

平成 30 年度アジア太平洋地域シンポジウム

Asia-Pacific Forum 2018

Protecting the Global Trading System and the Role for Multilateralism

報 告 書

2018 年 11 月 22 日（木）～23 日（金）

（インド ニューデリー 開催）

一般財団法人 国際経済交流財団



競輪の補助事業

この事業は、競輪の補助を受けて実施しました。

<http://hojo.keirin-autorace.or.jp>

平成 30 年度アジア太平洋地域シンポジウム

< 1 日目 > 公開シンポジウム 11月22日 (木)



開会の辞 日下一正 JEF 会長



開会の辞 Sachin Chaturvedi RIS 所長



基調講演 Preeti Saran 元 MEA 事務次官



会場の様子



質疑応答



セッション 1



セッション2



セッション3



閉会の辞



Chaturvedi 所長/日下会長

< 2日目> 非公開ラウンドテーブル・ディスカッション 11月23日(金)



会場の様子



ディスカッションの様子



ディスカッションの様子



ディスカッションの様子

目 次

1.	開 催 趣 旨	1
2.	開 催 概 要	2
3.	詳 細 日 程	3
4.	出 席 者	6
5.	略 歴	7
6.	議 事 要 旨	
	日 本 語	20
	英 語	38
7.	発 表 資 料	60
8.	若手研究者の参加報告	124
9.	公開シンポジウム アンケート集計報告	131
10.	成 果	136
11.	共催団体紹介	140
12.	事 務 局	141

1. 開催趣旨

国際経済交流財団は、我が国企業の国際競争力に資するため、更なる成長が期待され重要な市場であるアジア太平洋地域について、持続的経済成長への貢献、またビジネス制度の共通化・標準化の点で重要な地域経済統合を推進するという観点から、アジア太平洋地域のシンクタンクや大学等と共に議論を重ねている。

本事業は、アジア太平洋地域で指導的役割を果たしている政財界、官界、学界における有識者が一堂に会し、豊富な経験に基づき同地域におけるこれらの課題の解決に向けて、率直な意見交換を行い、相互の交流および理解を深めると共に、我が国をはじめ参加各国での政策立案に資することを目的としている。

2003 年シンガポールで第 1 回を開催して以来、昨年度（2017 年）はフィリピン・マニラにおいて 16 回目、今年度（2018 年）はインド・ニューデリーにて **Research and Information System for Developing Countries: RIS** との共催で、メインテーマ「世界貿易体制と多国間主義の役割を保護する（Protecting the Global Trading System and the Role for Multilateralism）」の下、3つのセッションを設け、公開シンポジウム、および非公開ラウンドテーブル・ディスカッションを開催した。

セッション 1

貿易と新たな技術

(Trade and New Technology)

セッション 2

地域統合に向けての必須要件：サービスセクターの増大する役割

(Imperatives for Regional Integration: Growing Role of Service Sector)

セッション 3

インド太平洋地域における SDGs の重要性と役割：SDGs 達成のための戦略

(Importance and Roles of SDGs in the Indo-Pacific Region: Strategies for Attainment of SDGs)

なお、本事業は競輪の補助を受けて実施した。

2. 開催概要

1. 開催日時：2018 年 11 月 22 日（木）13:00-17:55 公開フォーラム
2018 年 11 月 23 日（金）09:00-12:00 非公開ラウンドテーブル・ディスカッション
2. 開催場所：インド ニューデリー
会場 Silver Oak Hall, India Habitat Center, New Delhi
3. 主催者：
＜日本側＞
一般財団法人国際経済交流財団／Japan Economic Foundation (JEF)
＜インド側＞
開発途上国研究リサーチ情報システムセンター
Research and Information System for Developing Countries (RIS)
4. テーマ：
世界貿易体制と多国間主義の役割を保護する
Protecting the Global Trading System and the Role for Multilateralism

セッション 1
貿易と新たな技術
(Trade and New Technology)

セッション 2
地域統合に向けての必須要件：サービスセクターの増大する役割
(Imperatives for Regional Integration: Growing Role of Service Sector)

セッション 3
インド太平洋地域における SDGs の重要性と役割：SDGs 達成のための戦略
(Importance and Roles of SDGs in the Indo-Pacific Region: Strategies for Attainment of SDGs)
5. 出席者：日本、インド、アジア太平洋地域（計 12 の国・地域）から計 20 名
6. 形式：＜1 日目＞公開フォーラム（聴衆：110 名）
＜2 日目＞非公開ラウンドテーブル・ディスカッション
7. 使用言語：英語

3. 詳細日程



RIS
Research and Information System
for Developing Countries
विकासशील देशों की अनुसंधान एवं सूचना प्रणाली

Asia-Pacific Forum 2018

Public Symposium on Protecting the Global Trading System and the Role for Multilateralism November 22 (Thur.), 2018

Silver Oak Hall, Indian Habitat Center, New Delhi

12:00 – 13:00	Registration
13:00 – 13:15	Welcome remarks by <ul style="list-style-type: none"> • Mr. Kazumasa Kusaka, Chairman and CEO, JEF • Prof. Sachin Chaturvedi, Director General, RIS
13:15 – 13:35	Keynote address: Ms. Preeti Saran , Formerly Secretary (East), Ministry of External Affairs (MEA), India
13:35 – 13:45	Photo session
13:45 – 14:55	<i>Panel Session 1: Trade and New Technology</i>
	Session Chair and Moderator: Amb. Amar Sinha , Distinguished Fellow, RIS Panelists: <ul style="list-style-type: none"> • Dr. Man-Jung Mignonne Chan, Chair and CEO, Out-of-the Box Consultancy • Datuk Seri Jayasiri Jayasena, Former Secretary General, Ministry of International Trade and Industry (MITI), Malaysia • Amb. Murray McLean AO, Chairman, Dunmore McLean Pty Ltd. • Prof. Simon Tay, Chairman, Singapore Institute of International Affairs (SIIA) • Mr. Nuttawut Laksanapanyakul, Consultant, Thailand Development Research Institute (TDRI)
14:55 – 15:10	Coffee Break
15:10 – 16:25	<i>Panel Session 2: Imperatives for Regional Integration: Growing Role of Service Sector</i>
	Session Chair and Moderator: Mr. Naoyuki Haraoka , Executive

	<p>Managing Director, JEF</p> <p>Panelists:</p> <ul style="list-style-type: none"> • Prof. Choong-Yong Ahn, Professor Emeritus, College of Business and Economics, Chung-Ang University (CAU) • Prof. Prabir De, Professor, RIS and Coordinator, ASEAN-India Center at RIS • Prof. Gary Hawke, Emeritus Professor, Victoria University of Wellington(VUW) • Ms. Anita Prakash, Director General for Policy Relations, Economic Research Institute for ASEAN and East Asia (ERIA) • Prof. Shujiro Urata, Dean and Professor, Graduate School of Asia-Pacific Studies (GSAPS), Waseda University • Prof. Zhang Jianping, Director General, Center for Regional Economic Cooperation, Chinese Academy of International Trade and Economic Cooperation (CAITEC), MOFCOM
16:25 – 16:40	Coffee Break
16:40 – 17:45	<i>Panel Session 3: Importance and Roles of SDGs in the Indo-Pacific Region: Strategies for Attainment of SDGs</i>
	<p>Session Chair and Moderator: Prof. Sachin Chaturvedi, Director General, RIS</p> <p>Panelists:</p> <ul style="list-style-type: none"> • Dr. Yose Rizal Damuri, Head of Department of Economics, Center for Strategic and International Studies (CSIS) • Dr. Tri Thanh Vo, Economist, Central Institute for Economic Management (CIEM) • Dr. Josef Yap, Professorial Lecturer, University of the Philippines School of Economics (UPSE) • Prof. Saikat Sinha Roy, Professor JadHAVpur University, Kolkata
17:45 – 17:55	<i>Closing Remarks:</i>
	<ul style="list-style-type: none"> • Prof. Sachin Chaturvedi, Director General, RIS • Mr. Kazumasa Kusaka, Chairman and CEO, JEF

November 23 (Fri.), 2018
Juniper Hall, 1st floor
Indian Habitat Center, New Delhi

Day 2: Private Roundtable Discussion

09:00 – 09:05	Welcome remarks Mr. Kazumasa Kusaka
09:05 – 10:20	Roundtable discussion Chair and Moderator: Prof. Sachin Chaturvedi
10:20 – 10:40	Coffee break
10:40 – 11:55	Roundtable discussion continued Chair and Moderator: Mr. Kazumasa Kusaka
11:55 – 12:00	Closing remarks Prof. Sachin Chaturvedi
12:00 – 13:00	Farewell luncheon (hosted by RIS and JEF) Venue: Juniper Hall

4. 出席者

(氏名アルファベット順/20 名)

- Dr. Choong-Yong Ahn , Professor Emeritus , College of Business and Economics , Chung-Ang University (CAU)
- Dr. Man-jung Mignonne Chan, Chair and CEO, Out-of-the-Box Consultancy
- Prof. Sachin Chaturvedi, Director General, Research and Information System for Developing Countries (RIS)
- Dr. Yose Rizal Damuri, Head of Department of Economics, Center for Strategic and International Studies (CSIS)
- Dr. Prabir De, Professor, RIS and Coordinator, ASEAN-India Centre at RIS
- Mr. Naoyuki Haraoka, Executive Managing Director, Japan Economic Foundation (JEF)
- Prof. Gray Hawke, Emeritus Professor, Victoria University of Wellington (VUW)
- Datuk Seri Jayasiri Jayasena, Former Secretary General, Ministry of International Trade and Industry (MITI), Malaysia.
- Mr. Kazumasa Kusaka, Chairman and CEO, Japan Economic Foundation (JEF)
- Mr. Nuttawut Laksanapanyakul, Consultant, Thailand Development Research Institute (TDRI)
- Amb. Murray McLean AO, Chairman, Dunmore McLean Pty Ltd.
- Ms. Anita Prakash, Director General for Policy Relations, Economic Research Institute for ASEAN and East Asia (ERIA)
- Prof. Saikat Sinha Roy, Professor, Jadavpur University, Kolkata
- Ms. Preeti Saran, Formerly Secretary (East), Ministry of External Affairs (MEA)
- Amb. Amar Sinha, Distinguished Fellow, Research and Information System for Developing Countries (RIS)
- Prof. Simon Tay, Chairman, Singapore Institute of International Affairs (SIIA)
- Prof. Shujiro Urata, Dean and Professor of, Graduate School of Asia-Pacific Studies, (GSAPS) Waseda University
- Dr. Vo Tri Thanh, Economist, Central Institute for Economic Management (CIEM)
- Dr. Josef Yap, Professorial Lecturer, University of the Philippines School of Economics (UPSE)
- Dr. Zhang Jianping, Director General, Center for Regional Economic Cooperation, Chinese Academy of International Trade and Economic Cooperation (CAITEC), MOFCOM

Observer

- Ms. Sachiko Hirakawa, Associate Professor, Center for International and Lecturer, Graduate School of Asia-Pacific Studies (GSAPS), Waseda University.

5. 略歷



CHOONG-YONG AHN

Professor Emeritus, College of Business and Economics, Chung-Ang University (CAU)

Dr. Ahn is currently Distinguished Professor, Graduate School of International Studies, Chung-Ang University. Previously, he was the Chairman, Korea Commission for Corporate Partnership (KCCP: 2014-2018) and responsible

for inducing voluntary collaborations between Korea's big businesses and SMEs, and also Chairman of the Board, Korea Electric Power Corporation. Before taking his current post, he served as Foreign Investment Ombudsman (2006-2014) who is the troubleshooter responsible for resolving grievances raised by foreign investors at the Korea Trade and Investment Promotion Agency in Korea. He is former Chairman of the Presidential Regulatory Reform Committee (2010-2012). While on sabbatical from Chung-Ang University, he also served several posts such as the President of the Korea Institute for International Economic Policy (2002-2005); Chair of the APEC Economic Committee(2002-2005); Chair of Board, Choheung Bank; consultant to the World Bank; UNIDO Chief Technical Advisor to the Economic Planning Unit of Malaysia to design Malaysia's industrial master plan; and served as President of several academic societies in Korea including the Korea International Economics Association, Korean Association of Trade and Industry Studies, and the Korea Econometric Society. Dr. Ahn's honors include the Economist of the Year Award from the Maeil Business Daily Newspaper in Korea, the Okita Policy Research Award by the National Institute for Research Advancement in Japan for his publication on "Modern East Asian Economy," and Free Economy Publication Award by the Federation of Korean Industries. Since receiving his Ph.D. from Ohio State University, Dr. Ahn has published many articles in international journals including Review of Economics and Statistics, European Economic Review, Japanese Economic Review, Journal of Asian Economics and Monograph papers in North-Holland, Cambridge University Press, Springer and Edward Elgar, etc.



