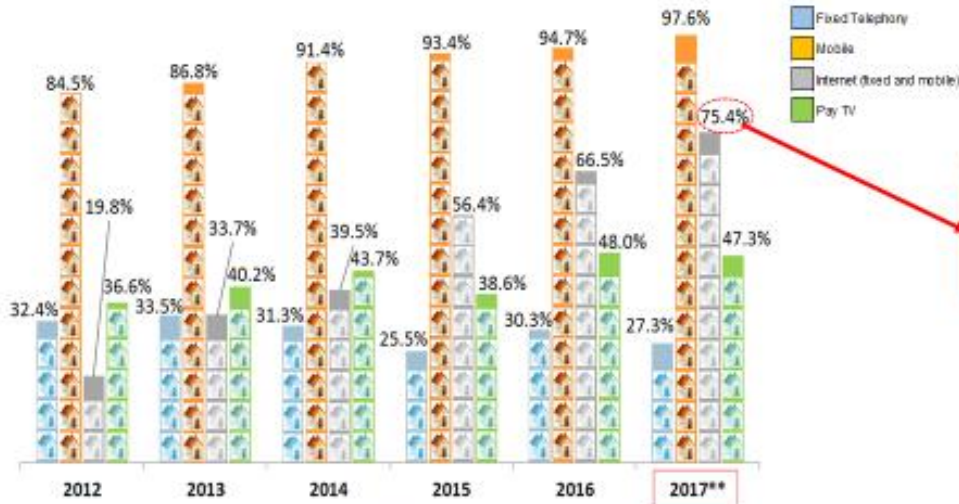
About 4 out of 5 Peruvian homes would already have internet access (fixed and/or mobile).

Source: OSIPTEL- Annual Consumer Demand Survey (ERESTEL), 2012-2016.

6

Access to Telecom Services

PERÚ — LIMA METROPOLITANA — RESTO URBANO — RURAL

Legend: Fixed, Mobile, Pay TV, Internet at home

Source: ENAHO - INEI
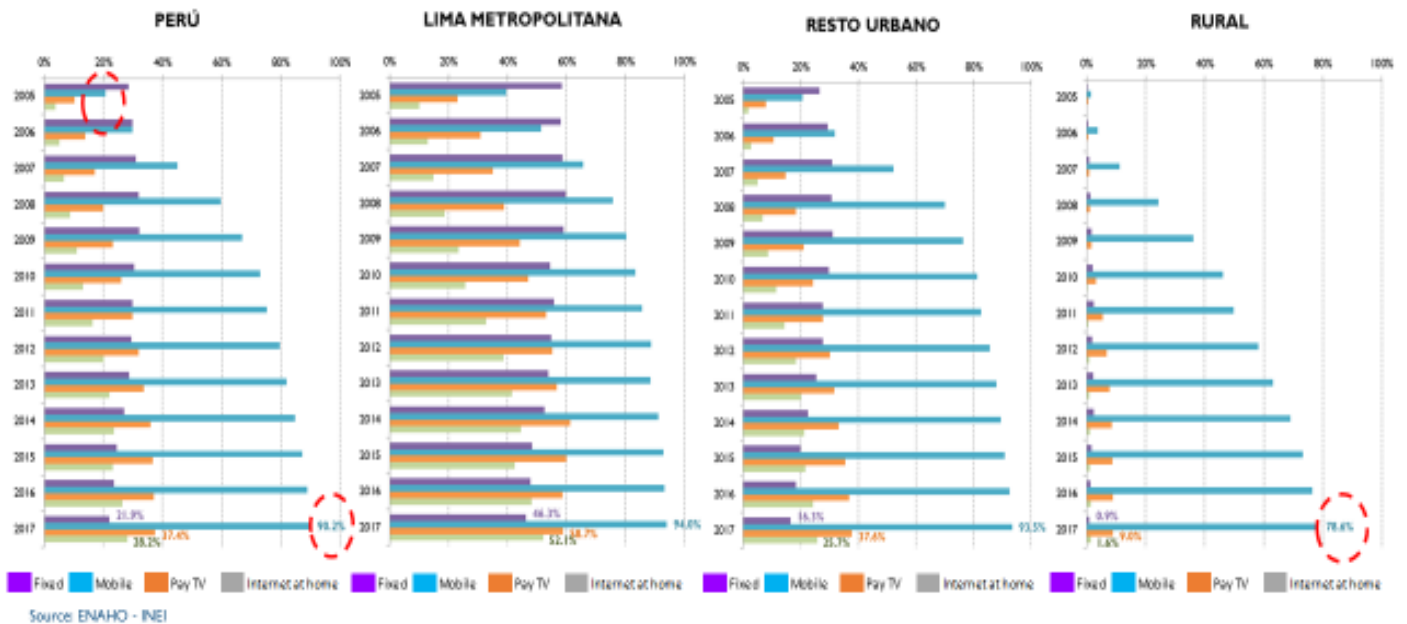
Mobile telephony access has significantly increased in this period, including rural areas where access by the end of 2017 reached 78.6%. Pay TV and fixed internet: access has grown.
Fixed telephony access has reduced for the last 10 years.

Telecom services: different paths

Fixed telephony and Public Payphones
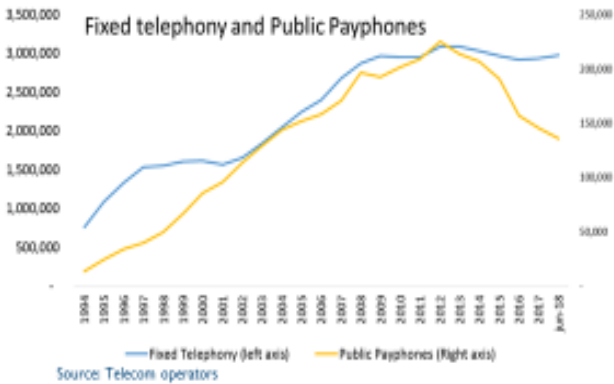
Telecom traditional services: stagnation and decrease

Pay TV and Fixed Internet (in millions)
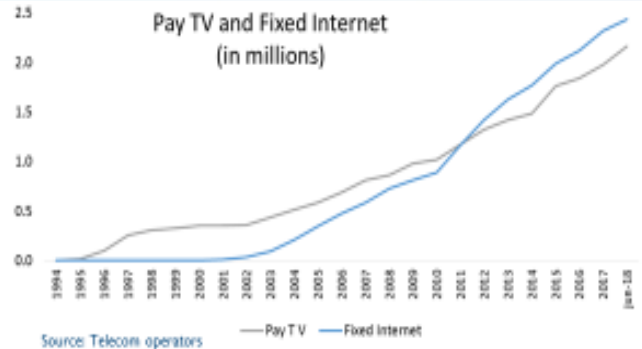
Competitive services: steady growth

Mobile (in millions)
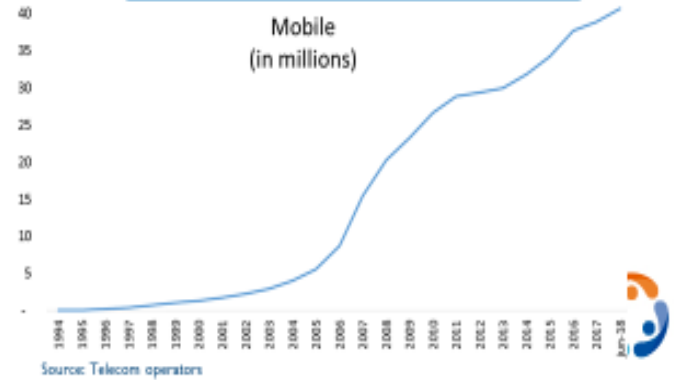
More competition in mobile markets

Better offers and promotions have reduced mobile Internet rates → increase of mobile internet traffic
- Consumers are taking advantage of mobile operator's offers (e.g. mobile plans with unlimited data or with zero-rated apps, OTT use)
- More intense use of data.

Mobile Internet rates (PEN per MB used)

MB on "bulk" data	MB on Mobile packages	Implied rate per MB
0.083	0.017	0.005

Mobile Internet: Total Traffic (Million of MB, quarterly)

2014.I	2016.IV	2017.IV
5,883	60,103	166,991
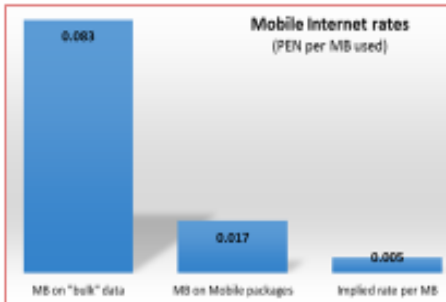
Traffic increased 177% between 2016-IV and 2017-IV

Mobile Internet: Average Traffic per line (Million of MB, quarterly)

2014.I	2016.IV	2017.IV
517	3,070	7,890
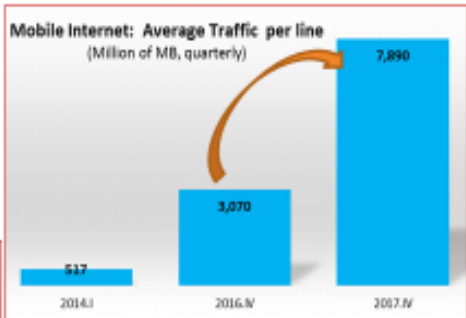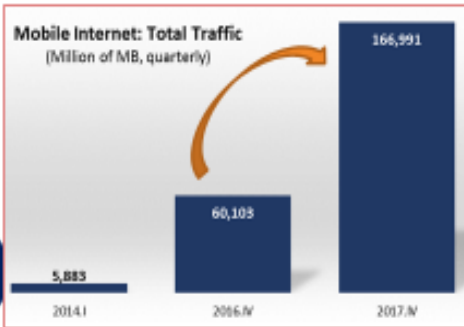
Increase in average traffic per line of 157% between 2016-IV and 2017-IV

Market shares in Telecom services

Market Shares in Services: 2018, 2nd Q

"Small" mobile operators share: 31%

	Mobile	Pay TV	Fixed Internet	Fixed Telephony
Viettel	13%			
Entel	18%		5%	3%
Claro	32%	9%	19%	19%
Directv		17%		
Others		10%		
Telefónica	38%	64%	76%	77%