MAN-JUNG MIGNONNE CHAN

Chair and CEO, Out-of-the Box Consultancy

Dr. Mignonne Man-jung CHAN has extensive experience in academia, government, business, and media. She is Founder & CEO of Out-of-the-Box Consultancy, and sits in many Boards, including Commissioner of the KMT Party Review & Disciplinary Commission, Board Member of the National Policy Research Foundation, Independent Non-Executive Director of Standard Chartered Bank (Taiwan), Executive Board Member of Association of Emerging Market Studies, Association of Strategic Environmental Resources, and the Sino-U.S. Economic & Cultural Association. In addition, she is also commissioned as Senior Advisor to the Legislative Yuan. Dr. Chan currently also serves as Advisor to Chinese Taipei APEC Study Center, and Advisor to the Chinese Cyan Geese Peace Education Foundation. She is also coaching negotiation regularly at public and private institutions. Dr. Chan used to serve as KMT Member of the Parliament at-Large and sat as Chair of the Judicial Committee in 2016. She was Senior Adviser to President Ma Ying-Jeou at the National Security Council of ROC 2008~2010, Director General of International Secretariat of Pacific Economic Cooperation Council (PECC) 1999~2001; Director (Research) at the International Secretariat of Asia-Pacific Cooperation Council (APEC) 1996~1999, and Chief of Staff at the APEC Business Advisory Council (ABAC). In addition, she used to serve as Research Associate at the Harvard University Negotiation Roundtable—a consortium organized by Schools of Law, Business, and Government. She also served as Research Associate at the Christian Science Monitor TV.

Education

Ph.D., Political Economy, Boston University, USA

Research Fields

National Security, International Organizations, Global Governance, International Political Economy, Business & Government Relations, Regional Economic Integration, Global Business Environment, Cross-Taiwan-Strait Relations, Negotiation Theories & Practices, and International Parliamentary Procedure.



SACHIN CHATURVEDI

Director General, RIS

Prof. Sachin Chaturvedi is Director General at the Research and Information System for Developing Countries (RIS), a New Delhi-based Think-tank. He was Global Justice Fellow at the MacMillan Center for International Affairs at Yale University.

He has done his Ph.D. in Economics on 'India-Singapore Trade Relations' from Ambedkar University. He works on issues related to development economics, involving development finance, SDGs and South-South Cooperation. He has also worked on trade, investment and innovation linkages with special focus on WTO. He has authored/edited 10 books, apart from contributing chapters in edited volumes and publishing several research articles in various prestigious journals. He has served as a Visiting Professor at the Jawaharlal Nehru University (JNU). He has been a Developing Country Fellow at the University of Amsterdam (1966), Visiting Fellow at the Institute of Advanced Studies, Shimla (2003), and Visiting Scholar at the German Development Institute (2007). He is on the Editorial Advisory Board of IDS Bulletin, Sussex, UK.



YOSE RIZAL DAMURI

Head of Department of Economics, Center for Strategic and International Studies (CSIS)

Yose Rizal Damuri is the Head of the Department of Economics, Centre for Strategic and International Studies. His research activities focus on international trade, regional integration and globalization of value chain. Yose has been teaching International Economics courses in the Department of Economics University of Indonesia for many years. He is active in many networks of research institutes in East Asia region, such as in Asia Pacific Research Network on Trade (ARTNet) and ERIA Research Institute Network (ERIA-RIN). Currently he serves as the Co-Chair of Indonesia National Committee of Pacific Economic Cooperation (INCPEC). Yose is active in many policy forum including as the Research Coordinator of Indonesia Service Dialogue, a forum dedicated for the development of services sector in Indonesia. He also helps the Indonesian government as an Advisor to Indonesian Trade Negotiating Team. He received his PhD in International Economics from the Graduate Institute of International Studies, Geneva, Switzerland.

- Ph.D. in International Economics from the Graduate Institute of International Studies, Geneva, Switzerland
- Head of the Department of Economics, Centre for Strategic and International

Studies

- Lecturer at the *Fakultas Ekonomi dan Bisnis, Universitas Indonesia*
- Founder of Indonesia Services Dialogue (ISD)
- Co-chair of Indonesia National Committee of Pacific Economic Council (INCPEC)



PRABIR DE

Professor, RIS and Coordinator, ASEAN-India Centre at RIS
Dr. Prabir De is a Professor at the Research and Information System for Developing Countries (RIS), New Delhi. He is also Coordinator of the ASEAN-India Centre (AIC) at RIS. Dr. De works in the field of international economics and has

research interests in international trade and development. He was a Visiting Fellow of the Institute of Developing Economies (IDE-JETRO), Chiba, Asian Development Bank Institute (ADB), Tokyo; and Visiting Senior Fellow of United Nations Economic and Social Commission for Asia and the Pacific (UNESCAP), Bangkok. He has been conducting policy research. De has a Ph.D. in Economics from the Jadavpur University, Kolkata. He has contributed several research papers in international journals and written books on trade and development. His recent edited books include *Celebrating the Third Decade and Beyond*; New



NAOYUKI HARAOKA

Executive Managing Director, JEF

Naoyuki Haraoka has been Executive Managing Director of Japan Economic Foundation (JEF) since 2007. After graduating the University of Tokyo in 1978 (Bachelor of Economics), he joined MITI (Ministry of International Trade and Industry) of Japanese government. Having been posted in the industrial policy section and the international trade policy section for a few years, he was enrolled in a two year MPA (Master of Public Administration) programme at Woodrow Wilson School of Princeton University in the US on a Japanese government sponsorship. After having acquired MPA at Princeton, he rejoined MITI in 1984 as an economist. Since then he had been posted as Deputy Director and Director of a number of MITI divisions including Research Division of International Trade Policy Bureau. He was also posted in Paris twice, firstly, Principal Economist of Trade Bureau of OECD (Organization of Economic Cooperation and Development) from 1988 to 92 and secondly Counselor to Japanese

Delegation of OECD from 1996 to 99. After coming back to MITI from his second stay in Paris, at the occasion of the government structural reform in 2001 when MITI was remodeled as METI (Ministry of Economy Trade and Industry) he joined the efforts to found METI research institute, Research Institute of Economy Trade and Industry as its Director of Administration. He became Chief Executive Director of JETRO San Francisco in 2003 and stayed in San Francisco until 2006. He was Director-General of METI Training Institute from 2006 until July, 2007 when he left METI permanently.



GARY HAWKE

Emeritus Professor, Victoria University of Wellington (VUW)

Gary Hawke was Head of the School of Government and Professor of Economic History at Victoria University of Wellington. He held visiting appointments at Stanford University, All Souls' College, Oxford, the Australian National University and a number of institutions in Japan. He is a Fellow of the Royal Society of New Zealand, Distinguished Fellow of the NZ Association of Economists and Fellow of the Institute of Public Administration of New Zealand. He is a Companion of the New Zealand Order of Merit. He consults for government on education policy. As Director of the Institute of Policy Studies from 1987 to 1998, the projects for which he was responsible included relations among Australia, New Zealand and the United States and New Zealand's position in the Asia-Pacific region. He is a member of the board of the New Zealand Committee of the Pacific Economic Co-operation Council, NZPECC, a member of the Academic Advisory Council of the Economic Research Institute for ASEAN and East Asia and represents NZ Institute for Economic Research on its Research Institutes Network. He is now Emeritus Professor, Victoria University of Wellington, and Senior Fellow, NZ Institute of Economic Research.



DATUK SERI JAYASIRI JAYASENA

Former Secretary General, Ministry of International Trade and Industry (MITI), Malaysia

J.Jayasiri is the former Secretary General of the Ministry of International Trade and Industry, Malaysia. He joined the civil service in December 1981 as Assistant Secretary of International Affairs, Ministry of Primary Industries dealing

with international commodity issues. He later assumed the post of First Secretary/Counsellor in the Permanent Mission of Malaysia in Geneva from 1988 to 1997 representing Malaysia in the Uruguay Round of negotiations to establish the WTO. He returned to MITI in 1997 and served in various positions. He was Malaysia's Senior Official to APEC from 2002 – 2006. He assumed the post of Deputy Secretary-General, MITI, in charge of strategy and monitoring in January 2015 before serving as the Secretary-General from July 2016 until his mandatory retirement from civil service in May 2018. Throughout his career, he represented Malaysia in numerous international meetings and trade negotiations. He led Malaysia's team in the ASEAN-China FTA, Malaysia-Japan FTA, the TPPA and CPTPP negotiations. He was also deeply involved in many industry related issues and led the High-Level Task Force on the way forward for Malaysia to embrace Industry 4.0.



KAZUMASA KUSAKA

Chairman and CEO, JEF

Kazumasa Kusaka has been Chairman and CEO of the Japan Economic Foundation (JEF) since April 1, 2013, and is also a Professor at University of Tokyo Graduate School of Public Policy. He previously served for 36 years in Japan's Ministry of International Trade and Industry (MITI), rising to become vice-minister for international affairs in the reorganized Ministry of Economy, Trade and Industry (METI) in 2004. During his long career in public service, Kusaka was seconded to the International Energy Agency (IEA)/OECD and was Japan's senior official for Asia-Pacific Economic Cooperation (APEC). He played a central role in Asia's economic integration, promoting FTAs in the region as well as serving as a senior official negotiating the Doha development agenda of the WTO. He was head of Japan's Energy Agency and held director-general positions in technology and environmental policy in addition to trade and investment-related areas within METI. He was also instrumental in finalizing the Kyoto Protocol, and developing Japan's energy and environment policies. Among many other posts Kusaka has held are Special Adviser to the Prime Minister on Global Warming, senior vice president of Mitsubishi Electric, executive adviser to Dentsu Inc., and president of the Japan Cooperation Center for the Middle East.



NUTTAWUT LAKSANAPANYAKUL

Consultant, Thailand Development Research Institute (TDRI)

Mr. Nuttawut Laksanapanyakul is a consultant at Thailand Development Research Institute (TDRI), a leading public policy think tank in Thailand. His expertise lies in the area of international trade, regional connectivity, and industrial policies. He has regularly written reports and disseminated key messages to policy makers and the general public through meetings, seminars, and media on the topics of current interest, for examples, preference utilization by Thai exporters and importers under the existing free trade agreements and how to boost it up, ASEAN integrated and seamless connectivity and trade facilitation, upgrading Thai industries and their participation in the ASEAN production network in an era of increasing protectionism, showcases of innovation in Thailand, and roles and capabilities of selected research, development, and innovation funding agencies and business promotion agencies in boosting up technology investment in Thailand. Graduated from the faculty of engineering, he has a passion for the advancement of technology and its impacts on individuals, organizations, localities, nations, and even the globe. During the recent years, he has got a chance to work for Oxfam, a worldwide non-government organization, where he has been motivated to gear himself up for the interconnectedness relationships among technology, inequality, and social movement for the vulnerable.



MURRAY MCLEAN AO

Chairman, Dunmore McLean Pty Ltd.

Murray McLean is Chair, Australia Japan Foundation (since 2012); Chair, Foundation of Australian and Japanese Studies (NPO); and Chairman of his family company, Dunmore McLean Pty Ltd. He was a Vice Chancellor's Professorial Fellow at Monash University (2012 to 2015) and a non-resident Fellow at the Lowy Institute 2014-2016. Formerly a senior officer of the Australian Department of Foreign Affairs and Trade (DFAT), he retired in 2012 after a 42 year career culminating in his role as Ambassador to Japan (2004-2011) initiating negotiations on the Japan/Australia EPA and on growing security cooperation as well as leading Australia's response to the earthquake, tsunami and nuclear disasters of 2011. Prior to that role, he served as Deputy Secretary of DFAT (2004); First Assistant Secretary, North Asia Division (2001-2003), High

Commissioner to Singapore (1997-2001); Assistant Secretary, East Asia Branch, (1992-1996), and Consul General, Shanghai (1987-1992). His other DFAT postings were at the Australian Embassy in Washington D.C. (1983-1986); the Australian Embassy in Beijing (twice) (1973-1976 and 1979-1983) and in Hong Kong (1971-1973). He speaks fluent Chinese. In DFAT, he was consistently involved in the formulation of Australian policy towards Asia and also served as a special ministerial envoy on North Korean nuclear matters visiting North Korea on several occasions. He was appointed as an officer of the Order of Australia (AO) in the Australia Day Honours list 2013 and in November 2014, the Japanese Emperor presented him with the Grand Cordon of the Order of the Rising Sun.



ANITA PRAKASH

Director General for Policy Relations, Economic Research Institute for ASEAN and EastAsia (ERIA)

Anita Prakash is Director General (Policy Design Department) at the Economic Research Institute communication for Leaders and senior officials in the governments of Southeast Asia, East Asia and Oceania, and Europe, trade negotiations, political economy, inclusive growth, regional economic architecture, connectivity, and economic and technical cooperation. She works closely with ASEAN Member states, the East Asia Summit (EAS) countries in the Asia Pacific Region, and also their counterparts in Europe, and now increasingly in Africa, in their bilateral and multilateral relations. Her policy writings cover economic development and cooperation issues in South East, East Asia and India, and between Asia, Europe and Africa. She has worked extensively on the trade agreements in Asia Pacific and EU, economic and technical cooperation for the least developed countries in ASEAN, and economic and political architecture in East Asia. Her current work covers Asia's connectivity with Europe and Africa, and the new initiatives from emerging economies for multilateral governance. She edited the 'Asia Europe Connectivity Vision 2025' for the ASEM Summit in Mongolia in June, 2016. She is developing the study for 'Asia Africa Growth Corridor', and presented its concept report to the Africa Development Bank Annual Meeting in India, in May 2017. She is also developing the 'Brussels Report for Strengthening Asia Europe Connectivity' for the ASEM Summit in October 2018, in Brussels. In International Affairs, her focus is on developing new value chains for multilateral governance, which are inclusive and sustainable and deliver regional and local results. She is presently a Visiting Research Associate at the Graduate Institute of International

and Development Studies, Geneva.



Prof. Saikat Sinha Roy

Professor, Jadavpur University, Kolkata

Current Employment: Dr. Saikat Sinha Roy is presently a Professor at Department of Economics and Joint Director, School of International Relations and Strategic Studies (SIRSS) at Jadavpur University, Kolkata.

Past experience: He previously served as a Joint Director, Trade Related Research Capacity Building Project of UNCTAD-India at the Department of Economics, Jadavpur University, Kolkata from November 2007-2009. From July 2009 – September 2009, he was also a British Academy Visiting Research Fellow at the Department of Economics, Lancaster University Management School, Lancaster University, UK. In addition to this, he was previously a faculty member at Research and Information System for Developing Countries (RIS) between 1996 and 2002, and again in 2005. He also served as an Assistant Research Coordinator in Asian Development Bank, India Resident Mission during 2002 and 2005 and as a Guest Faculty at the Department of Economics, Calcutta University teaching Open Economy Macroeconomics since 2005. He is also a Guest Faculty at Presidency College Calcutta during 2005 and 2006 teaching Time Series Econometrics.

Education: Prof. Roy holds a Ph. D. in Economics from Centre for Development Studies, Trivandrum, INDIA (affiliated to Jawaharlal Nehru University, New Delhi) and M. Phil. in Applied Economics from Centre for Development Studies, Trivandrum, India (affiliated to Jawaharlal Nehru University, New Delhi). He completed his M. Sc. (Economics) from Calcutta University, Kolkata, INDIA and B. Sc. (Economics Honours) from Calcutta University, Kolkata, INDIA in 1986.

Publications and Paper Presented:

He is the author of International Trade and International Finance: Explorations on Contemporary Issues, New Delhi: Springer India (2016) and Trade Regimes and India's Exports (forthcoming) in addition to various publications in reputed journals and edited volumes.



PREETI SARAN

Formerly Secretary (East), Ministry of External Affairs(MEA), India

Ms.Preeti Saran joined the Indian Foreign Service(IFS)in 1982,and has spent a career spanning 36 years as a professional diplomat, serving overseas as well as in India.

Her overseas assignments include the Indian Embassies in Russia, Bangladesh,Egypt and Geneva. Between 2008 to 2013, she served as India's Consul General in Toronto,Canada, after which she was appointed as India's Ambassador to Vietnam between 2013 to 2016. At the Ministry of External Affairs in New Delhi, Mrs.Saran has served in diverse positions, including in the Indian Council of Cultural Relations and in the North America and East Asia Divisions. She was Joint Secretary (Director General) of the SAARC Division between 2005to2007 and later Joint Secretary (Director General) of the Northern Division handling relations with Nepal and Bhutan. In February2016,Mrs.Saran was appointed as Secretary(East),(Vice Foreign Minister) in the Ministry of External Affairs,where she served till her superannuation in September 2018. Ms.Saran has been a senior member of Indian delegations to several bilateral and multilateral events,including at the Summit Level.Most recently,she represented India as Sherpa/SOM leader at the BRICS Summit (Xiamen, September 2017), BIMSTEC Summit, ASEAN-India Annual Summits,East Asia Summit, ASEAN Regional Forum and the Mekong-Ganga Cooperation mechanism.She played an active role in the organization of major multilateral/international events such as the BRICS-BIMSTEC Outreach Summit in Goa in 2016;ASEAN-India Commemorative Summit in Delhi in 2017;11th World Hindi Conference in Mauritius in 2018 and the 9th and 10th editions of the ASEAN-India Delhi Dialogue in 2017 and 2018 During her assignment in Geneva between 2002 to 2005, Mrs.Saran was extensively dealing with UN Organisations/ specialized agencies such as the WIPO, UNCTAD,South Centre and all economic matters on behalf of the Permanent Mission of India.



SIMON TAY

Chairman, Singapore Institute of International Affairs (SIIA)

Simon SC Tay is a public intellectual as well as an advisor to major corporations and policy-makers. He is Chairman of the Singapore Institute of International Affairs, the country's oldest think tank. The SIIA's work focuses on the politics, economic policies and sustainability issues that matter to corporations and policy makers. The SIIA is ranked by an international survey as a leading think tank in ASEAN and Asia, and has advised the Indonesian and Myanmar governments on foreign investment. He is concurrently a tenured Associate Professor, teaching international law at the National University of Singapore Faculty of Law. He has also taught at Harvard Law School, the Fletcher School and Yale University. His book, *Asia Alone: the Dangerous Post Crisis Divide from America* (Wiley 2010) was well reviewed in the *Economist* and *Financial Times*. His comments and interviews feature in the international and regional media, including the BBC, CNN, Bloomberg, NHK Japan and CCTV. Prof Tay is also Senior Consultant at WongPartnership, a leading Asian law firm of some 300 lawyers and with offices in ASEAN, China and the Middle East. He serves on boards for global companies including MUFG Bank of Japan and was previously Corporate Advisor to Temasek Holdings (2006-09). He has spoken at leading business conferences including the World Economic Forum, APEC CEO Summits and SIBOS, and briefed major corporate boards and financial institutions. From 1992 to 2008, he served in a number of public appointments for Singapore including as Chairman of the National Environment Agency (2002-08); an independent Member of Parliament (1997-2001); and to coordinate the country's equivalent of the Peace Corps (1990-93). In 2006, Prof Tay received a National Day Award. He continues to serve Singapore in a number of roles including as an Expert and Eminent Person in the ASEAN Regional Forum, and on Climate Change.



SHUJIRO URATA

Dean and Professor, Graduate School of Asia-Pacific Studies (GSAPS), Waseda University

Shujiro Urata is Dean and Professor of Economics at Graduate School Asia-Pacific Studies, Waseda University. He is also Specially Appointed Fellow at the Japanese Centre for Economic Research (JCER), Faculty Fellow at the Research Institute of Economy, Trade & Industry (RIETI),

and Senior Research Adviser for the Executive Director of the Economic Research Institute for ASEAN and East Asia (ERIA) in Jakarta. Professor Urata received his B.A. in Economics from Keio University in 1973 and his M.A. and Ph.D. in Economics at Stanford University in 1976 and 1978. He is a former Research Associate at the Brookings Institution, an Economist at the World Bank. He specializes in International Economics and Economics of Development. He has held a number of research and advisory positions including senior advisor to the Government of Indonesia, consultant to the World Bank, OECD, the Asian Development Bank and the Government of Japan. He published and edited a number of books on international economic issues and is an author and co-author of numerous articles in professional journals. His book publications in English include *Multinationals and Economic Growth in East Asia*, co-editor, Routledge, 2006, *Free Trade Agreements in the Asia-Pacific*, co-editor, World Scientific, 2010, *Economic Consequences of Globalization: Evidence from East Asia*, co-editor, Routledge, 2012, and others.



TRI THANH VO

Economist, Central Institute for Economic Management (CIEM)

Dr. Vo Tri Thanh is currently senior expert of the Central Institute for Economic Management (CIEM). He is also Chairman of Vietnam National Committee for Pacific Economic Cooperation (VNCPEC). He holds a Bachelor of Science from the Moscow State University, and a Master degree in Economics and a PhD degree in Economics both from the Australian National University. Dr. Vo Tri Thanh mainly undertakes research and provides consultation on issues related to trade liberalization and international economic integration and macroeconomic policies. His other areas of interests include institutional reforms, financial system and economic development.



JOSEF YAP

Professorial Lecturer, University of the Philippines School of Economics (UPSE)

Josef T. Yap was President of the Philippine Institute for Development Studies, where he worked for 26 years until his retirement on June 30, 2013. While at PIDS, he specialized in macroeconomic policy and applied econometrics. Dr. Yap

finished his undergraduate and doctoral studies at the University of the Philippines Diliman and went to the University of Pennsylvania on a post-graduate program. In 2010, Dr. Yap was honored as one of the 100 outstanding alumni of the UP Diliman College of Engineering as part of its Centennial celebration. His current research interest centers on regional economic integration in East Asia. Dr. Yap was the regional coordinator of the East Asian Development Network and was actively involved in the establishment of the Economic Research Institute for ASEAN and East Asia (ERIA). He is co-author of the books *The Philippine Economy: East Asia's Stray Cat? Structure, Finance and Adjustment* and *Lessons from Nationalist Struggle: The Life of Emmanuel Quiason Yap*. At present, Dr. Yap is a Professorial Lecturer at the University of the Philippines School of Economics.



ZHANG JIANPING

Director General, Center for Regional Economic
Cooperation, Chinese

Academy of International Trade and Economic Cooperation
(CAITEC), MOFCOM

Prof. Zhang Jianping is the Director General, Center for Regional Economic Cooperation and the Director General, Institute for Western Asia and Africa, Chinese Academy of International Trade and Economic Cooperation, MOFCOM. He is also the Vice President of China's Research Association of Social and Economic System, and the PhD adviser of the University of International Business and Economics, the member of China National committee of PECC, China Council for the Promotion of International Trade, Chinese People's Institute of Foreign Affairs and Chinese Association for international Understanding, the commentator of CCTV, Phoenix TV, CRI and CNR. He specializes in International Economics. He has chaired more than 60 study projects and offered international consultancy many times for UN, WB, ADB, APEC, DAVOS and so on including consultancy for the Vice Premier of Russia on 2012 APEC Agenda. Invited by the State Council information office of the PRC he had introduced the Belt and Road Initiative to the media circle and in 2015 and BRICS in 2017. He presented in ICTSD, CSIS, Adam Smith, ADBI and so on many times. More than 100 papers and 4 books have been published. He has awarded the third-class academic prizes of Ministry Level five times and the first-class prizes (2008-2010) in Chinese Academy of Macro Economics Research three times. He obtained the Bachelor Degree and the Master Degree in Science from Peking University, PhD in Economics from Chinese Academy of Social Sciences. He was also the post doctor of National information Center, China.