Source: Telecom operators

■ Telefónica ■ Claro ■ Entel ■ Viettel ■ Directv ■ Others

Significant concentration in market segments, except in the mobile case.
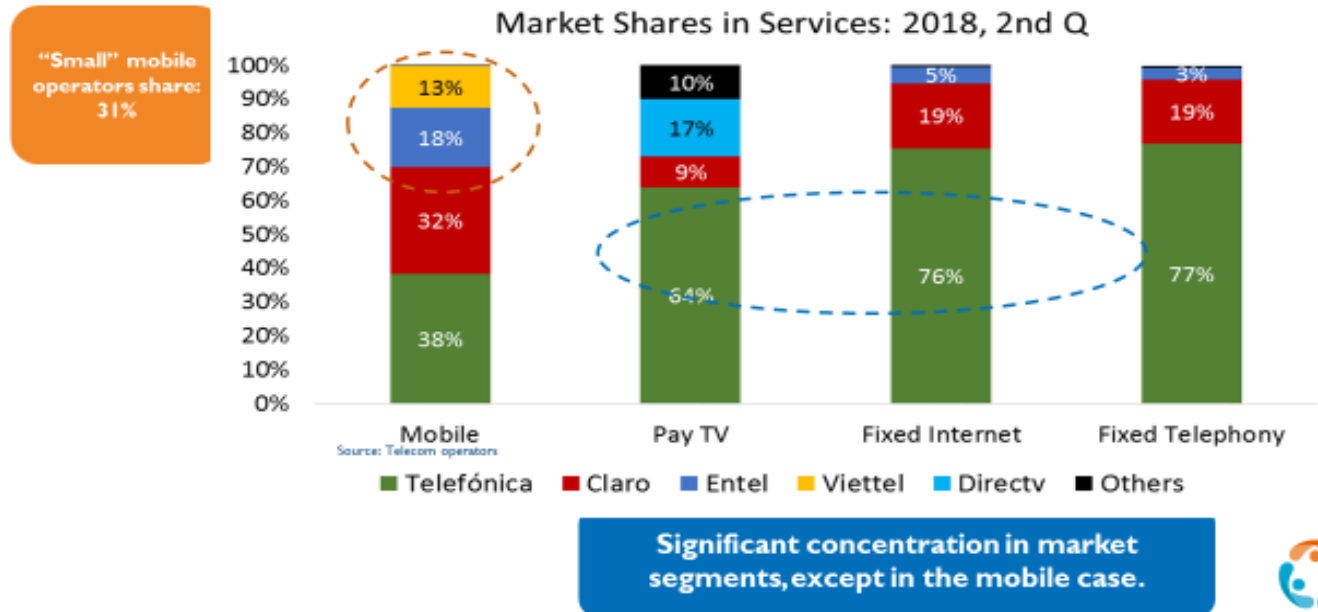
OSIPTEL Data Collection systems

Periodic Information System (SIGEP) SIGEP-BI → Quantity, Performance, Financial, Mobile portability, and User claims

Price Information System (SIRT)

Annual Consumer Demand Survey (ERESTEL) (Resultados 2016)here

Other internal Data collected → Coverage, call accessibility and retention of mobile voice service

Key Performace Indicators

Others →
- Internal reports
- Tariff benchmarks
- Statistics prepared by other regulators or international public bodies

OSIPTEL regulations ......

Vision of the market

Theoretical foundation

International experiences

Data support

Data used in .....Mobile Number Portability (2018): improvements to make it more effective

Number of portations: may-october 2016

Source: Telecom operators

The **76%** didn't have an active week in the X operator's network

Portations made a few days after after registering the service: Jan 2017 - Apr 2018

Source: Telecom operators

Operators, as donor, incur in unnecessary costs (marketing, identity verification, operational, platforms, etc)

Previous unanswered questions: Nov 2017- March 2018

Source: Telecom operators   ■ Nov-17 ■ Mar-18

Donor operators increase the number of <u>previous questions</u> without answer (receiving operator wants to validate the requirements for portation).

> ➢ 24 hours including weekends
> ➢ Cheaper portability for operators
> ➢ Reduce the stay period: 1 month of permanence instead of 2 months

Number of TV with access to Pay TV service

27% of households acquires 2 decoders, but they only have 1 TV with access to Pay TV service

Source: ERESTEL
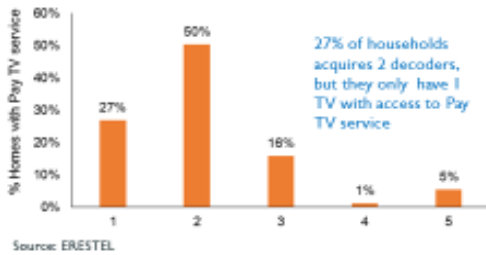
Households with Pay TV services with decoders: reasons not to switch operator during last 12 months

- Switching costs: 52%
- I do not need it: 21%
- Other reasons: 26%

Source: ERESTEL

Households with Pay TV services with decoders: reasons to switch operator during last 12 months, but they didn't get to do it

- Switching costs: 76%
- There is no other option in my area: 6%
- Other reasons: 17%

Source: ERESTEL

Switching costs comparisons for households with Pay TV decoders, that thought to switch but they didn't get to do it

Source: ERESTEL

Components of monoproduct postpaid Pay TV rates: Commercial offer for 2 decoders, December 2017
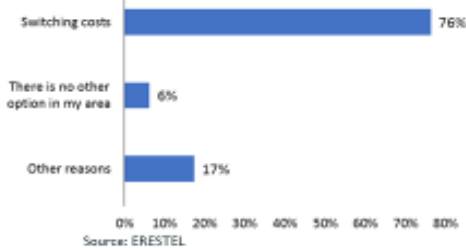
| Operator | Rate concepts | | | | | Features | | | | | | Total monthly fee |
	Monthly rent	Installation fee	Payment for 1st deco	Payment for 2nd deco	Additional guarantees	Forced term of permanence	Delivery method			Financing		
							1st deco	2nd deco	More decos	Installation	1st deco	
MOVISTAR	S/. 89.9	S/. 0.0	S/. 12.9	Free	S/. 0	No	Sale	Free	Rent	No	Yes, 24 monthly fees	S/. 103
CLARO	S/. 99.0	S/. 12.9	S/. 0.0	S/. 5	S/. 0	No	Loan	Rent	Rent	Yes, 24 monthly fees	No	S/. 117
DIRECTV	S/. 82.0	S/. 1.0	S/. 0.0	S/. 10	S/. 11	Yes, 6 months	Loan	Rent	Rent	No	No	S/. 104

Source: SIRT

The monthly payment for the Pay TV service includes the payment for the decoder. All the equipment (including the decoder) is part of the Pay TV service.

Data used in … General Tariff Regulation: Proposal to empower users

Have you ever changed your rate plan?
(mobile services)

- 9,5%
- 6,6%
- 8,8%
- 9,7%
- 65,5%
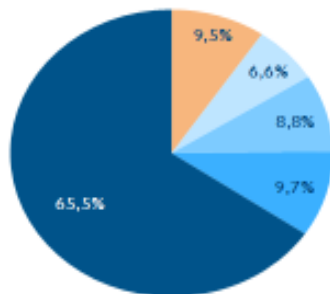
Legend:
- Yes
- No (being a user at least 1 year ago)
- No (being a user between 1 and 2 years)
- No (being a user between 2 and 3 years)
- No (being a user for more than 3 years)

Source: ERESTEL.

Distribution of the duration time of promotional rates (mobile services)

Source: SIRT.
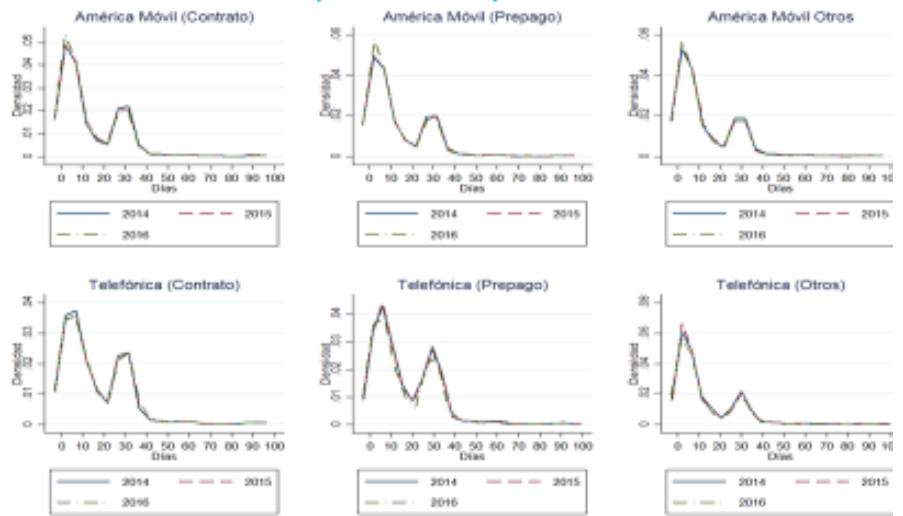
Promotional mobile rates are excluded from the limits established for duration and validity

OSIPTEL Data Collection problems

Periodic Information System (SIGEP)	→ Subreport, quality, it's not submitted on time
Price Information System (SIRT)	→ Diffuse, confuse
Annual Consumer Demand Survey (ERESTEL)	→ Budgetary isues: no every year, no local disaggregation or inference, changes in question modules
Coverage, call accessibility and retention of mobile voice service	→ Quality
Key Performace Indicators	→ Measurement, level of aggregation
Internal reports / Tariff benchmarks / Statistics prepared by other regulators or international public bodies	→ Frequency and continuity

Challenges: Reduce consumer asymmetries → information tool

Challenges: new economic digital environment→ ensure healthy competition ... new players (OTT)

Data and OTT usage – Demand side

Data Usage From Mobile Connection

- Search for information: 58.7%, 51.8%, 58.2%
- Social networks (E.g. Facebook): 86.5%, 83.4%, 90.2%
- Mail: 44.0%, 41.8%, 37.4%
- Listen to music, watch videos: 26.3%, 22.8%, 23.0%
- Read the news: 14.7%, 19.6%, 22.0%
- Download music, movies: 16.7%, 11.6%, 9.7%
- Online gaming: 7.2%, 7.8%, 5.7%
- Instant messaging (e.g. Line, Whatsapp): 36.6%, 59.4%, 73.4%
- Download software: 8.0%, 4.8%, 3.0%
- Phone calls (e.g. Skype): 7.0%, 5.0%, 4.3%
- Bank transactions: 2.9%, 3.7%, 5.0%
- Search jobs: 4.5%, 1.4%, 1.5%
- Buy or sell a product or service: 2.3%, 3.7%, 3.0%
- Others: 0.6%, 0.2%, 0.4%

Source: ERESTEL

Frequency of use of mobile connections

- Daily: 67.7%, 81.1%
- Every other day: 23.9%, 15.1%
- Weekly: 6.1%, 3.0%
- At least once a month: 2.3%, 0.8%

■ Without zero-rating
■ With zero-rating

Source: ERESTEL

Data Usage from Mobile Connextion Zero-Rating Offers

- Social networks (E.g. Facebook,...): 91.0%, 90.3%
- Instant messaging (E.g. Whatsapp,...): 72.9%, 76.0%
- Search for information: 54.6%, 60.6%
- Mail: 32.7%, 41.9%
- Listen to music or watch videos: 20.6%, 24.3%
- Read the news: 19.4%, 23.8%
- Download music or videos: 8.0%, 10.8%
- Bank transactions: 2.4%, 7.1%
- Online gaming: 5.1%, 5.8%
- Make phone calls (e.g. Skype): 3.2%, 4.5%
- Buy or sell products or services: 1.9%, 3.8%
- Download software: 2.6%, 3.4%

■ Without zero-rating
■ With zero-rating
- Search jobs: 1.5%, 2.2%
- Others: 0.3%, 0.3%

Source: ERESTEL

Challenges: Data allows to validate behavioral biases for the design of public policies (Behavior economics)

Behavior Economics: Should be taken into account anomalies or behavioral biases in the decision making of economic agents, as well as the context in which they are carried out since these can generate wrong decisions

Information:
- Importance of providing tools that facilitate decision making
- To create a system that standardizes the information to be presented and that facilitate comparisons.

Users consumptions
- Sort, transparent or simplify the information in the receipts.
- Importance of highlighting possible better decisions

Customer support
- The service must be easy to access.
- Service procedures must be simple.
- Importance of reputations or prestige rankings (f.i., ranking of quality in customer support service).

96

Concluding remarks

- OSIPTEL's misión: To promote competition in the telecommunications market, quality of telecommunications services and user empowerment; in a continuous, efficient and timely manner.
- Digital economy has establish a new environment of telecom market (convergence, OTTs, AI, IOT, Machine learning, data governance, ...)
- Although the policies implemented have proven to be successful, the focus in the future will be to empower consumers so that competitive intensity is maintained (e.g. informing about better plans that consumers could be using, establishing new key performance indicators about the qualitiy of service and customer support).
- Task: constantly evaluating market results, in order to propose new policies that could keep or increase competition → INTENSIVE USE OF DATA (Good quality of data, data really informative).
- We must adopt and develop regulatory frameworks and processes that ensure an environment of healthy competition and without distortions that affect the development of the telecommunication market.

osiptel

EL REGULADOR DE LAS
TELECOMUNICACIONES

Fonoayuda	Facebook	Twitter
0-801-121-21	/OsiptelOficial	@OSIPTEL

Update on APEC STRI & Technical Group

Andre Wirjo
APEC Policy Support Unit
5-6 November 2018 • Manila

Advancing Free Trade
for Asia-Pacific **Prosperity**

Copyright © 2018 APEC Secretariat

Presentation outline

1. Background

2. What happened since?
   - OECD and World Bank/WTO STRI

3. APEC Index and ASCR baseline indicators

Asia-Pacific
Economic Cooperation

Background

APEC Services Cooperation Framework (ASCF)

APEC Services Competitiveness Roadmap (ASCR)

Nov 2015

Nov 2016

May 2016

Aug 2017

Capacity Building Workshop on Measuring the Regulatory Environment in Services Trade of APEC

Next Steps for the Work of Measuring the Regulatory Environment in Services Trade of APEC

Asia-Pacific
Economic Cooperation

About the Technical Group

- Comprises of members from 12 economies (AUS; CHL; PRC; HKC; JPN; ROK; MAS; PE; SGP; CT; USA; VN), OECD, World Bank and PSU.
- Chaired by Dr. June Dong Kim of Korea.
- Objectives:
    - Develop a **draft APEC index**.
    - Decide the details of **pilot program** and implement it for **volunteer economies**.
    - Develop **a new project to expand coverage** of APEC index to additional economies, with a view to expanding to all remaining economies.

Asia-Pacific
Economic Cooperation

What happened since?

Capacity building activities

- Workshop on Trade in Services Index Data **(Oct 2017)**

- APEC Symposium on Services Trade **(May-Jun 2018)**

- Capacity Building Workshop on Information Gathering Techniques for Assessing the Services Environment **(Now)**

Technical Group (TG) establishment and meetings

- Establishment of TG **(May 2018)**

- 1st TG Meeting **(May 2018)**

- 2nd TG Meeting **(Aug 2018)**

Asia-Pacific Economic Cooperation

1st TG Meeting

- Presentation on existing services-related indices.

- Exploratory work on developing the APEC Index:

    - **[Index]** Build on existing indices or new?
    - **[Approach and sector coverage]** Comprehensive or gradual?
    - **[Policy areas]** Are there areas to improve and/or add?
    - **[Techniques]** How are measures scored?
    - **[Weights]** Should they be modified?

Asia-Pacific Economic Cooperation

2nd TG Meeting

- Discussions on objective of APEC Index.

- Understanding the OECD, World Bank 2008 and WB/WTO 2016 STRI:

  o Comparison table across selected areas of interest to economies.

Comparison between indices – Economy coverage

OECD	World Bank 2008	World Bank/WTO 2016
• 44 economies. • 11 APEC economies covered are: AUS; CDA; CHL; PRC; INA; JPN; ROK; MEX; NZ; RUS; and USA. • Two economies will be added in 2018: MAS and THA.	• 103 economies. • 16 APEC economies covered are: AUS; CDA; CH; PRC; INA; JPN; ROK; MAS; MEX; NZ; PE; PHL; RUS; THA; USA; and VN.	• 58 economies have two data points. • 19 APEC economies covered are: AUS; CDA; CHL; PRC; HKC; INA; JPN; ROK; MAS; MEX; NZ; PE; PHL; RUS; SGP; CT; THA; USA; and VN.

Note: The WB/WTO 2016 update has not been released publicly.
Source: Compilations by APEC Policy Support Unit.

Comparison between indices – Database assembly

OECD	World Bank 2008	World Bank/WTO 2016
• Direct collection and analysis of laws/regulations. • 5-6 years to decide and agree on list of measures. • Approx. 16,000 laws and regulations manually pored annually to keep database updated.	• For non-OECD economies – completion of questionnaire by local law firms. • For OECD economies – publicly available sources (e.g. WTO Trade Policy Review, IMF annual reports).	• Enhanced classification of measures consistent with taxonomy used by OECD. • For non-OECD economies – completion of questionnaire by local law firms. • For OECD economies – reliance on OECD STRI database.

Source: Compilations by APEC Policy Support Unit.

Asia-Pacific
Economic Cooperation

Comparison between indices – Index construction

OECD	World Bank 2008	World Bank/WTO 2016
• Binary scoring. • Brackets and thresholds used for continuous and/or complex measures. • Hierarchies and associations to account for linkages. • Different scoring systems to account for market structure and regulatory regime variation.	• 5-point scale (i.e. 0, 25, 50, 75 or 100). • Brackets for numeric type restrictions. • Combination of sets of measures considered to assess restrictiveness levels (i.e. associations). • Certain measures are considered only if certain conditions are met (i.e. hierarchies). • Overall restrictiveness score for each subsector-mode to account for binding restrictions and avoid double counting (i.e. associations and hierarchies).	• 6-point scale (i.e. 0, 0.125, 0.25, 0.50, 0.75 or 1). • Brackets for numeric type restrictions. • Combination of sets of measures considered to assess restrictiveness levels (i.e. associations). • Certain measures are considered only if certain conditions are met (i.e. hierarchies). • Overall restrictiveness score for each subsector-mode to account for binding restrictions and avoid double counting (i.e. associations and hierarchies).

Source: Compilations by APEC Policy Support Unit.

Asia-Pacific
Economic Cooperation
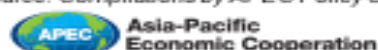
Comparison between indices – Aggregation level and weights for sectoral aggregation

OECD	World Bank 2008	World Bank/WTO 2016
• Sectoral only. • Expert judgement. • 30-50 experts per sector allocate weights to 5 policy areas covered. • Experts selected based on sectoral expertise.	• Sectoral and economy. • Consultation on modal importance with private sector representatives and regulators. • Sub-sectoral score is weighted average across modes of supply. • Sectoral/broad area score is simple average of sub-sectoral scores.	• Sectoral and economy. • Consultation on modal importance with private sector representatives and regulators. • Sub-sectoral score is weighted average across modes of supply. • Sectoral/broad area score is simple average of sub-sectoral scores.

Source: Compilations by APEC Policy Support Unit.

Asia-Pacific
Economic Cooperation

Comparison between indices – MFN and preferential policy regime coverage; and update frequency

OECD	World Bank 2008	World Bank/WTO 2016
• Generally MFN. • However, preferential regime can be captured.	• Generally MFN. • Limited coverage on preferential policies (e.g. EU).	• MFN and preferential policies are covered. • However, review of information to date indicates non-consistent coverage of APEC specific policy initiatives
• Database: annually since 2014. • Methodology: generally biennial.	• Database: no annual update. • Methodology: no update.	• Database: 2008-11 and 2016. Details of next update as yet undetermined. • Methodology: updated in 2016. Working with OECD to improve comparability.

Source: Compilations by APEC Policy Support Unit.

Asia-Pacific
Economic Cooperation

## 2nd TG Meeting – Outcome and other issues

- Outcome:

  - **[Base index]** No consensus.
  - **[Approach]** Incremental.
  - **[Sector coverage]** Members to provide 10 preferred sectors by end-Oct 2018.
  - **[Policy areas]** No consensus. Worthwhile to look at policy measures instead of areas.
  - **[Weights]** Flexible on weights revision but need to consider resources constraint and should not risk comparability.

- Other issues:

  - Costs, data verification, updates.

Asia-Pacific
Economic Cooperation

APEC Services Competitiveness Roadmap (ASCR)

- Endorsed by **APEC Leaders** in November 2016.
- Aimed at **facilitating services trade and investment and enhancing the competitiveness of service sector** in the region by 2025.
- Some examples of enabling factors:
  - Promoting good regulatory practices, international regulatory cooperation and sound competition policy frameworks and institutions;
  - Ensuring more open services markets;
  - Ensuring an adequate supply of skills in a rapidly changing economy;
  - Facilitating effective and inclusive financial markets.
- Encourages economies to undertake **unilateral actions** as well as **cooperate closely at the regional level** by undertaking actions at APEC-wide level.
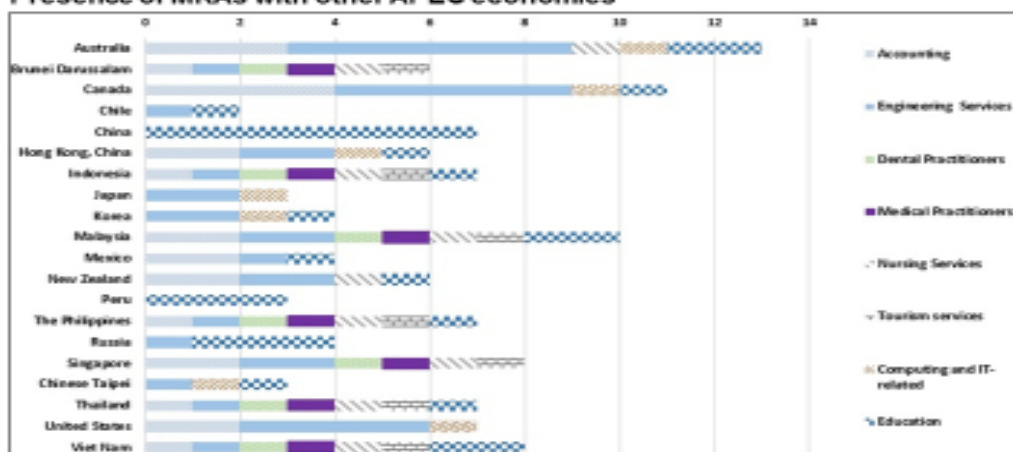
Asia-Pacific
Economic Cooperation
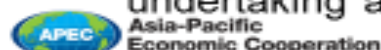
Baseline for APEC-wide action #8

Supporting cooperation in the education sector including promoting internship schemes, overseas student exchange programs, and collaborative policy studies, as well as, in accordance with domestic education systems, information sharing pertinent to economies' education standards, qualifications and credit systems to measures to explore mutual recognition.

Indicator: Cross-recognition of educational standards and professional qualifications.

Presence of MRAs with other APEC economies

- Economies with significant number of MRAs supporting cross-border mobility of certain professionals with other APEC economies include Australia; Canada; Malaysia; Singapore; and Viet Nam

Source: PSU's compilations (March 2017) and survey responses of HRDWG members (April–June 2017).

Asia-Pacific Economic Cooperation

Baseline for APEC-wide action #12

Support APEC's work on developing the travel and tourism sector for sustainable and inclusive growth, building on the work of the APEC Tourism Strategic Plan.

Indicator: Passport Index — Intra-APEC visa restrictions.