6. 議事要旨

(日本語)

以下の日本語サマリーは、インドの開発途上国研究情報システムセンター（RIS）が作成した英文サマリーを当財団で仮訳したものである。

平成30年度アジア太平洋地域シンポジウム（公開シンポジウム）

世界貿易体制と多国間主義の役割を保護する

はじめに

ニューデリーの開発途上国研究情報システムセンター（RIS）は国際経済交流財団（JEF）と協力し、2018年11月22日 - 23日にデリーのインド・ハビタットセンターにてアジア太平洋地域シンポジウム（Asia-Pacific Forum: APF2018）を共同開催しました。APF2018の主要イベントは「世界貿易体制と多国間主義の役割を保護する」をテーマとして2018年11月22日に行われた公開シンポジウムで、「貿易と新たな技術」、「地域統合に向けての必須要件：サービスセクターの増大する役割」、「インド太平洋地域におけるSDGsの重要性と役割：SDGs達成のための戦略」に焦点を当てた3つのパネルセッションにて構成されました。アジア太平洋地域シンポジウムには、アジア太平洋地域の上級・著名エコノミスト、専門家および政策立案者の20名が参加しました。さらには、著名な学者、現役・退役外交官、政策立案者・策定者、主題専門家、業界のリーダー、メディア関係者の参加者が110名以上、加えて、2週間にわたる「南南協力を学ぶ」に関する研究プログラムに出席した21カ国の ITEC パートナー諸国から高級官僚その他の29名が参加しました。公開シンポジウムでの基調演説は、インド対外関係省の元事務次官（東地域）で著名な本職外交官のプリーティ・サラン大使が行いました。

本会議は、かつてないほどの保護主義の台頭と、ルールに基づく多国間世界貿易体制の存続に対する脅威を背景として企画されました。これにより、世界経済に非常に深刻な影響が及んで国際的な貿易量が激減し、特に発展途上国で失業が蔓延する可能性があります。よって、アジア太平洋地域の平和と繁栄を推進するためには、国際社会によって多国間主義とグローバル化が防御および促進されることが必要不可欠となります。また、世界を舞台にした新たな技術の出現が新しい機会や課題をもたらしています。この状況にもアジア太平洋地域全体の観点から効果的に取り組む必要があります。会議では、持続可能な開発目標（SDGs）を目指すことの世界規模の重要性と、アジア太平洋地域を含んだ、国や地域、世界の経済のさまざまなセクターとの連携について討議されました。さらに、ASEAN地域の国内総生産（GDP）の70%以上に寄与するサービスセクターも注目を集めました。アジア太平洋地域の貿易と投資に関するサービスセクター指向の需要

の波とは別に、討議中には、物品の貿易を促進する特に物流や輸送、財務、コミュニケーションなどのセクターにてサービスの専門化と分断化の領域を提供する、グローバル・バリュー・チェーンの役割と重要性も明らかにされました。

2018年アジア太平洋地域シンポジウム（APF）は、同地域の既存の課題と新たな課題について討議する素晴らしい機会を提供し、今後に向けて幅広い選択肢をもたらしました。本レポートは、アジア太平洋地域の関係者コミュニティの利益のために、APF2018公開シンポジウムの著名なスピーカーとパネリストが述べた主な見解を紹介しています。

開会の挨拶

サチン・チャトゥルヴェディ

開発途上国研究情報システムセンター（RIS）所長

APF2018にご来場のすべての皆さんを、心から歓迎いたします。本シンポジウムは非常に重要な取り組みの1つです。JEF会長の日下 一正さんが、その役割と重要性について皆さんにお話くださるものと思います。

皆さんもご存知かと思いますが、RISは、進化し続けるインド太平洋イニシアティブのさまざまな側面にて数多くの活動を行ってまいりました。そうした重要な課題への取り組みの一環として、RIS内にASEANインドセンターを設置しています。RISのASEANとの協調は、インドがASEANと分野別対話のパートナーシップを開始した1992年に遡ります。それ以来RISは、関連する重大な問題について我々の総体的理解を統合するために、数々の研究とプロジェクトを実施してきました。アジア太平洋地域やルックイースト政策に対する関与の意義を探索するインドの取り組みは、滞ることなく続いています。現政権は発足後すぐにインドのアクトイースト政策を発表しました。RISがASEANインドセンターを設置し、インドとASEAN加盟諸国との貿易、投資および技術協力に関する経験ベースの分析に必要な影響力をもたらしたのは、2013年の今頃の時期でした。

友人である皆さんも同意いただけると思いますが、皆が準備を整えているなか、今まさに「アジアの世紀」に突入しようとしています。それは「誰も置き去りにしない」環境づくりのための持続可能な開発目標（SDGs）への集団的なコミットメントの一環として、ほぼすべての国々が団結する歴史的にも重要な時期の到来です。幸か不幸か、アジアの精神や価値、新しいアプローチを結集することで、この地球をより包括的な視点でとらえるという極めて重要な役割をASEAN諸国が果たすことになりそうな地政学的状況も出現しています。こうした状況は、APFが討議すべき正しい方向性を導くものであると、私は考えます。

多くの国からの参加者がここに集結したことをとても嬉しく思います。更に今回はRISが、インド対外関係省による発展途上国の能力開発に向けての代表的な能力開発プログラムである、ITEC プログラムを主催する機会でもあります。本プログラムでは、世界のさまざまな場所から集まった外交官や学者、政府当局者などがRISを訪れ、「南南協力を学ぶ」についての2週間にわたるコースに参加します。22カ国からの32名の参加者が

このイベントのために集まることは、この上なく素晴らしい機会です。参加者はラテンアメリカ、アフリカおよびアジアの方々です。

RIS は本シンポジウムの創設メンバーであり、この3年間は連続してこのイベントに参加してきました。こうした重要なイニシアティブによって我々は、明確な政策策定には絶対欠かせない、関連する諸問題についての理解を深めることができるものと確信しております。

日下 一正

国際経済交流財団（JEF）会長

ご紹介いただきました国際経済交流財団の会長の日下一正でございます。

プリーティ・サラン大使、共催者である開発途上国研究情報システムセンター（RIS）のサチン・チャトゥルヴェディ所長、アジア太平洋地域からお集まりの専門家の方々、本日ここでご挨拶の機会を得ましたこと、誠に光栄です。

さて、私共の国際経済交流財団（Japan Economic Foundation: JEF）は、地域ごとの持続可能な発展を目標に、アジア・米国・欧州各地でフォーラムやダイアログを開催しています。それぞれが持続的な発展を遂げる上での制約要因を取りあげ、それらの解決策を模索し、それぞれの政策の成功と失敗から相互に学びあうことを中心的な課題としています。

この Asia Pacific Forum は第1回を 2003 年にシンガポールにおいてスタートしましたが、アジア太平洋地域における経済成長の実態を把握しつつ、障壁を取り除き、また、FTA が持続的な経済成長の鍵となるという時代となったという信念のもと、その推進を目標としてきました。この FTAこそ、目覚ましい経済発展を遂げているこの地域の特性にあった制度であります。そして今回は 17 回目の年次会合となります。

今回の開催地インドは、ソフトウェア産業に加え、IT、ロボティックス、“make-in-India（メイク・イン・インディア）”政策を推進し、モディ首相のイニシアティブの下“Ease of Doing Business（ビジネス環境改善）”のランキングが大幅に改善しました。自由な貿易と投資、そして第4次産業革命を語るに最も適したところです。今回当シンポジウムの共催を引き受けてくれた RIS に改めて感謝申し上げます。

さて、2003 年の第1回目から今日までの間に、議論は、当地域の統合の中心的役割を担っている ASEAN 内の経済統合の進展とも歩調をあわせ、関税などの国境措置から **behind the border measures** と呼ばれる国内制度やその運用にも広がりました。これらの真の自由化は国内の生活、社会、産業に主要な影響を与えます。そして、より一層の安定性、また政治的、社会的な更なる発展を獲得するためには、一方での発展が、他方では、国民や地域へのネガティブな影響もある、ということを踏まえ、どのような政策が考えられるかという見地から、それぞれの国、地域がどのようにこれらについて取り組んでいるか、メンバーから相互に学ぶことができました。

当地域では、アメリカが離脱した TPP も、TPP11 として 12 月 30 日に発効することになりました。また、RCEP の交渉は合意に向けて、山頂が見えてからの登山と同じように、最も困難な政治的リーダーシップを必要とする時期を迎えています。

一方、欧米では、すべては **globalize** されたが、例外は **consent** だという表現に的確に代表されるように、所得・資産格差の拡大、或いは望まない人の移動の元凶はグローバリゼーションだとして、有権者の“**consent**”の拒否という反乱が続き、民主国家においては政治のリーダーシップがその大きな動きに振り回されるという現象を引き起こしてきました。地域経済統合のモデルと考えられていた EU から英国が離脱、更には、EU 域内の他の国々における EU の結束を弱める動きがそれであり、米国も“米国第一主義”といった保護主義に陥っています。

しかし、失業者が増えることはグローバリゼーションの所為なののでしょうか？確かに、グローバリゼーションの制度的側面である FTA による自由な貿易及び投資により、**parts and components** は **global value chain** の中で世界各地から集まって来ます。しかし、どの国においても、工場ではたくさんの人々が働いています。それとも、AI やロボット化による技術革新が社会的大変革を引き起こしているのでしょうか？

第一次産業革命はラッドライト運動により、保守的な人々との対立がありました。しかし、歴史的な技術革新は経済の発展、それに伴う雇用の創出ももたらしました。そして、第 4 次産業革命は、そのスピードと規模においてこれまでの産業革命と異なるのでしょうか？

しかし、我々アジア太平洋地域は今なお、ダイナミックな成長の中心に位置しています。グローバリゼーションや第 4 次産業革命がもたらす影の部分は、自由貿易や投資を通じて経済成長へと吸収されていく要素があると考えます。

そのようになれば、国粋主義や保護主義のもとで自由貿易を促進、維持していく機関が必要となってくるでしょう。また、総括的な成長を遂げることを目的としたグローバリゼーションや産業革命を構築していくことが必要となります。

より深い統合的なアプローチが各国や地域の自国経済、社会、政治に影響を及ぼします。各国において、所得、資産格差の拡大にはどめをかけることで、社会的、政治的な安定を図っていくことは、経済統合を進めていく上で急務の課題です。好むか、好まざるかに関わらず、グローバリゼーションは加速し、我々は第 4 次産業革命による貧困や格差問題に向き合う必要があります、新しい国内社会制度を追求していかなければなりません。

この“**Better Globalization**”の構築が、今、各国に求められています。

この地域の成長戦略を成功に導くためには、我々がお互いに協力し、メガ FTA を推進していく必要があります。米国のリーダーシップが“当分の間入院状態”にある間に、我々地域間で自由貿易を促進し、経済統合への歩みを進めていくべきです。

本日のフォーラムがこの地域の絆をさらに強固にし、経済統合の推進、経済の持続的発展に貢献することを祈念して、開会挨拶とさせていただきます。ご清聴ありがとうございました。

アマル・シンハ

開発途上国研究情報システムセンター (RIS) 名誉フェロー

アマル・シンハ大使は、自身が重要な社会的な起業家精神の試みと考えるインド、ラジャスタンのベアフットカレッジの経験について話しました。技術の独占や技術的知識は、技術の学位を持つ人々だけに委ねられているわけではないと述べました。また、イニシ

アティブが個人の健康と衛生について教育し、基本的な会計と簿記について訓練することで、起業家になる女性たちをどのように支援したかを語りました。これは、ミクロレベルでのグローバル化の事例になり得ると述べました。

基調演説

プリーティ・サラン

インド対外関係省（MEA）元事務次官（東地域）

こんにちは。このシンポジウムを企画してくださった、RISとJEFの方々に感謝申し上げます。

私が対外関係省の事務次官（東地域）としてインド太平洋地域を担当していた事実はさておき、我々の関係の政治的および戦略的側面に関して私がコメントすることは可能でしょう。しかしながら、ここには多くの専門家が参列しておられます。また、参加者の方々の経歴を読ませていただいたところ貿易専門家とエコノミストが多数おられることが分かりました。私は貿易専門家ともエコノミストとも名乗るつもりはありません。ですから、特にグローバルな合意形成の取り組みにおいて日を追うごとに摩擦が拡大している現在の状況を踏まえ、世界貿易体制の進化と多国間主義の役割をどのように考えるかについて、私自身の見解すなわちインドとしての見解を述べようと思います。

懸念や不確実性をもたらした一連の出来事のなかで直近の出来事と言えば、もちろんパプアニューギニアで最近開催されたAPECサミットでしょう。サミットに参加したアジア太平洋地域の首脳陣が、初めて共同声明の合意に至らず閉幕しました。貿易問題をめぐって米中間の深い溝が明らかになるさなかに起きた、APECの歴史上初めての出来事です。この2つの貿易大国間の貿易戦争についてはかなり前から報道されていますが、APECの出来事において興味深い点は、世界貿易機関（WTO）の改革問題についてのコンセンサス崩壊です。WTOはこれまで、多国間貿易交渉にとって最も堅固で活気のある成熟した機関でしたが、現在はいわば機能の急激な低下に直面しています。インドの専門的な外交官がWTOの有効性について実際に雄弁に語るとしたら、我々がウルグアイ・ラウンドやドーハ開発ラウンドに交渉・参加した時代からどれほど進歩したかを示すだけで事足りります。当時の我々は、インドやインドの代表団、または他の発展途上国が繰り返し懸命に得ようとしていた基本政策、または交渉において特別かつ個別の待遇を得ることができなかったのです。従って、WTOの失敗の多くは、①発展途上国のための特別かつ個別の利益に対する先進国側のコミットメントの未達、②ドーハ・ラウンドの交渉成立失敗、多国間貿易交渉の新分野の開放に起因する可能性があります。新分野は実際には貿易とはほとんど関係なくかけ離れたものでした。例えば、知的所有権の貿易関連の側面に関する協定（TRIPS）について言えば、①発展途上国が求めている柔軟性、②我々が求めている政策余地、③姉妹機関、すなわちTRIPS交渉についていえば世界の知的財産権機関について、発展途上国が戦い、開発課題をTRIPS関連の交渉に加えるよう求める必要がありました。我々も戦ったのです。

しかしながら、（自由貿易からの）離脱と、すでに捨て去られた保護貿易戦略への回帰という現象が現在起きています。しかもそれは、実際に政策余地を求めた発展途上国から起きているわけではないため、気掛かりなトレンドです。ユニラテラリズム（単独行動主義）や、少数に不当な優位性を与えたり、市場をゆがめたりする一方的な貿易協定は等しく非難されるべきです。特に発展途上国が全体として、貿易における統合を課題よりはむしろ機会として捉え始めた段階において、この動きは基本的に自由貿易の主張に逆らうものです。インドを含め、かつては経済発展水準が一致していない閉鎖経済のままであり続けた発展途上国にとって、大きな難題であることを繰り返し指摘したいと思います。

そんななか、貿易円滑化協定（TFA）の成功によって、各国がプロセスの簡素化に一層の努力をすれば、貿易の統合が促進できるという信念が確認されました。

TFAは、すでにリージョナリズム（地域主義）や二国間貿易協定が話題となっていた頃にWTOのプラットフォームに浮上しました。ところが、2つの経済大国（米中）間の意見の不一致が理由で幾度となく合意形成の取り組みが頓挫し、世界の景気回復に深刻なストレスをもたらしました。世界経済の成長エリアでは分散化が進んでいるという事実を認識できていないのです。今や実際に、大国・小国を含め多くの発展途上国が、GDP成長率や世界貿易の原動力となっています。

もう1つの気掛かりな動向は、大規模な連結プロジェクトやインフラプロジェクトの形で新規の援助計画を制度化することによって、比較的小規模な経済国の潜在成長力を活用する巧みな戦略です。これは、まさにその小規模経済国の潜在成長力に対して全く正反対の効果を及ぼしかねません。連結性強化や堅固なインフラに関する当初の確約によって、一部の国々に債務を被る危険が生じ、主権や21世紀の世界秩序への民主的な参加が損なわれることにもなります。21世紀は前世紀よりも柔軟な世界になると考えられているはずですが。

呼び方の好みはどうあれアジア太平洋またはインド太平洋の台頭は、今まさに現実であり、揺るぎないものとなっています。ところが、同地域にて利益の対立、時には対立を深める意図的な試みが生じており、それが慎重な国々を当惑させています。こうした背景を受け、インド太平洋地域の16カ国による東アジア地域包括的経済連携（RCEP）の協議が進められています。

RCEPのメンバーであるインドは、政治的および戦略的観点からインドのアクトイースト政策をさらに強化していくつもりです。また、インド太平洋地域のコンセプトを包括的かつ開放的でルールに基づく秩序として後押し、東・東南アジアとの関係の経済的支柱を強化していきます。そして、人と人とのつながりをさらに高レベルまで引き上げます。これは、最近シンガポールで開催されたRCEP サミットに出席した際に、我が国の首相が再確認し、繰り返し述べたことです。

さて、同様なことはWTOドーハ・ラウンド、RCEP 協議、インドが参加してきた他の貿易協定でも言えます。ラテンアメリカ地域の南米南部共同市場（MERCOSUR）、ASEAN 諸国の自由貿易協定（FTA）、またはインドが隣接していることが理由で関与している

南アジア自由貿易圏（SAFTA）、南アジア地域協力連合（SAARC）の枠組みもあります。SAFTA協議のメンバーが、SAFTAにてすでに実施していたコミットメントを果たすことを拒否しました。その際、グループ全体のなかで最大の国としてインドは、実際には後発開発途上国に対して一方的に譲歩しました。複数当事者または多国間の貿易協定に参加する場合に我々は、インドの交渉者、インドの専門家、インドのエコノミストとして、これまでよりも深い視点を持つ必要があります。世界貿易体制が関与している限り、我々の立場について、そしてその体制が我が国にとって適切に機能しているかどうかについて、必ず評価を実施するべきであり、場合によってはパフォーマンス監査も行います。

本シンポジウムの今後のセッションの討議を促すことを意図し、私の見解のいくつかをお伝えしたのはこうした背景からです。世界貿易においてインドは、常に恩恵を受け、優れた実績をあげてきたと自負しております。従って、等しく公平な責任分担のもとでルールに基づく多国間貿易体制を築くことは、必ずインドの利益となります。結局のところ、各国は貿易のために貿易するのではなく、発展するための手段の1つとして貿易を行うのです。よって貿易国は、市場へのアクセスを求めて交渉をしながら、比較優位について評価することが重要となります。従って、このような貿易協定で各国が享受する自然な比較優位をゆがめるような一方的な動きは、当然ながら懸念材料となります。もちろん、貿易交渉は複雑であり、貿易交渉者は自身の任務を果たしながら、慎重に扱うべきセクターに配慮しなければなりません。例えばインドでは、農業セクターや、最貧層のために仕事を創出する小規模事業セクターがこれに当たります。この分野は我が国にとって深刻な懸念材料です。ウルグアイ・ラウンドやドーハ・ラウンド全体を通して、また、東アジア地域包括的経済連携（RCEP）への参加や、その他の交渉においても懸念材料であり続けています。

国連貿易開発会議（UNCTAD）のインド代表者としてジュネーブに赴任した頃が思い出されます。発展途上国の代表者の間で繰り返しささやかれたのは補助金の話でした。やはり貿易をゆがめる補助金が存在しました。それは裕福な先進国によるもので、自国の農業従事者と自国の農業セクターに多額の補助金を出しながら、発展途上国には農業セクターを開放するようしつこく要求していたのです。当時の交渉者たちが、「インドやその他の発展途上国で貧しい農業従事者になるくらいなら、欧州で牛になった方がましだ」と繰り返し言っていたのを覚えています。これが、貿易のゆがみの本質です。交渉や農業や中小企業など非常に慎重に扱うべきセクターについて、現実的な立場を取るインド政府について言えば、我々がこうした重要な要素に気を配ることは大切だと思います。何故ならこれは、社会における最貧困層の生活の問題に直結しているからです。このような慎重に扱うべきセクターを政府が支援するべきである一方、あまりに依存させることは我々の利益にならないと私は考えます。よって、可能な範囲で支援するべきでしょう。再びジュネーブ時代の話ですが、無枠制度が撤廃された繊維協定ののちには、インドが繊維・アパレルセクター全体の完全なバリューチェーンを持つことになるため、おそらく最大の受益者になるであろうという予想と期待がありました。どうやらその見

込みはあまり正しくなかったようで、我々は競争力を保てませんでした。私は、近隣諸国のバングラデシュやスリランカ、カンボジア、ベトナムなどを含む他の国々が、いかに優れた功績をあげたかについて、多くのサクセスストーリーを知っています。そうしたストーリーからインドは学ぶことができます。

我々にとって関心のあるもう1つの分野は、特に対中国の貿易赤字拡大です。貿易赤字に関して専門家はどのように話すでしょう。輸出に関しては、必ずしも自国の輸出入のみに注目する必要はありません。時にはバリューチェーンの一翼を担うのも良いですし、競争を促し受け入れるのも良いことです。自国民が割安な商品を手に入れるようになり、また、バリューチェーンの一翼を担うこともできるため、輸入はそんなに悪いことではありません。私は、インドは貿易赤字額が600億ドルに達するまでに膨れ上がり、そして中国などの国から望ましい市場アクセスを得られていないという事実を心に留める必要があると思います。本シンポジウムにて特にインドのメンバーや専門家が、インドはどんな風に道を誤ったのか、そして、もっと良い結果を出すにはどうすればよかったのかについて、詳しく検証できることを期待します。例えばWTOの有効性、またはASEAN-インド自由貿易協定（FTA）を含む多国間貿易協定の有効性に関するパフォーマンス監査でしょうか？物品におけるASEAN・インド間のFTAの交渉時に期待していたため、それと比べてまださほど恩恵を受けていないというのが我々の感覚です。サービスと投資についても合意し、確約し、実施することを期待していましたが、それは実現していません。一方、東アジア地域包括的経済連携（RCEP）の交渉が開始されました。インドは、物品のセグメントを開放するよう再度圧力を受けますが、他の交渉国はおそらく、サービスや投資といった他のセグメントで我々に十分便宜を与えてくれないでしょう。ですから我々は考える必要があります。そして私は、本日お集りのすべての皆さんに考えていただきたいのです。多国間貿易協定なのか、WTOなのか、ASEAN・インド間のFTAなのか、それとも、それぞれ協議の段階にあるシンガポールや韓国、タイとインドが結ぶその他の協定なのかに関わらず、これらは本当に我々に役立っているのか、また、インドや他の参加国は軌道修正が求められるのか。もちろん、軌道修正は必ずしもすべての貿易相手国である必要はありません。貿易相手国や交渉相手国を単に非難するつもりではありません。我々も自分たちの能力を冷静に見つめる必要があると思います。失敗を恐れて過剰な保護に陥っていないか、適切な要素の保護を怠っていないか、また、何らかの失敗を犯していないか。我々がまだ、バリューチェーンの一翼を担っていない理由はどこにあるのでしょうか。インドは貿易交渉や世界貿易体制への参加とは別に、人口ボーナス期（就労人口の増加が経済成長を押し上げる）にあるという強みを持つという事実があります。自分たちを保護することによって、インドの人々がさまざまな物品にアクセスすることを実際に妨げていないのでしょうか。例えば、インド以外の中所得国に注目し、エネルギー需要量や栄養需要量を評価してください。我々は本当に、行き過ぎた保護主義者だったのでしょうか。これが理由なのか、それとも違うのでしょうか。これらが私の意見ですが、解決策を導くことを意図しているわけではありません。実際それは、この会場におられる専門家の方々の役目でしょう。このような非常に重要なイ

ベントを企画してくださったJEFとRISに深く感謝申し上げます。現代社会への転換と、21世紀の知識経済への飛躍を目指すインドにとって実りあるものになります。国内における我が国の基本的な転換への取り組みは、多国間主義に関するグローバルガバナンス体制の統合に貢献する、大規模な取り組みと合致しています。

セッション 1 貿易と新たな技術

アマル・シンハ

開発途上国リサーチ情報システムセンター（RIS）名誉フェロー

本セッションのモデレーター、アマル・シンハ大使によりますと、製造品はグローバル化や貿易自由化の波を大きく受けてきましたが、製造における多くの要素は依然として保護主義の傾向にあります。

同氏は、多国間主義は包括的で参加型であり、あらゆる者に意見する機会と立場を平等に与え、合意形成のシステムに基づいていると述べました。また、多国間機関は「誰も置き去りにしない」という持続可能な開発目標（SDGs）のモットーを考慮する必要があると主張しました。

技術に関しては、雇用創出ニーズとの均衡を保ちつつ、技術を提供し、技術的発明・革新を保護する政府の役割を強調しました。また、①輸出主導型成長、②貿易における高度技術製品の貢献、③グローバル・バリュー・チェーン（GVC）参加のレベル、④国内の能力開発を可能にするグローバルな視点と地域の視点による貿易体制、これらに関しての各国の経験について質問を投げかけることによって討議を進めました。