No. of APEC economies requiring visa from the origin economy

Origin economy	Of economies requiring visa from nationals of origin economy	
	Number via eTA, eVisa, and visa on arrival	Number via non-electronic submission of requirements
Australia	4	3
Brunei Darussalam	4	3
Canada	2	3
Chile	4	3
China	3	14
Hong Kong, China	4	2
Indonesia	2	9
Japan	4	1
Korea	4	1
Malaysia	2	4
Mexico	3	7
New Zealand	4	3
Papua New Guinea	3	11
Peru	2	7
The Philippines	2	10
Russia	2	9
Singapore	4	1
Chinese Taipei	9	3
Thailand	2	5
United States	2	3
Viet Nam	1	13

- From the perspective of the origin economy, between 5 to 17 other APEC economies require their nationals to obtain visas.

- It should be acknowledged, however, that economies have facilitated the process through the use of electronic travel authorization (eTA), eVisa and visa on arrival.

Note: eTA refers to electronic travel authorization. Passport index data have been adjusted using economy sources, e.g. Hong Kong, China residents do not need visa for China but nevertheless need to have "Home Return Permit". The table above considers the two as distinct. Source: Passport Index (https://www.passportindex.org/comparebyPassport.php?p1=roz&s=yes). Accessed 26 April 2017.

Asia-Pacific Economic Cooperation

ASCR and the role of APEC Index

- APEC Index identified as indicators in several APEC-wide actions.

- Development would extend coverage and lead to better measure of progress.

Asia-Pacific
Economic Cooperation

Find out more
APEC Online and Social Media

apec.org

@APECnews

@APEC
@Bollard_APEC

@apec

APEC – Asia-Pacific Economic Cooperation

Asia-Pacific
Economic Cooperation

SESSION 2:

MEASURING THE REGULATORY ENVIRONMENT FOR SERVICES TRADE

Manila, 6 November 2018

Janos Ferencz
Trade in Services Division
OECD

OECD
BETTER POLICIES FOR BETTER LIVES

Measuring the regulatory environment for services

2

Services are important in the region
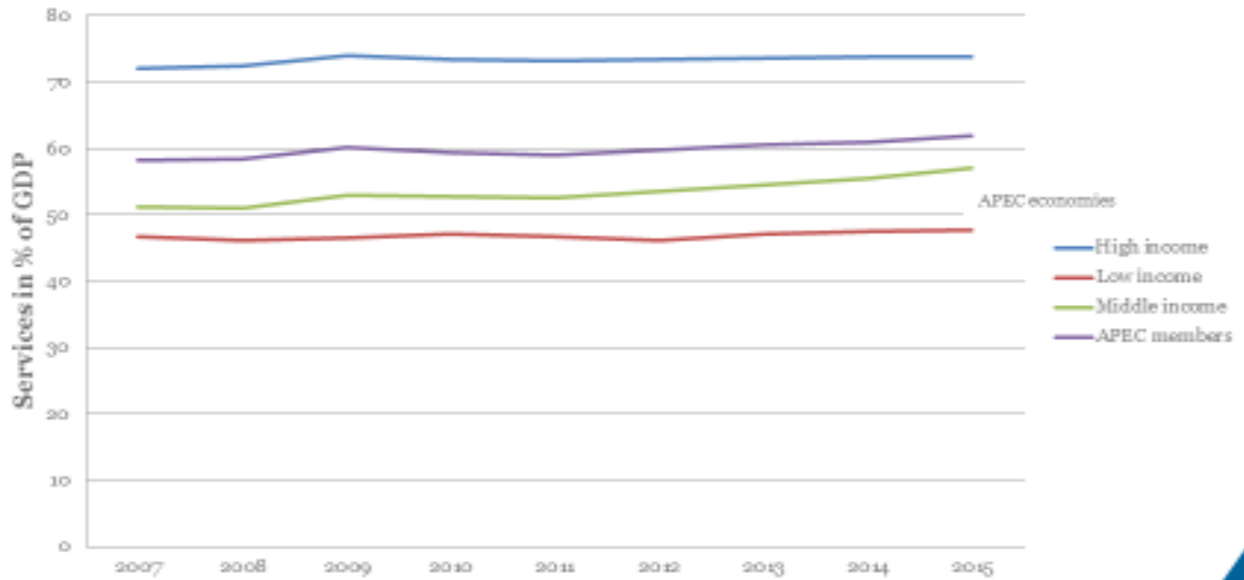
Source: WB WDI

OECD STRI objectives
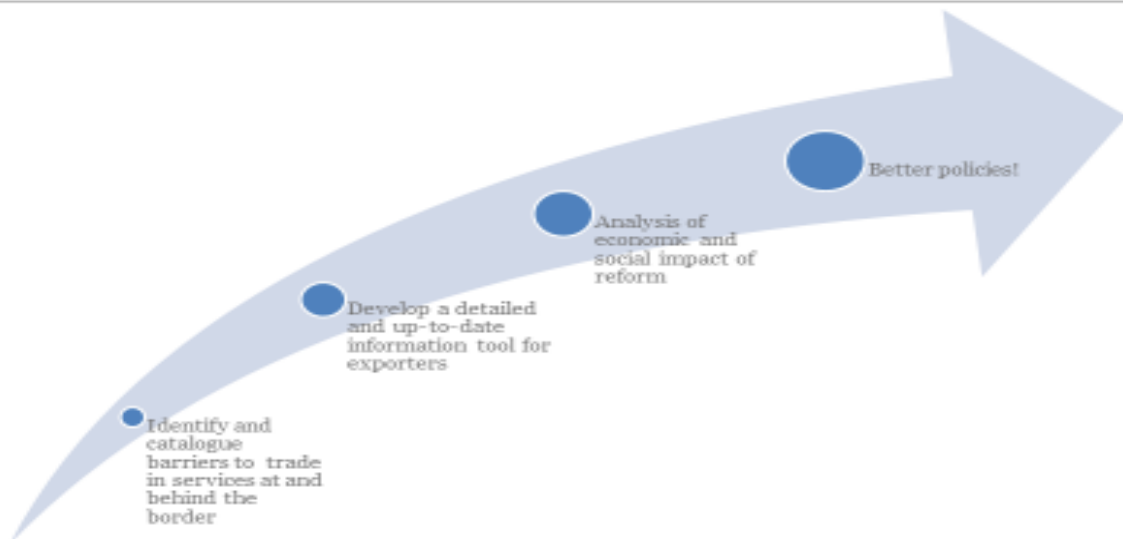
OECD STRI sectoral coverage

Digital Network	Supply Chain	Trade and Finance Support	Physical Infrastructure
Computer	Transport	Legal	Architecture
Telecoms	Logistics	Accounting	Engineering
Audiovisual	Distribution	Financial	Construction

OECD STRI methodology

OECD STRI regulatory database

- Standardised set of measures, with links to sources – more than 16000 laws and regulations
- 44 economies
  - 11 APEC economies
  + Malaysia (2018)
  + Thailand (2019)
- 22 Sectors
- 88000 observations per year
- 4 years: 2014-17
- 2018 to be published in January

OECD STRI composite index

- Puts numbers to the information in the regulatory database using a scoring and weighting system
  - Codified algorithm
  - Replicable
  - Independent of sample
- Takes values between 0 (open) and 1 (closed)
- A snapshot of trade restrictiveness for the economies and sectors included at a particular point in time
- A data visualisation tool as well as measure of relative restrictiveness

8

Extracting regulatory information

- Measures normally scheduled under the GATS and RTAs
- Related to future negotiations on rules in the WTO/GATS
- Ask stakeholders (business community, regulators, academics)
- Iterative process: Discussions and approval by participating economies

Cataloguing regulatory information

- By five policy areas
  - Restrictions on foreign entry
  - Restrictions to movement of people
  - Other discriminatory measures
  - Barriers to competition
  - Regulatory transparency
- By mode of supply
- Barriers to entry/limitations on operation
- Discriminatory/non-discriminatory

10

Quantifying regulatory information

- Assigning numbers to qualitative information
  - Binary scores (0 and 1)
  - Refinements:
    - Break complex or continuous measures into several thresholds
    - Construct hierarchies of measures/regulatory packages
    - Different market structure and regulatory regimes
  - Weighting:
    - Expert judgment
    - Online – experts asked to allocate 100 points among the five policy areas

11

STRI Annual Updates

- Keeping the STRI a "**living instrument**":
  - Updated database and indices every year
  - Capturing current and emerging barriers to services trade

- Keeping the STRI **relevant**:
  - Monitoring trade policy developments
  - Providing annual data for research and analysis

- Unique:
  - The STRI is the first of its kind to have comparable data for 4 consecutive years!

- Briefing note on policy trends in January each year

The OECD STRI suite of tools

Regulatory database

Compare economies

Policy simulator

Mobile application

Economy and **sector** notes
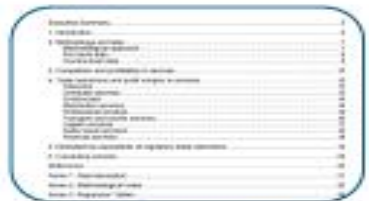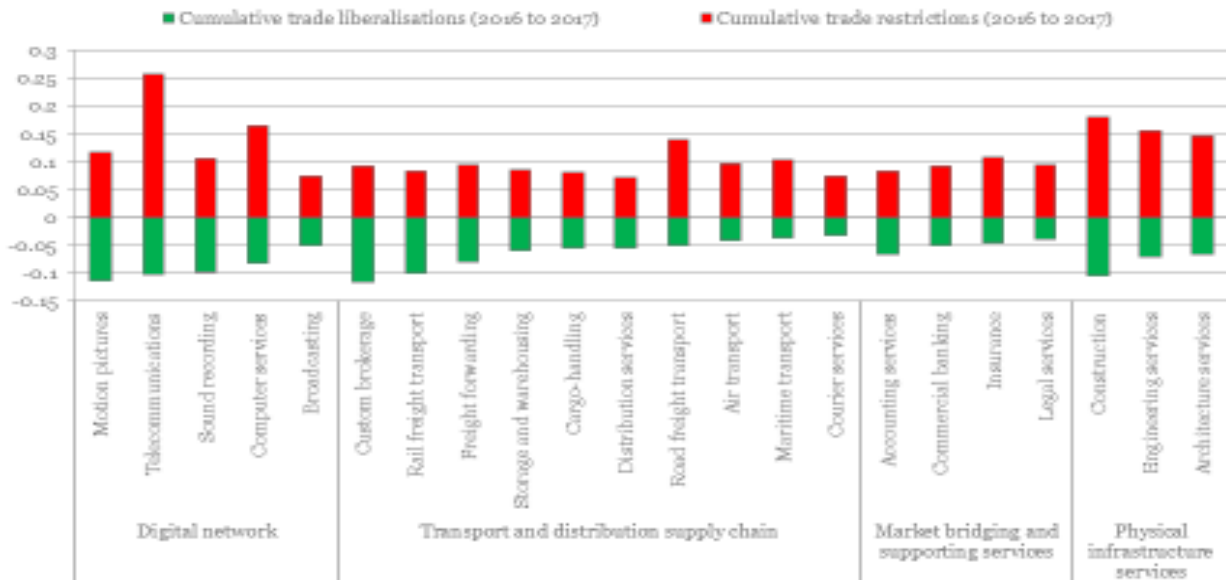
Research papers

Sectoral overview

STRI sector profiles (2017)
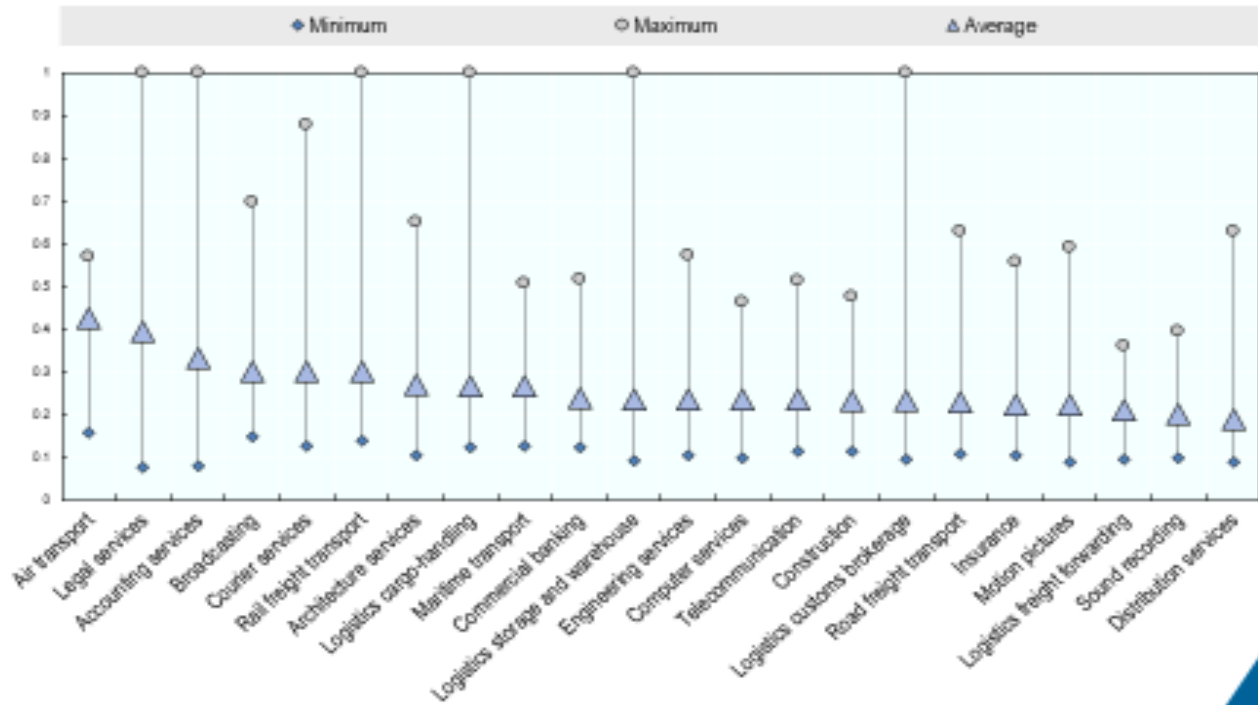
monitoring changes in the regulatory
environment for services

Impact of policy changes on the STRI results (2016-17)

- Cumulative trade liberalisations (2016 to 2017)
- Cumulative trade restrictions (2016 to 2017)

Digital network: Motion pictures, Telecommunications, Sound recording, Computer services, Broadcasting

Transport and distribution supply chain: Custom brokerage, Rail freight transport, Freight forwarding, Storage and warehousing, Cargo-handling, Distribution services, Road freight transport, Air transport, Maritime transport, Courier services

Market bridging and supporting services: Accounting services, Commercial banking, Insurance, Legal services

Physical infrastructure services: Construction, Engineering services, Architecture services

STRI applications

What can it be used for?

- Benchmark domestic reforms

- Identify regulatory bottlenecks and regulatory spillovers across sectors and policies

- Analyse how regulation shapes global value chains e.g. which activities are located in which economies

- Estimate ex ante the likely impact of reforms on industrial structure, employment, relative wages and welfare (e.g. using CGE model)

- Support regulatory cooperation across economies

Identifying bottleneck regulations

- STRI could be used for sectoral reform simulations and identifying bottleneck regulations for each sector for smart regulatory policy.

Expected STRI score for construction sector after reform

Legend:
- STRI
- Levelling conditions on CRC
- Transparency in GP
- Stay of Temp workers to 36m
- Easing licensing condition
- Visa and construction permit procedure
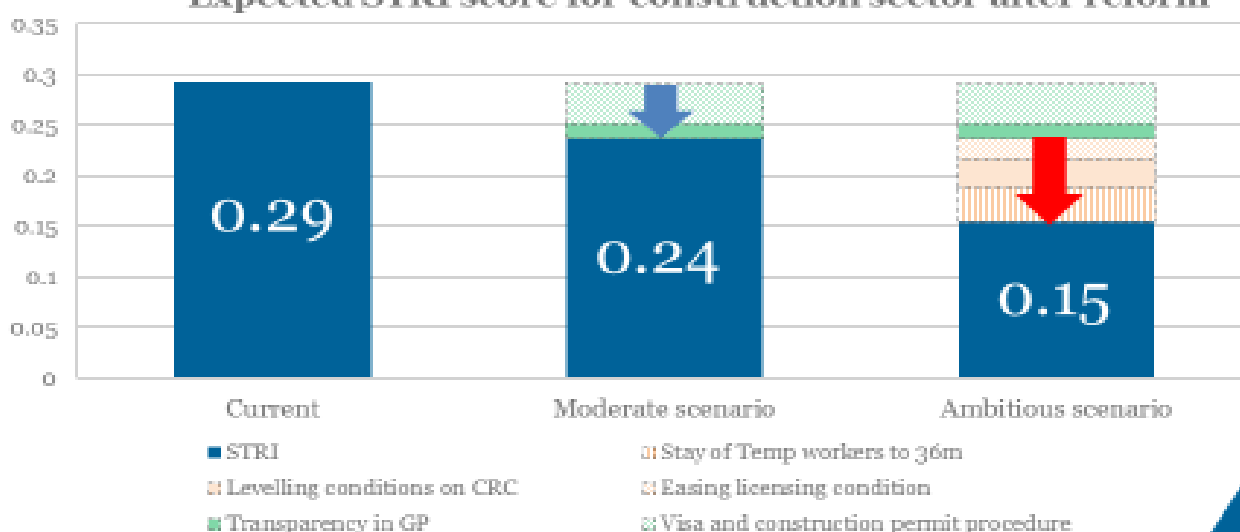
Services and entrepreneurship
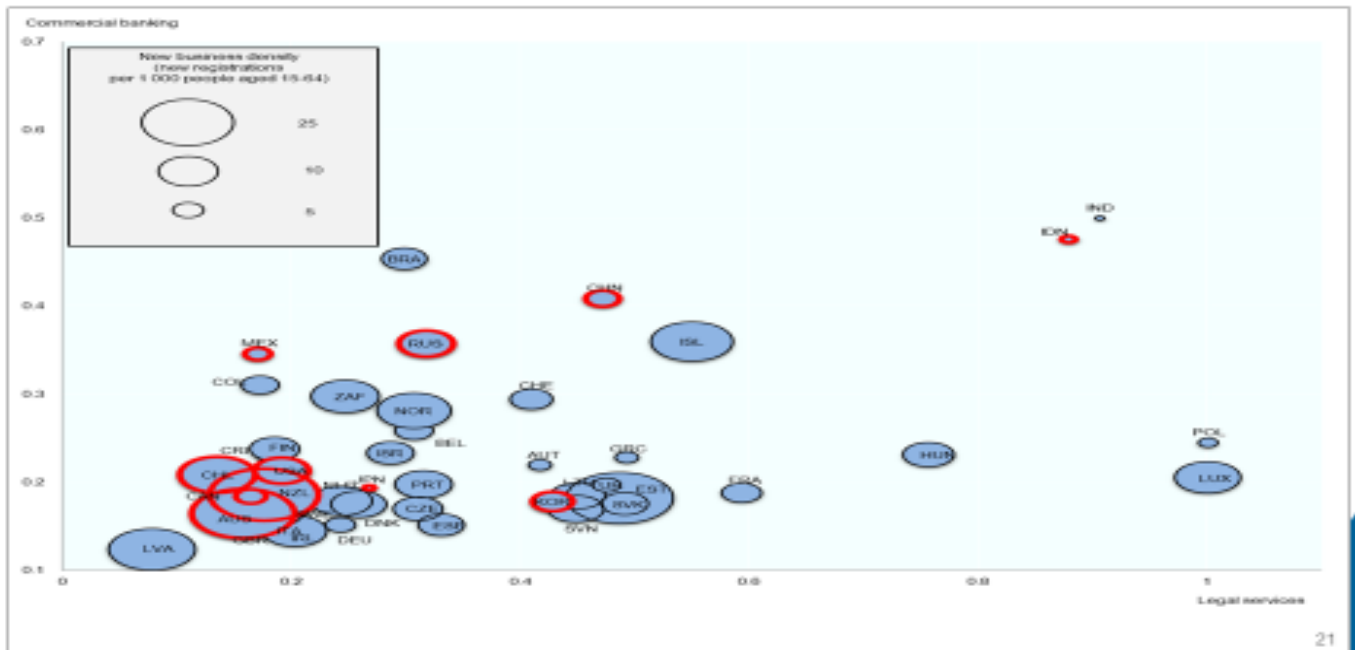
Services and regulatory coherence

The digital network
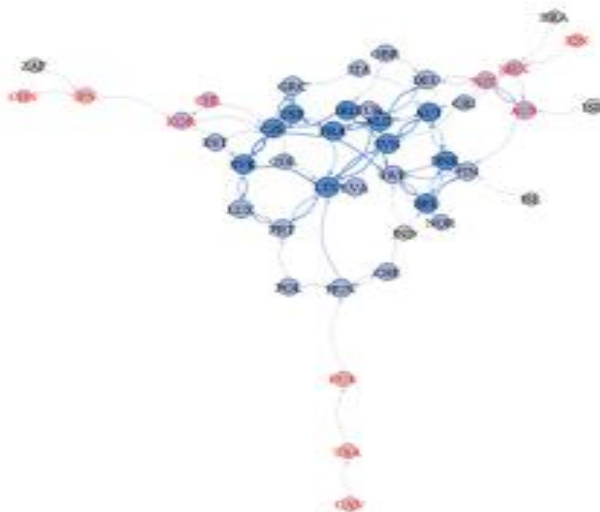
Market bridging and supporting services
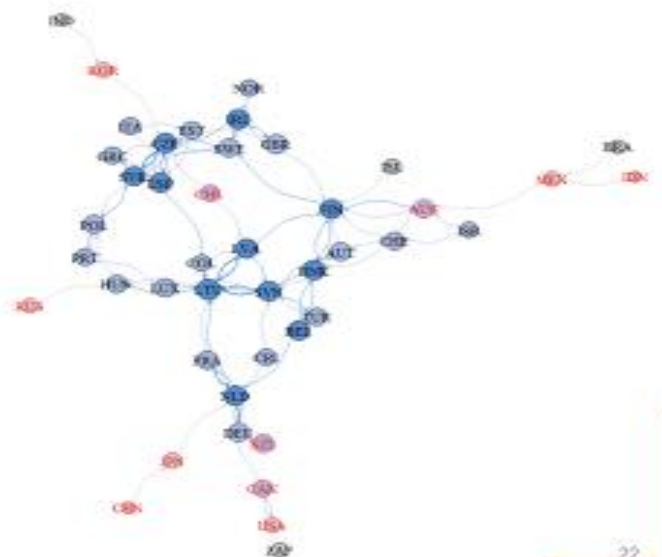
Trade restrictions translate into trade costs for firms