マン・ジュン・ミニョンヌ・チャン

アウト・オブ・ザ・ボックス・コンサルタンシー 取締役

マン・ジュン・ミニョンヌ・チャン博士によりますと、東アジアの製造セクターにおける輸出主導型成長の成功は、生産手法、スキル要件、生産機能の性質および外部環境によって左右されます。同氏は、数カ国のハイテク製品の貿易実績を提示しました。第4次産業革命がもたらす課題に向けて準備することに加えて、補助金の削減や海外直接投資（FDI）の促進によって国内の能力開発を進めることを強調して講演を締めくくりました。また、各国は、知的財産権（IPR）侵害問題に直面することが避けられないため、IPRに関する規則は、国内の能力を反映した、その国に適合するものにするべきであると、改めて主張しました。

ダトウ・セリ・ジャヤシリ・ジャヤセナ

マレーシア通商産業省（MITI）元事務次官

ジャヤシリ氏は、サービスセクターの技術に注目しつつも、通信と連結性に関する技術的進歩への関心が不足していたことが、地域内にて先進国と発展途上国間の格差拡大につながっ

たと指摘しました。さらに、適切な知的財産権（IPR）の保護とスキルの供給ができるような環境を整備することが不可欠であり、そのため、各国は技術移転について互いに協力するべきであるとの見解を示しました。また、第4次産業革命に適合する総合的なサプライチェーンの重要性を示唆しました。サプライチェーンに携わる企業の大半が中小企業（SME）であるため、政府は助力者または仲介役の役割を果たし、法的枠組みやインフラ、人材開発を通して、SMEがコンプライアンスを順守できるよう支援する必要があります。

同氏は、関税の自由化、非関税、投資やサービスに注目する代わりに、技術開発を優先すべきだという考えを述べました。また、アジア太平洋地域は協力し合って、ASEANを世界の生産とサービスの拠点にしていく必要があるという見解を示しました。

二国間協定の例を示して最近の自由貿易協定（FTA）が技術開発に関する協力の道を拓いたことを指摘し、FTAが貿易自由化のためだけの手段だという考えを否定しました。

マレー・マクレーン AO

ダンモア・マクレーン社 会長

マレー・マクレーン大使は、第4次産業革命の到来を指摘し、世界は根本的に変化し、世界、地域および地方のあらゆる経済が影響を受けていると述べました。新たな戦略を策定する必要性を強調したうえで、国際主義と呼ばれる開放的なアプローチによってのみ、世界や地域、国の利益がもたらされることを指摘しました。

知的財産（IP）の保護、人材開発、ITCの低コストでの無制限の利用と共に、貿易慣行の自由化と円滑化を進めることの必要性を指摘しました。

戦略としての多国間主義と国際主義は、短期的な痛みを伴いますが長期的には利益をもたらすとししました。ナショナリズムと保護主義は内向き志向でグローバルな観点からはマイナスであり、よって、短期的に利益をもたらしても、ほぼ確実に長期的な痛みを生むに違いないと述べました。

サイモン・テイ

シンガポール国際問題研究所（SIIA）所長

サイモン・テイ教授によりますと、米中の貿易問題はより広範にわたり深まっており長引く可能性があるため、世界は、地政学的かつ地域的統合について変化の節目を迎えています。これは、すべての者にとってのマイナス・サム・ゲームであり、グローバル・バリュー・チェーンの混乱と変化をもたらす可能性があります。しかし、ASEANおよび南アジアは、相対的にはこうしたマイナスの状況から利益を得るかもしれないと同氏は予想します。

ASEAN諸国は、世界水準を超える成長を遂げ、また統合が進んでいます。この地域に生産拠点を求める者の多くは、中国に加えてASEAN諸国に目を向けるでしょう。インドによるアクトイースト政策を受けて、インドはもう1つの可能性となります。インドは一国の勢力として浮上しましたが、地域の他の国々とまだ十分に関わり合っていません。インドは選挙が終われば、アジアの他の諸国との交流は加速するでしょう。東アジア地域包括的経済連携（RCEP）の取り組みを継続させなければなりません。

ASEANについては、中所得国の罠に陥らないよう新技術を導入する必要があると同氏は指摘しました。また、貿易ルールに基づくアプローチから統合拡大に焦点を置くアプローチへと貿易協定を見直し、技術や新しい考え方、政策を幅広く適用して、インフラとスマートシティの構築を進めるべきであることを強調しました。業務委託と人々の移動を可能にし、規制の改善に向けて地域的アプローチを進める必要もあります。こうしてアジアおよびASEANは、貿易量を増加させるだけでなく、経済統合を進展させることができます。

ナッタワット・ラクサナパンヤクル

タイ開発研究所（TDRI）コンサルタント

ナッタワット・ラクサナパンヤクル氏は、研究開発費がGDPのわずか0.3%というタイの低レベルの技術開発についてコメントしたうえで、新しい開発モデルを導入しない限り、タイは中所得国の罠に陥る可能性があるとの懸念を示しました。新しい開発モデルでは、技術の遅れの挽回、連結性の有効活用、労働生産性の強化、環境保護といった課題に取り組むべきであると提案しました。同氏によりますと、タイ政府は、環境の変化に適合した貿易政策および産業政策を策定するために最善を尽くしてきました。具体的には、貿易相手国との地域貿易協定の実施、FTA税率の引き下げ、主な幼稚産業（例えば、自動車産業）の保護、関税率の引き下げなどです。また、開発における4つの時代について述べました。まず、輸入代替の時代から輸出促進の時代へと進化しました。そのあと自由化の時代が続き、最後は混乱の時代です。保護主義の台頭と技術の変化に伴う混乱の時代が到来するなか、同氏は、製品の輸出が困難になると予想しています。

セッション 2

地域統合に向けての必要要件：サービスセクターの増大する役割

原岡 直幸

国際経済交流財団（JEF）専務理事

本セッションのモデレーター、原岡 直幸氏は、サービスセクターが製造セクターの競争力を強化する主要セクターであるとし、貿易の自由化は、製造セクターよりもサービスセクターに大きな影響を及ぼすであろうと述べました。

同氏は、サービス貿易の拡大に関して、先進技術（モバイル技術、AI、3Dプリンターなど）を活用する必要性、新たな規制ファイアウォールの要件、国内の消費者保護の準備などの課題を提示することによって、本セッションで期待される主な論点を説明しました。さらには、不必要な規制負担を避けるための規制改革を促進する必要性も説明しました。ネガティブリスト・アプローチ、相互承認、データの機密性、国有企業、国内規制といったサービス貿易の新たな領域に対処する方法について明かし、解決策を求めました。

チュンヨン・アン

韓国中央大学校（CAU）名誉教授

チュンヨン・アン教授によりますと、アジア太平洋地域のサービス貿易を促進することにより、成長を阻害する保護主義に対抗するデジタルの展開と雇用創出に新たな進展がもたらされる可能性があります。サービスセクターの自由化により、市場主導型のクロスボーダー・サプライチェーンと物品・サービスの貿易が強化され、さらには製造業と経済全体の効率が向上すると繰り返し述べました。また、11カ国による環太平洋経済連携協定（TPP11）（2018年12月30日発効）でのサービス貿易のための貿易自由化対策は、東アジア地域包括的経済連携（RCEP）で協議された対策よりもかなり高度で進歩していると考えられるため、RCEP交渉でのサービス自由化条項を改訂するべきであると指摘しました。

サービス貿易の自由化における第4次産業革命に関しては、デジタル先進国とデジタル後進国の間には大きな技術格差が存在すると述べました。十分に調整の取れた優れたサービス貿易政策が特に中小企業のために情報やスキル、技術へのアクセスを促進することによって、包括的な成長を促すことが可能になります。

アジア太平洋地域諸国間の深刻なデジタル格差に関しては、デジタル後進国のデジタル能力開発のために国際的な協力メカニズムを構築し、サービスセクターの自由化を推し進める必要があると指摘しました。

アン教授によりますと、海外直接投資に関する規則を各国間で調和のとれた形にし、地域のバリューチェーンを十分に活用する必要があります。しかしながら、後進国にとって、間接投資の誘致にネガティブリスト方式の導入を受け入れるのは困難かもしれないとの懸念を示しました。特に、短期的な利益を追及する敵対的M&Aによる海外ヘッジファンドの動きを、注意深く監視するべきだと指摘しました。

同氏は、地域内のクロスボーダーEコマース取引の促進についてASEAN諸国が合意したこと喜びを表明しました。また、ASEANの結束は、サービス自由化のウインウインの枠組みにおいて、既存のASEANに加えてさらに数件の自由貿易協定（FTA）の実現へと拡大が可能だと提言しました。さらには、観光・Eコマースセクターを重視し、格安航空会社がアジア太平洋地域をもっと自由に就航するために地域内のオープンスカイ協定を拡大すれば、地域の観光産業の発展に新たな勢いがつくはずだと述べました。

物品・サービス貿易におけるデジタル変革を最大限に活用するには、より総体的な開放を実現すること、また、完全なバリューチェーンへの対策と連動させて、物品とサービス、デジタル接続への対策を考えることが必要であると結論付けました。

プラビール・デ

開発途上国研究情報システムセンター（RIS）ASEANインドセンター

教授・コーディネーター

プラビール・デ博士は、インドのサービス貿易が2010年の300億米ドルから2016年には450億米ドルへと増加したことについて説明しました。インドは、物品ではASEANに対して貿易赤字となっていますが、サービスではASEANに対して貿易黒字を計上しています。ASEAN

においてインドのサービス貿易の主要相手国はシンガポール、マレーシア、タイ、インドネシアであり、インドのASEANへのサービスの輸出は、主に第1モード、第3モードおよび第4モードにて取引されています。それでもなお、インドとASEANの間には、伝統的サービスと新興サービスの両方で、まだ実現されていない大きな可能性が存在します。インドは、ASEAN諸国全体とインドとの初めてのこの種の協定であるASEAN・インドサービス貿易投資協定（AISTIA）を締結しています。2004年に調印しましたが、まだ実施には至っていません。プラビール・デ博士は、ASEANとインドのサービス貿易が拡大することで、地域の多国間貿易の関係が強化されると主張しました。サービスの統合は、各国の市場へのアクセス向上だけでなく、世界の市場への総体的なアクセス向上をもたらします。但し我々は、ASEAN経済共同体（AEC）ブループリント2025の目標と、サービスに対するインドの取り組みや利益の間に関連が存在する分野に焦点を当てる必要があります。同時に、AECやRCEPなど地域の他の取り組みとの調整について措置を講じる必要があります。能力と利益において明確な補完性が双方に存在するサービスへの二者間投資を促進することにより、サービスのバリューチェーン強化への道が開かれます。よって、インドとASEAN諸国は、製造とサービス貿易（ビジネス支援、IT、輸送）の間の相乗効果、および地域のバリューチェーンにおけるサービスの役割を探っていきます。サービス貿易の拡大には、地域全体の輸送と通信接続の強化が不可欠となります。

アジア太平洋地域の国々は、ICT、エネルギー、研究開発、健康、Eコマースなど、セクター別、および課題ベースでの協力に取り組むことが可能です。アジア太平洋地域の国々は、オンラインまたはオフサイトのサービスを提供するために、専門家やビジネス訪問者、企業内転勤者などの移動を容易にする必要があります。各国間の規制上の協力、ベストプラクティスについての情報交換も同様に重要です。次のステップは、専門機関間の調整強化と、資格についての相互承認の強化でしょう。おそらく、アジア太平洋地域の国々は、規則と規制基準の総合的開発、知識や経験、能力開発の共有について検討できるはずです。

ゲイリー・ホーク

ヴィクトリア大学ウェリントン校（VUW）名誉教授

ゲイリー・ホーク教授は経済統合におけるサービスの役割について触れ、異なるアプローチにより、サービスを単に貿易の個別の要素として見すべきではないと主張しました。サービスは、輸出入品との組み合わせに限定して取引されることも多いため、経済統合にとってはサービスセクター全体の効率性が重要になります。

同氏は、貿易当局間の交渉に依存するよりむしろ、各国の規制当局間で直接やり取りすることの必要性を強調しました。定められた目的を満たし、かつ国内の物品製造と海外の物品製造の間に全く差別のない、効果的な政策を立案することに焦点を置くべきだと述べました。

アニータ・プラカシュ

東アジア・アセアン経済研究センター（ERIA）政策関係局長

アニータ・プラカシュは、サービス貿易に関する東アジアの視点に注目し、東アジア地域が

サービス貿易にどのように対応しているかについて話しました。同氏は、サービス貿易特有の弾力性について理解する必要があると指摘しました。アジア太平洋地域は世界の工場と呼ばれているにもかかわらず、ASEANプラス6カ国とインドのサービスセクターの実績はそれほど悪くないと同氏は語ります。ASEAN 10カ国のサービスセクターは物品貿易の4分の1相当であり、中国は約10分の1、インドとニュージーランドは約半分、韓国は5分の1であることを示して、その指摘を裏付けました。ほとんどの国々では経済活動の約50%をサービス業が占めており、アジア太平洋地域は他の国々と比較した場合に、EU28カ国や米国、そしてロシアにさえ若干後れを取っています。従って同氏は、貿易全体においてサービス業の寄与度を上げる大きな改善の余地が存在すると考えています。

サービス貿易を比較の視点で示す一方で、すべての指標の伸びが低下する傾向にある場合、アジア太平洋地域の新興国の成長には消費が非常に重要な原動力になると述べました。よって、輸出入はとても重要です。また、消費に加えて、政治指導と政策（インフレ、社会保障および資源配分）が、新興国にとってこの先数年間極めて重要になると述べました。

米国やドイツ、英国といった国々は、ASEAN諸国に比べてサービス貿易の多様化がかなり進んでいることを指摘しました。インドなどアジア太平洋地域の国々の一部は、多様化に関してかなり好調な実績を示しています。但し、ASEAN諸国は、旅行や観光などのセクターに頼っている現状から脱却し、サービス輸出の多様化をさらに進める必要があると述べました。

同氏の考えでは、サービスセクターの視点による地域・世界経済の今後のあり方は技能ベースであるべきであり、人材への投資が非常に重要になります。従って、技能や研修、研究開発への投資は、アジア太平洋地域にとって非常に重要な課題だと同氏は言います。また、高度な技能を有する人材や研究開発はポスト製造業経済において不可欠であり、これらの分野への投資に大きな注意を向ける必要があると述べました。

サービス貿易を促進する重要な分野に政策の焦点を当てることを強調すると共に、アジア太平洋地域は、課税、企業の報告、財源の配分に関する重要な政策について、独自の見解を持つ必要があることを指摘して講演を終えました。

浦田 秀次郎

早稲田大学大学院アジア太平洋研究科（GSAPS）教授

浦田 秀次郎教授によりますと、経済活動のデジタル化は多くの利益といくつかの課題をもたらします。医療と教育の分野を例にあげ、デジタル化が既存の物品とサービスの貿易に取って代わり、また、人々の実際の移動に取って代わる可能性があると主張しました。具体的には、3D プリンティングが物品の貿易に置き換えられる例を示しました。

貿易政策の自由化によって競争が激化し、その結果、競争力のない企業は業界から退散を余儀なくされる可能性がある、と、同氏は述べました。従って各国経済は、競争の激化によって生じる課題に直面することになります。

海外での競争激化がもたらす課題に対処するためには、技術支援や教育、再訓練、一時的保護といった形で貿易調整援助プログラムを提供するうえで、政府の役割が大切であると指摘しました。

データ化に焦点を当て、すべての企業や人々はビッグデータを通して、多くの機関が収集したデータを使用可能であり、また、目標を最大限に生かすうえで役立てることが可能だと同氏は述べました。政府によって公平な競争環境が与えられれば、中小企業はこうしたビッグデータの利用による恩恵を実際に受けられると指摘しています。また、データ化のマイナス面に注目し、規模による経済と多角化による経済の問題点を指摘しました。データ化の影響として、適切な競争政策が適用されない場合は超巨大企業が出現する可能性があります。データ化が、企業間で、さらには各国間でデジタル戦争を引き起こすかもしれません。もう1つの課題はプライバシー保護だと同氏は指摘します。これらすべての課題に対処するために、デジタル経済に関する明確な規則を整えることが重要だと提言しました。

ジャン・ジェンピン

中国商務部（MOFCOM）国際貿易経済合作研究院（CAITEC）

地域経済研究センター 所長

デジタル経済に関する討議に加えて、ジャン・ジェンピン博士はEコマースの重要性を指摘しました。Eビジネスの消費量が毎年30-50%という伸び率で急増している中国では、Eビジネスの新しいビジネスモデルが活況であることを明らかにしました。また、この新しい分野が直面している課題にも触れ、プライバシーの問題と輸入品の税金に関する懸念を表明しました。WTOは、この種の新しいビジネスモデルを規制する方法について検討する必要があるのと見解を示しました。

フィンテックへと話題を進め、中国の「支付宝（アリペイ）」と「微信支付（ウィーチャットペイ）」が、タクシーの手配、ウェブ上や小規模店舗での決済など、さまざまな場面で高い人気を得ていることを伝えました。フィンテックは経済における新たなトレンドになり得るとの考えを示し、国内外にて規則や規制の批准を得ることが必要になると述べました。従って、人材開発に向けて研修コースや教育を強化する必要性を強調しました。最後に、インドと中国の経済関係についてコメントしました。インドはサービスセクターに強みがあり、中国は製造セクターに強みがあるため、結果として補完的な関係になると述べました。この件に関して同氏は、中国とインドの地域的経済協力と地域的経済統合によって、より包括的な経済関係を促進できるとの楽観的な考えを示しました。

セッション3

インド太平洋地域におけるSDGsの重要性と役割：SDGs達成のための戦略

サチン・チャトゥルヴェディ

開発途上国リサーチ情報システムセンター（RIS）所長

本セッションのモデレーター、サチン・チャトゥルヴェディ教授は、持続可能な開発目標（SDGs）と連動した国の開発戦略について記した論文で使用される、新しい用語の数々を説明することでセッションを開始しました。SDGsの現地化、SDGsとの整合、SDGsの土着化、

SDGsとの統合、SDGsの主流化、SDGsの適合、SDGsの国営化などです。

SDGsの指標には3つの階層があると同氏は指摘します。同氏によりますと、第一の階層は、すべての国連加盟国が合意できる目標、第二の階層は、合意されているが指標が特定されていない目標、第三の階層は、指標がないまたは合意されていない目標です。目標16や目標17などの極めて重要な目標は、単純なものではないことも加えて述べました。

同氏は、SDGsがどのように領域間で関連付けられるかについて説明しました。例えば、ある者が農業について話す場合に、ある者は水の集約度を認識しなければなりません。「ASEANビジョン2025」は「ビジョン2030」と同調しており、SDGsの主要要素を反映しているため、ASEANから教訓を得ることも可能だと述べました。最後に、すべてのスピーカーに対して次の4つの問題を提起しました。①地域のためにSDGsを検討するにあたり、パネルの皆はどのような厳しい課題に向き合っているのか。②多次元的な貧困に対処するために求められる総合的なアプローチをどのように定義するのか。③貧困層の人々の生活とスキルの問題と地域公共財に取り組むメカニズムにどのように対処するのか。④不平等にどのように対処するのかです。

ヨセ・リザル・ダムリ

インドネシア 戦略国際問題研究所（CSIS）経済部長

ヨセ・リザル・ダムリ博士は、アジア太平洋地域における持続可能な開発とそれに関連する課題の重要性について説明しました。インドを含む東アジアおよび太平洋地域は、急成長を遂げている地域として台頭しており、同地域の国々の間では結束が高まっていることを指摘しました。

同氏は、貧困線以下の生活をしている人々が数の上、および割合では大幅に減少しているものの、特に脆弱な状況で生活する貧困層の数が依然として多いことを図表を用いて示しました。よって、同氏の説明によれば、不平等は拡大しており、それが経済成長に悪影響を及ぼす可能性があります。国連アジア太平洋経済社会委員会（UNESCAP）のデータに基づき、低所得の家庭の子供は学校を途中退学する傾向が強く、比較的高所得の家庭の子供は中等教育やさらには高等教育に進む傾向が強いことを指摘しました。さらに、多くの国々では、公衆衛生や清潔な水への十分なアクセスがいまだに整っていないのが現状であると述べました。また、経済の進展・発展による環境への影響についてさらに配慮することの重要性を強調しました。森林伐採率が高い状況が続き、1973年から2013年の30年間に森林のおよそ半分が経済活動のために失われたインドネシアのボルネオ島の例を報告しました。環境への影響を軽視すれば、経済活動から得る利益を上回るコストを社会が必ず被ることになるのです。

持続可能な開発目標（SDGs）を解決策の一部とする考えを示し、UNESCAP 2017年報告書によると、アジアは多くの目標についてまだ後れを取っていると述べました。同地域で進む高齢化人口の増加によって、持続可能な開発の問題解決がより困難になることを踏まえ、高齢化社会など、厳しい将来の課題についても指摘しました。課題解決のためにすべてのステークホルダーが協力することを同氏は提案しました。ビジネスセクターはSDGsにおいて極めて重要な役割を果たしてきましたが、同セクターのSDGsへの意識は限られたものに過ぎず、

多くの目標は関心さえないことを指摘しました。同様にして、コミュニティが持つ関心も、民間セクターや政府とは異なります。

技術の進歩によって人々への連結性が高まることを踏まえ、技術は、低所得の家庭や低所得の人々への機会を促進する触媒の役割を果たす可能性があることも強調しました。また、新しい技術は、過去に比べて必要とされるスキルが少なく、経済目的での利用がますます容易になっているため、低スキルの労働力が技術の進歩を活用できるようになるとの考えを示しました。

チ・タン・ヴォ

中央経済管理研究所（CIEM）エコノミスト

チ・タン・ヴォ博士は講演を開始するにあたり、30年前には貧困線以下の人口が70%を占めていたのに、現在は貧困線以下の人口がわずか3-4%となったベトナムを例にあげました。ベトナムは、30年前には最も閉鎖的な経済国でしたが、現在は貿易と海外直接投資（FDI）に関して最も開放性の高い国の1つとなっています。

同氏は、貿易の自由化と統合が持続可能な開発目標（SDGs）に及ぼす影響と、SDGsの実現するために統合と自由化がいかに有効であるかについて焦点を当てました。

3つの重要なC、すなわちコミュニティ（Community）、連結性（Connectivity）、協力（Cooperation）に基づくASEANの統合から学ぶ必要性を強調しました。また、SDGs達成に向けての高度な地域統合のパラダイムを掲げ、4つの主な側面を指摘しました。①国境をまたぐ、または国境の内側（国内）における貿易投資の自由化、②新しい貿易問題、③労働環境基準、④Eコマースです。Eコマースについては、例えば「環太平洋パートナーシップに関する包括的及び先進的な協定（CPTPP）」や関連するデータ移行、連結性、協力が関連します。新しい機会を探るにあたり、制度上の能力、ビジネスや人材の能力の必要性を強調しました。

ジョセフ・ヤップ

フィリピン大学経済学部（UPSE）教授級講師

ジョセフ・ヤップ博士は、世界の脆弱性の源となる要因をあげました。その要因には、米国とEUにおける金融政策の正常化、貿易摩擦の拡大、地政学的緊張（例えば、朝鮮半島や中東）などがあります。中国国有企業が多額の負債など悪影響または波及効果をもたらす局所的な問題もあります。このような脆弱性は、主に変動の激しい資本の流れが原因で弱点に変わることがあります。

同氏は、国際通貨基金（IMF）が主導する国際金融セーフティ・ネット（GFSN）が存在し、国、地域、世界の構成要素を備えていることを強調しました。GFSNの役割は、危機回避および危機管理にも及びます。

GFSNには多くの弱点があります。IMFの財源不足、特に1997年アジア金融危機後のIMFの評判や信用の問題、チェンマイ・イニシアティブ多国間協定（CMIM）の不十分な財源などです。

これらの弱点が原因で各国は自己保険に依存してきた、と同氏は主張します。各国が外貨準備高を積み上げたため、1997年アジア金融危機の頃以降、外貨準備高は急増しました。こうした外貨準備高の積み上げの代償として、投資が減少し、持続可能な開発目標（SDGs）の促進に割り当てられる財源が減少したのです。従って、地域協力の改善が重要な解決策となります。CMIMの構造を見直し、IMFの信頼性を強化することが重要です。