%

Average estimated **tax-equivalent** of services trade restrictions, by sector, 2014
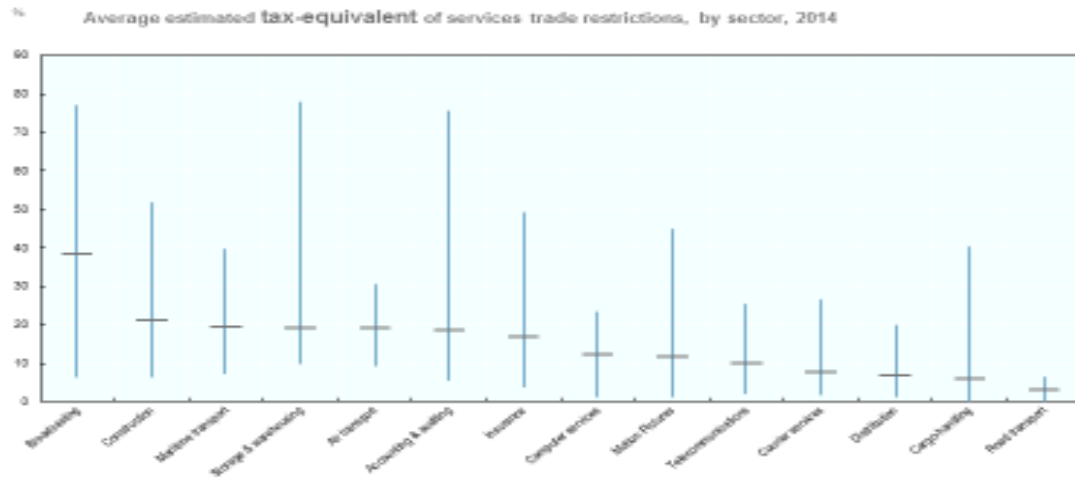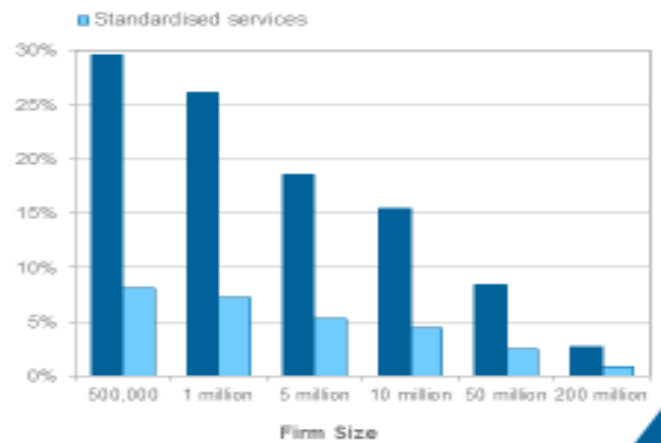
Services and SMEs

Additional trade cost of regulatory restrictions for SMEs

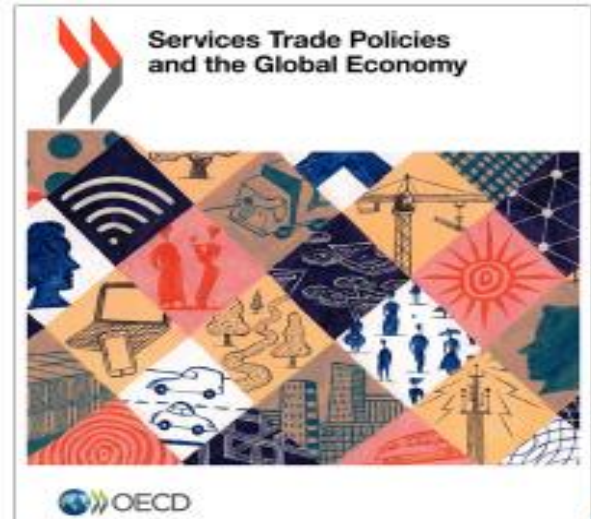Estimated additional tariff equivalent for SMEs compared to large firms of 400 million EUR or more

(a) On cross-border exports

(b) On foreign affiliate sales

■ Specialised services   ■ Standardised services

Firm Size

Firm Size

STRI synthesis publication

- The rise of services in the global economy
- The regulatory environment for services
- The benefits of open services markets
- Services trade and inclusive growth
- Accessible via [this link](#).

Services Trade Policies and the Global Economy

OECD

In the next session

- Demonstration of STRI tools with focus on selected sectors:
  - Professional services
  - Transport services
  - Telecommunication services

26

SESSION 3:

IMPROVING REGULATORY TRANSPARENCY AND PROMOTING POLICY REFORMS

Manila, 6 November 2018

Janos Ferencz
Trade in Services Division
OECD

OECD
BETTER POLICIES FOR BETTER LIVES

Objective

- To learn how to **use the STRI and its tools** to improve regulatory transparency and promote policy reforms

- How?
  - Interactive exercises using the existing STRI tools
  - Discussions
  - Group exercise

2

Accessing the OECD STRI data

3

The OECD STRI suite of tools

Regulatory database

Compare economies

Policy simulator

Mobile application

Economy and sector notes

Research papers

The OECD Statistics repository (OECD.Stat)

- Access OECD.Stat here: https://stats.oecd.org/

5

'Exercise 0': Download the data you need

- Access OECD.Stat here:
  https://stats.oecd.org/

- Select the parameters (sectors, economies, years, etc.)

- Download in Excel-readable format

Sectoral insights

Professional services in the STRI

Accounting & Auditing

Legal

Architecture

Engineering
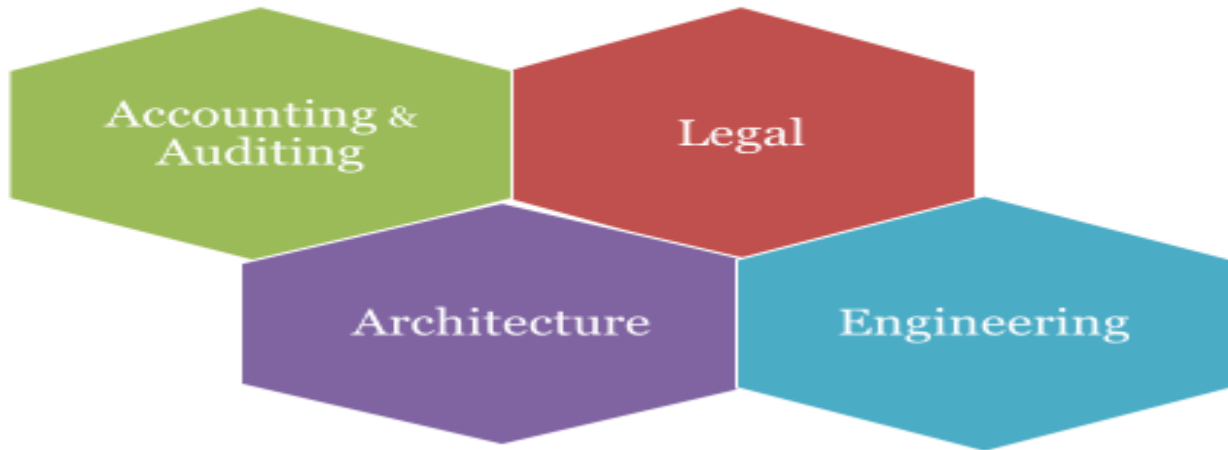
8

auditing/Accounting services

Characteristics of the sector

- Important players in international **trade and finance**
- Together with legal services, **important supportive activities** to other industries
- **Skilled labour** intensive sectors
- **Modes 3 and 4** are predominant

STRI Accounting/Auditing services, 2017

Legend: Restrictions on foreign entry | Restrictions to the movement of people | Other discriminatory measures | Barriers to competition | Regulatory transparency | Average | • STRI 2014

Countries: AUS, CAN, CHL, CHN, IDN, JPN, KOR, MEX, NZL, RUS, USA
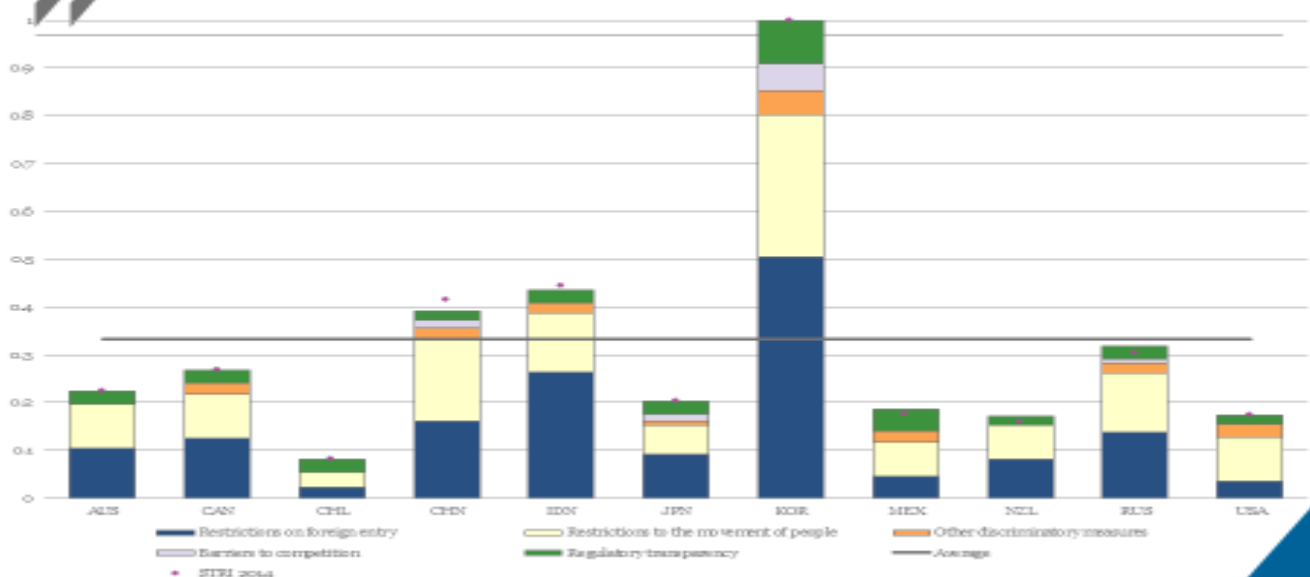
Most frequent restrictions

Restrictions on foreign entry

Equity restriction applying to not licensed individuals or firms	100	>50	<50	0
Auditing	6	1	31	6
Accounting	34	1	4	5

Requirements on board of directors	At least one		Majority	
	Aud.	Acc.	Aud.	Acc.
Licensed professional	38	11	35	10
Residents	16		9	
Citizens	2		2	

Most frequent restrictions

Restrictions to movement of people

Requirements for license to practice	Aud.	Acc.
Domicile	28	16
Prior or permanent residency	11	9
Citizenship	6	3

Requirements on foreign professionals	Aud.	Acc.
Local examination	24	11
At least one year of local practice	19	10
Re-do university degree, practice and exam	11	3

Exercise 1: Download the regulatory data

- Access the OECD Regulatory database here

LEGAL SERVICES

Characteristics of the sector

- Play an important role in **international trade and finance**

- **Qualification requirements** in these services are particularly stringent

- International law firms and lawyers typically enter foreign markets through a **commercial presence**

- **Business law and international law** are the most affected by international trade

  – **Foreign lawyers** for the most part provide advice in international law but domestic law is growing.

 – **Temporary licensing** (flying in and flying out)

Scope of legal services

- The definition of legal services in the WTO services classification (W/120 - CPC Prov. 861)

  – **Advisory** and **representation services** in several fields of law such as criminal and other than criminal

- Excluded from the STRI

  – Activities in relation to the **administration of public justice**

  – **Notaries**

- Distinction by type of practice: domestic and international law

  – Practice of international law is typically much less regulated

  – The distinction between criminal and other than criminal is not of relevance for the STRI

17

STRI Legal services, 2017
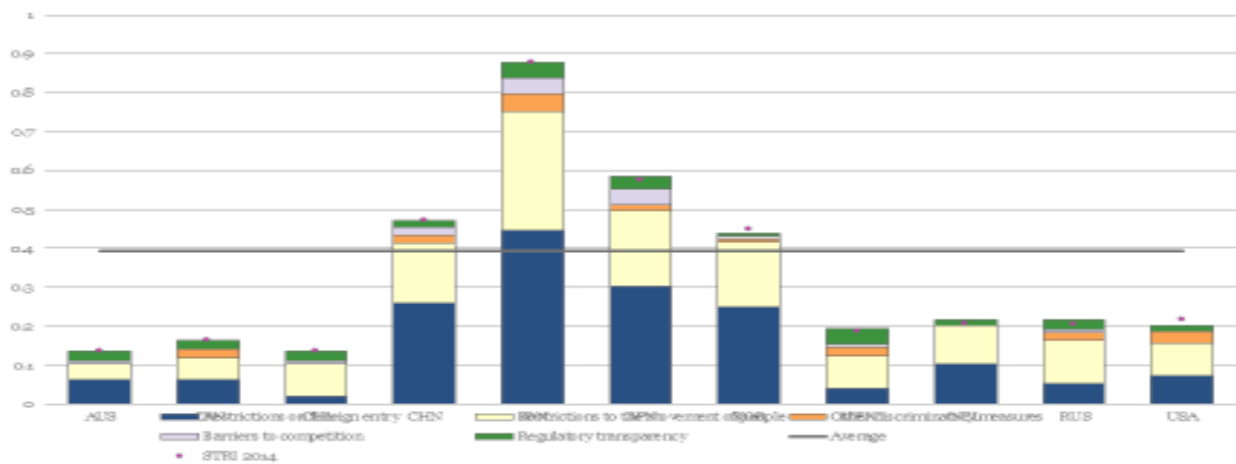
Combination of restrictions
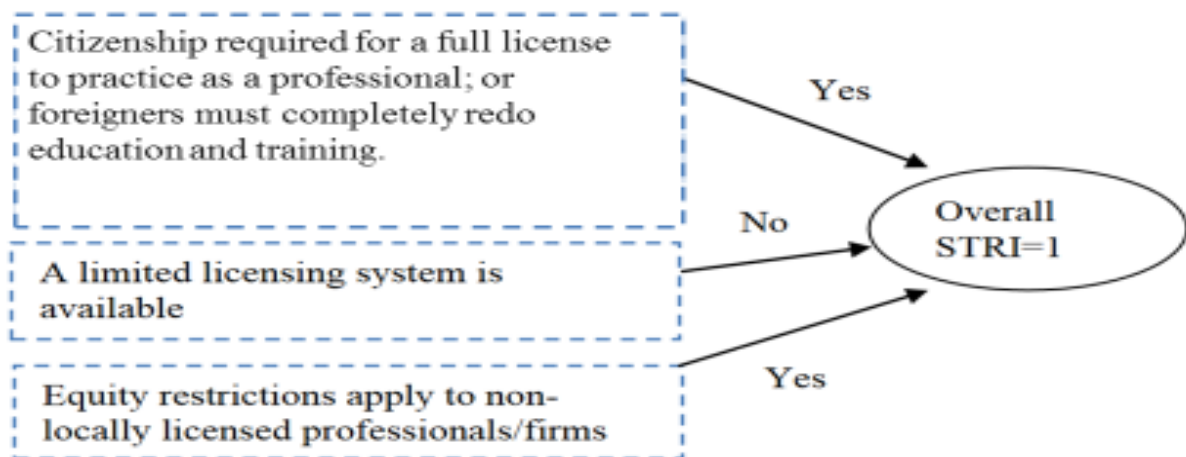
Common contributors: establishment

- **Equity restriction** applying to not licensed individuals or firms
  - Typically, equity ownership reserved to licensed professionals

- Requirements on **board members / equity partners**
  - Licensed professionals
  - Residents
  - Citizens

Common contributors: licensing requirements

Restrictions to movement of people

Requirements for licence to practice
Domicile
Prior or permanent residency
Citizenship

Requirements on foreign professionals
Local examination
At least one year of local practice
Re-do university degree, practice and exam

Exercise 2: The Policy Simulator

Access the OECD Policy Simulator here: http://sim.oecd.org

Transport services

MARITIME transport

Characteristics of the sector

- Maritime transport carried **over 80% of world merchandise trade volumes** (more than half in value terms)

- **Ship ownership** is highly concentrated in few countries : more than 50% of world tonnage is controlled by the top five ship-owning countries.

- Recent trends point to **higher market concentration** with larger ships and fewer companies

Definition and scope

- Maritime transport services **covered** in the STRI are :

  - Maritime freight transport

  - Pilotage, towing and tugging services

  - Other auxiliary services for maritime transport (*e.g.* maritime-related documentation, cargo-handling, etc.)

- **Excluded :**
  - Maritime passenger transport and Inland waterway transport
  - Land-locked countries are not covered in the STRI for maritime transport

OECD STRI Maritime freight transport services (2017)
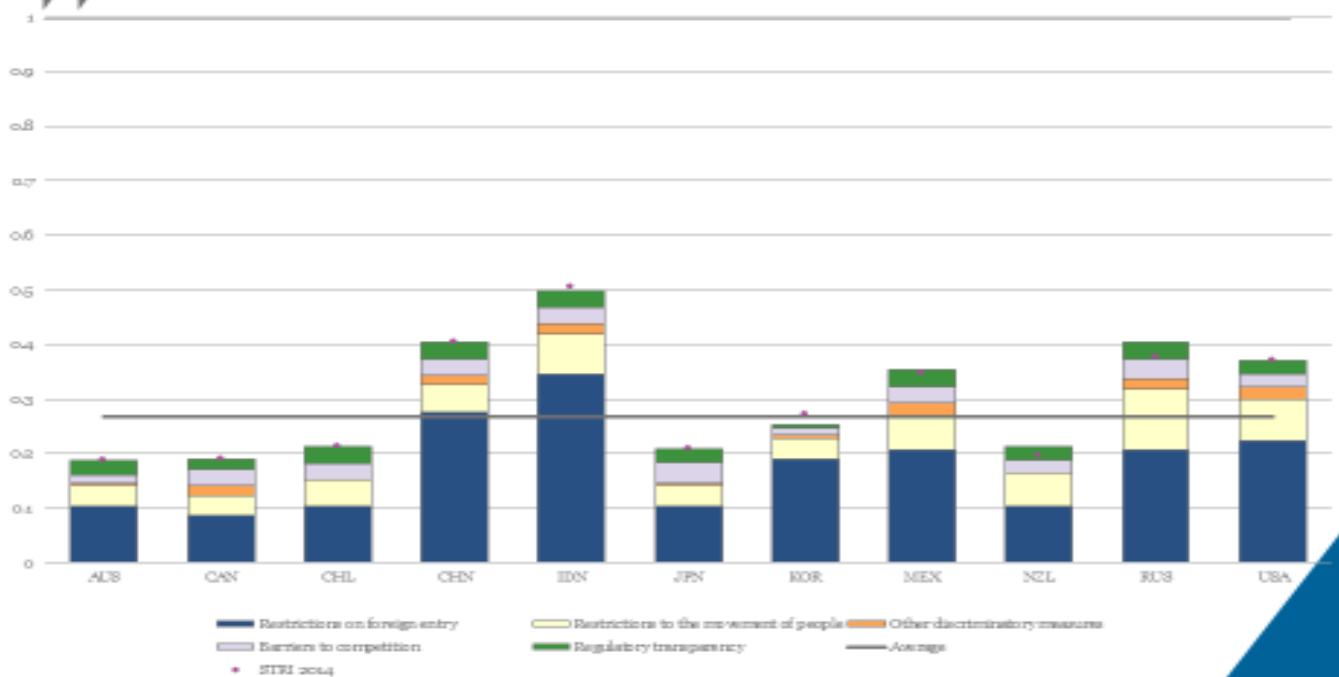
Most common sector-specific restrictions

Restrictions to foreign entry :

- Restrictions to vessel registration
- Foreign vessels are partially / fully excluded from cabotage

Other policy areas:

- Citizenship requirements on captains and crew manning vessels flying local flag
- Discriminatory tax relief measures or other incentives to domestic shipping companies
- Partial exemption of shipping agreements from competition law
- Obligatory use of local port agents
- Lengthy custom clearance procedures

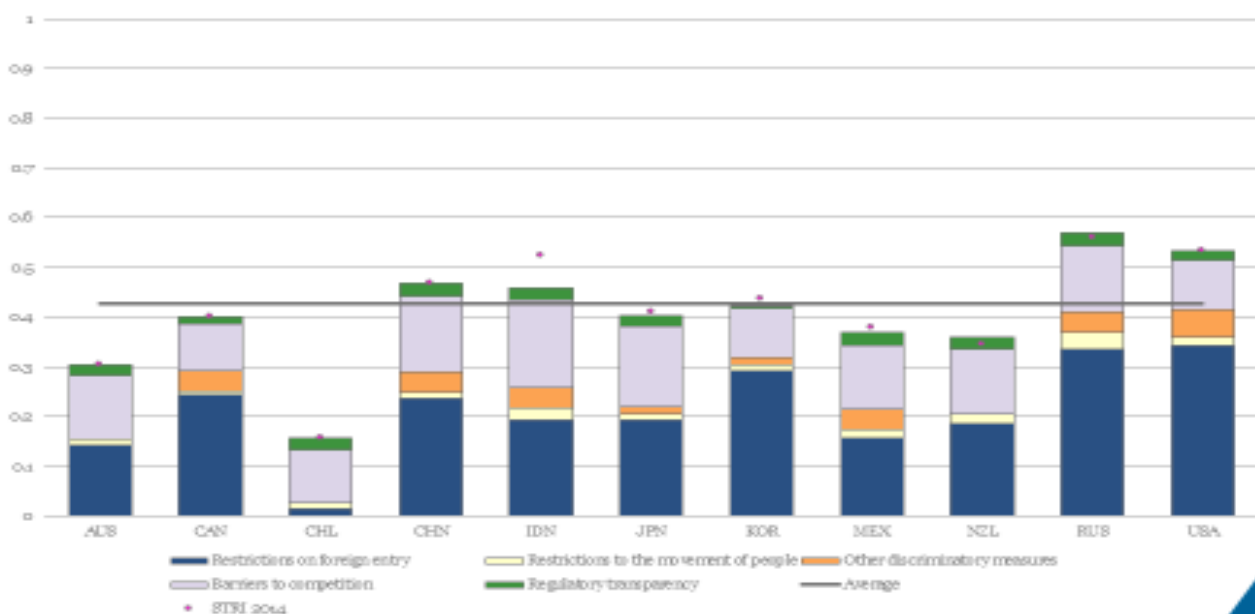# Air transport

Characteristics of the sector

- Important in its own right and an intermediate service for other kinds of trade

- One of the services sectors with the most sector-specific regulations

  - International market access is determined by bilateral and plurilateral agreements

  - Air carriers are also constrained by a range of domestic regulations

Definition and scope

- The STRI covers both passenger and freight & domestic and international traffic

    → Charter services are excluded

- The scope of the STRI at present is limited to commercial establishment and accompanying movement of people

- Cross-border trade (bilateral and plurilateral agreements) is not included at present

OECD STRI Air transport services (2017)

Legend:
- Restrictions on foreign entry
- Restrictions to the movement of people
- Other discriminatory measures
- Barriers to competition
- Regulatory transparency
- Average
- STRI 2014

Most common sector-specific restrictions

Restrictions split into: dom pas; dom car; int pas; int car;

Restrictions on foreign entry

- Foreign equity limit
- Citizenship of the board of directors
- Prior authorisation for wet and dry lease of aircrafts
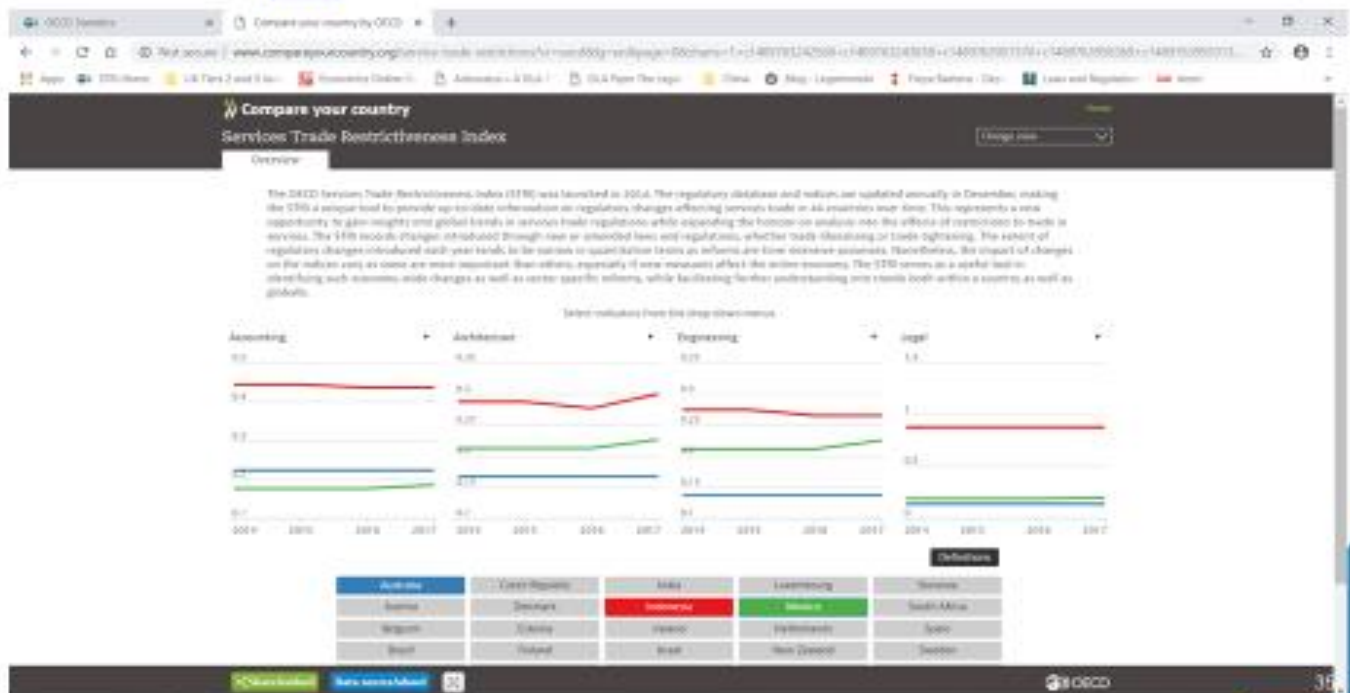
Barriers to competition

- Non competitive allocation (and trading) of airport take-off and landing slots:
  - Grandfathering & no commercial exchange of slots
  - New entrants – 50% of remaining slot pool after grandfathering

- Public ownership in aviation is still common, usually also restricting foreign ownership in these firms

Exercise 3: Trends

- Access link here

Telecommunications services
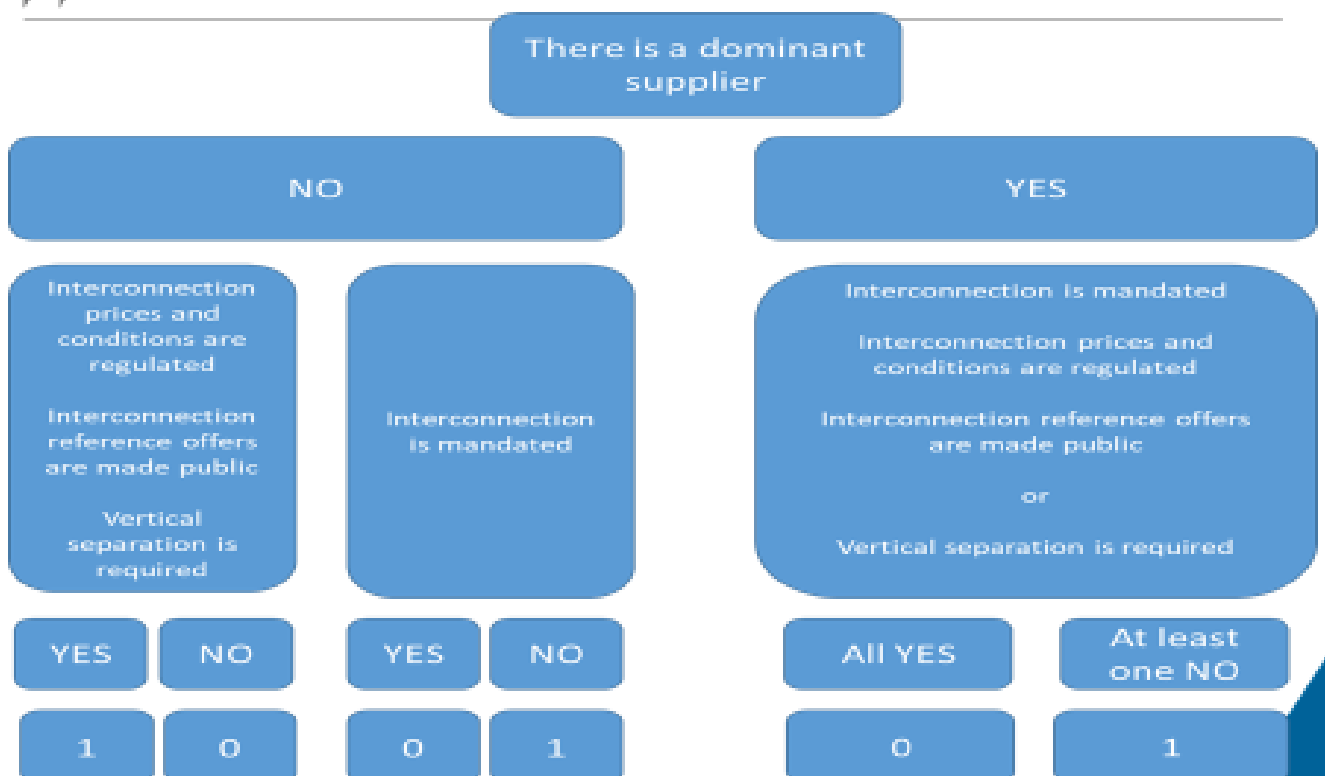
The role of pro-competitive regulation

- **Network industry**: regulation addressing **market failures** can be trade-enhancing

- **Barriers to competition** are considered in international trade agreements and the GATS (WTO Reference Paper on Basic Telecommunications)

- Best practice regulation:
  - **Ex ante regulation** imposed on suppliers with **significant market power**
  - Ex ante regulation rolled back when markets have become more competitive

- Often the law gives a framework and tools for the regulator to assess and regulate the market
  - Look at **what the regulator actually does**
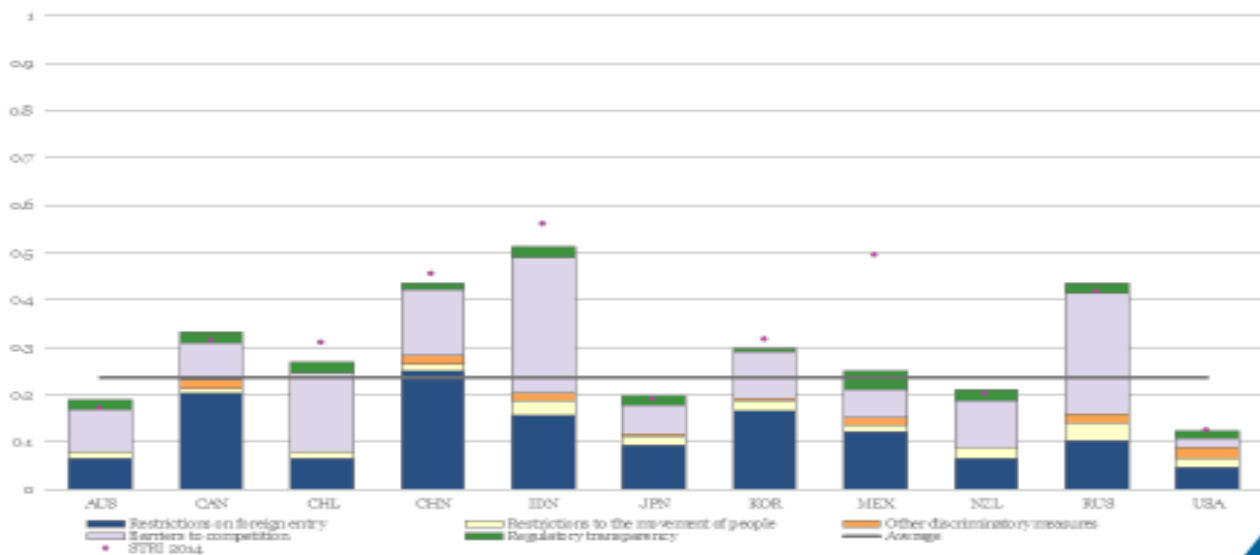
Scoring depending on market structure

Barriers to competition

- **Dominant supplier**
  - Regulation is good
- **Competitive markets**
  - Price regulation is bad

Example of scoring

There is a dominant supplier

NO

Interconnection prices and conditions are regulated

Interconnection reference offers are made public

Vertical separation is required

YES	NO
1	0

Interconnection is mandated

YES	NO
0	1

YES

Interconnection is mandated

Interconnection prices and conditions are regulated

Interconnection reference offers are made public

or

Vertical separation is required

All YES	At least one NO
0	1

39

STRI Telecommunications 2017

Exercise 4: The Policy Simulator

Access the OECD Policy Simulator here: http://sim.oecd.org

Main take-aways

- Overview of the STRI and its applications

- Deeper insights into five key services sectors

- Exercises to help make the most of the available STRI tools

42

Group exercise

- In small groups, pick any one of the tools we discussed today (e.g., simulator, regulatory database, trends comparator, etc.)

- Apply that tool to at least 2-3 economies to identify policy relevant information such as:
  - Which sectors have the fewest impediments and which sectors could benefit from further reforms?
  - How does the economy or economies you selected compare to other economies and key trading partners?
  - Where do regulatory bottleneck exists?
  - What policy reforms might lead to improvements? Which simulations lead to the highest reduction in the fewest possible changes?
  - What policy trends and developments can be observed?

- What main conclusions can be drawn from this exercise?

43

Thank you!

Janos.FERENCZ@oecd.org

Contact us

We look forward to hearing from you!

Access all of the information from the Trade & Agriculture Directorate at:

www.oecd.org/tad

You can reach us via e-mail by sending your message to the following address:

tad.contact@oecd.org

We invite you to connect with us on Twitter by following:

@OECDtrade