サイカット・シンハ・ロイ

ジャダプール大学教授

サイカット・シンハ・ロイ教授は、世界的には不平等の絶対的レベルが低下したかもしれませんが、個別の地域を見ると特にアジア太平洋地域では、1990年代から2000年代にかけて不平等が大幅に拡大したと主張しました。

同氏は、1990年代から2000年代にかけて、インドやインドネシア、ベトナムなどの諸国では不平等が僅かに緩和された一方、大半のアジア諸国では大幅に拡大したことを図表を用いて示しました。

この問題を分析したところ、これらの国々は皆、サービス業の拡大へと大きく飛躍してきたことが分かりました。製造業の比率の変化についての構造的変化を測定すると、低所得国と下位中所得国のみにあって、製造業の比率上昇が実際に不平等の拡大をもたらしていることが分かりました。

国内総生産（GDP）におけるサービス業の比率の構造的変化に関して言うと、大半のアジア諸国が該当する低所得国、下位中所得国および上位中所得国では、GDPにおけるサービス業の比率の1%増加につき8.53%の不平等の拡大が見られると指摘しました。従って、サービスセクターへの飛躍は実際には、太平洋地域を含むアジア諸国の不平等を増幅させたと結論づけました。

同氏は、不平等を緩和するための手段として、貿易、海外直接投資（FDI）、インフラおよび連結性を含むマクロ経済政策と、その国特有の介入を提案しました。さらには、現金給付や補助金といった形態での財政政策、最低賃金の保護、社会的保護政策、さらにはSDGsの目標10にて示されるような社会から取り残された人々のエンパワーメントが、不平等の緩和に効果的だと述べました。

そうした政策は、零細企業セクターと、教育による能力開発に特に焦点を置き、中小零細企業（MSME）に向けて策定されるべきであるとの意見を述べました。また、貿易、海外直接投資（FDI）、インフラおよび連結性への支援を強化する政策を提案しました。さらには、金融包摂、制度上の能力に欠ける脆弱な国々での制度上の能力の開発が、所得の不平等を緩和させる可能性があるとの指摘しました。

（終）

(英語)

English Summary drafted by RIS.

Asia-Pacific Forum 2018

Protecting the Global Trading System and the Role for Multilateralism

INTRODUCTION

The Research and Information System for Developing Countries (RIS), New Delhi in partnership with the Japan Economic Foundation (JEF), co-hosted the Asia Pacific Forum (APF) in Delhi on 22-23 November 2018 at the India Habitat Centre. The main event of the APF 2018 was its Public Symposium under the theme 'Protecting the Global Trading System and the Role for Multilateralism' on 22 November 2018 consisting of three Panel Sessions focusing on 'Trade & New Technology'; 'Imperatives for Regional Integration: Growing Role of Service Sector'; and 'Importance and Role of SDGs in the Indo-Pacific Region: Strategies for Attainment of SDGs'. The Forum was attended by 20 senior and eminent economists, experts and policymakers from the Asia Pacific region. In addition, more than 110 other participants representing eminent scholars, serving and retired diplomats, policy makers and shapers, subject experts, industry leaders and media persons as well as 29 high ranking officials and others from 21 ITEC partner countries, who were attending a 2-week long study programme on 'Learning South-South Cooperation' took part in the event. The keynote address at the public symposium was delivered by distinguished career diplomat Amb. Preeti Saran, former Secretary (East), Ministry of External Affairs, Government of India.

The meeting was organized in the backdrop of unprecedented rise in protectionism and threats to existence of rule based multilateral global system. It is likely to have extremely serious repercussions for the global economies causing sharp decline in international trade flows and widespread unemployment, particularly in the developing countries. It is, therefore, imperative that multilateralism and globalization need to be defended and promoted by the international community for the promotion of peace and prosperity in the Asia-Pacific region. In addition, the emergence of new technologies on the global scene is creating new opportunities and challenges which have to be effectively dealt with in the regional context. The global importance being accorded to the Sustainable Development Goals (SDGs) and its linkages with various sectors of the national, regional and global economy, including in the Asia-Pacific Region, were deliberated upon. In addition, the spotlight also

turned to the service sector which would contribute more than 70 per cent of the GDP in the ASEAN region. The role and importance of Global Value Chains offering scope of specialization and fragmentation of services particularly in logistics, transport, finance, communication and other sectors feeding trade in goods also prominently figured during the deliberations apart from the wave of services orientation demands with respect to trade and investment in the Asia-Pacific region.

The Asia Pacific Forum 2018 provided an excellent opportunity to deliberate on the existing and emerging challenges in the region and came up with a wide range of options for the way forward. In this Report the key observations made by the eminent speakers and panelists in the Public Symposium at the APF 2018 have been highlighted for the benefit of the stakeholder community in the Asia-Pacific.

Welcome Remarks

SACHIN CHATURVEDI

Director General, RIS

A very warm welcome to all of you to Asia Pacific Forum, 2018. It is one of the extremely important initiatives and I am sure that CEO, JEF Mr. Kazumasa Kusaka San, would share with you his thoughts on its role and importance.

RIS, as you might be aware, has carried out considerable work on various facets of the evolving Indo-Pacific Initiatives. As a part of its focus on such critical issues, the ASEAN India Centre is housed in RIS. Our partnership with ASEAN goes back to 1992, when India initiated its sectoral dialogue partnership with them. Since then, several studies and projects have been undertaken by RIS for consolidating our collective understanding on the vital issues involved. Our work on exploring the nuances of India's engagement with the region and with its Look East Policy continued unabated. Upon its arrival, the current government announced India's Act East Policy. It was almost around this time in 2013 that RIS established the India-ASEAN to bring in the heft that is required in terms of empirical-based analysis of India's trade, investment and technology cooperation with ASEAN Member States.

Friends, as you would agree, this is the time, as we are all readying ourselves for entering into the Asian century, which will constitute an important part in history of time where we would be bringing in almost all the countries together as part of our collective commitment to SDGs under which no one is to be left behind. Fortunately or unfortunately, the geo-politics is also emerging in a manner where ASEAN countries would be playing an extremely important role to make this planet more inclusive by adding Asian ethos, values and new

approaches together and that, I consider, would provide the right traction that APF tries to bring to the table.

I am glad that we have been joined here by representatives of several countries. It is also the time when RIS is hosting an ITEC Programme, which is the flagship capacity programme of the Ministry of External Affairs, for capacity building among the developing countries. Under this Programme, diplomats, academics, officials and others from different parts of the world come to RIS to take part in a 2-week course on 'Learning South-South Cooperation'. There could not have been a better occasion than this to bring in 32 participants from 22 countries to this event. They are from Latin America, Africa and Asia.

RIS has been a founder member of this Forum and has participated in its last three successive events. I am confident that this important initiative would enable us to develop a better understanding of the issues involved which is absolutely essential for coherent policy shaping.

KAZUMASA KUSAKA

Chairman and CEO, JEF

Thank you very much for the introduction, this is Kazumasa Kusaka of the Japan Economic Foundation.

Her Excellency Preeti Saran, Dr. Satin Chaturvedi, Director General of the Research and Information System for Developing Countries, which is our co-host, to all of the experts from the Asia-Pacific region who have gathered here today, and to distinguished guests, and ladies and gentlemen, I am truly honored to be here today and to have this opportunity to greet you.

We at the Japan Economic Foundation have been hosting dialogues with Asia, the U.S, and Europe in order to achieve sustainable growth in the regions. And in recent years, we have been taking up constraining factors to such growth, and have sought its solutions and learned from each other on the policy successes and failures.

We began our first Asia-Pacific Forum in 2003 in Singapore to promote FTAs in this region. This year marks the seventeenth annual Forum.

The venue for this year's Forum, India, has promoted not only the software industry but also IT, robotics, and make-in-India, and under the initiative of Prime Minister Modi, its ranking in "Ease of Doing Business" greatly improved. India is the most fitting location to talk about free trade and investment, and Industry 4.0. I would like to express my gratitude to RIS for agreeing to co-host this year's Symposium.

Since our first symposium in 2003, discussions have kept pace with the progress of economic integration within ASEAN, who holds a central role in the integration process of this region, and it has expanded from border measures, such as custom duties, to domestic systems and its practice, which are called behind the border measures. These deep liberalization has an element of affecting our daily life, society and industries. We have learnt from members on how each of their nations and regions addressing these issues.

In this region, TPP from which the US has decided to withdraw will become effective as TPP11 on December 30. Negotiations for agreement on RCEP is also at a period where it requires the most critical political leadership, just like one step away from the peak of Mount Everest, but most dangerous moment when climbing up the very challenging Mountain.

On the other hand, in Western nations, as the expression, “everything is globalized except our consent,” accurately represents, globalization is causing a mutiny in the form of refusal to “consent” from its constituents, leading to a phenomena where political leadership of democratic nations is swayed by these huge movements. This can be seen with the UK withdrawing from the EU which was thought to be the model of regional economic integration. The US has also fallen into protectionism as represented by the “America First Policy”.

Increasingly, globalization is considered to be the root cause of the growing income and asset disparities, or undesired movement of people. But is globalization to blame for the decreasing number of working staff? Indeed, parts and components come from all over the world as part of the global supply chain and value chain, brought on by free trade and investment through FTA, which is an institutional aspect of globalization. Or, is technological innovation such as AI and robotics causing a major social transformation?

The first Industrial Revolution faced conservative reaction from the Luddite Movement. Yet we also know that historically technology has created more jobs through economic growth. Is Industry 4.0 different from the past revolutions, with its speed and magnitude?

For economic growth to absorb shadow of globalization and Industry 4.0, there is a need for institutions, namely Breton Woods System and other international public goods to evolve. We need to restore trust and confidence in these institutions.

Whether one likes or not, globalization will continue to progress, and with Industry 4.0, each country is required to face the problems of disparities and poverty. Inclusive growth will be a major challenge in pursuing regional integration. The process to cope with this challenge is something similar to

creating a new domestic social contract. In other words, each country is required to create a “better globalization”.

For the growth strategy for this region to succeed, I think it is essential that we cooperate with each other and promote mega FTAs. Since the US leadership is now “hospitalized” for a while, I think it is our region that must take on the role of the promoter of free trade, and take action for economic integration.

I end my remarks by hoping that today’s Forum will further strengthen our bond in this region, promote economic integration, and contribute to the sustainable development of our economies. Thank you very much for your attention.

AMAR SINHA

Distinguished Fellow, RIS

Ambassador Amar Sinha shared his experience of a Barefoot College in Rajasthan, India, which he regarded as the major social entrepreneurial endeavour, and said that monopoly of technology or technical knowledge does not rest with the people with technical degree only. He narrated how an initiative has helped women to become small entrepreneurs, in providing education on personal health and hygiene and also training in basic accountancy and book- keeping. He called this can be an example of globalisation at the micro- level.

Keynote Address

PREETI SARAN

Formerly Secretary (East), Ministry of External Affairs (MEA), India

Good afternoon.

Thank you RIS and JEF for organising this symposium.

Quite apart from the fact that as Secretary (East) in the Ministry of External Affairs, I looked after the Indo-Pacific region, and I can comment on in terms of political, strategic aspects of the relationship, but I can see many experts sitting here and what I have read about the participants, makes very clear that I am amidst trade experts and economists. Since I neither claim to be either a trade expert or an Economist, I would try to give my own perspective, an Indian perspective on how we see evolution of the global trading system and the role for multilateralism, especially in the current context, where frictions are in global consensus building efforts are multiplying with each passing day.

Of course, the latest in the series of the events that have led to apprehensions and uncertainty comes from the recently concluded APEC Summit held in Papua New Guinea. The Asia Pacific leaders who participated in the summit for the first time failed to come to an agreement on a joint communiqué. This is the first time in the history of the APEC, when deep fault lines have emerged between the United States and China over the issues of trade.

And while reports of a trade war between these two big trading giants have been in the news for quite some time, what made APEC case interesting is the breakdown of consensus over issues concerning reforms of the WTO. And the WTO has been the most robust and vibrant institution for multilateral trade negotiation that matured and now has faced a virtual freefall. For an Indian professional diplomat to be actually eloquent on the efficacy of WTO just shows how far we have come from the times when we negotiated and participated in the Uruguay rounds or the Doha development round, where we failed to have basic policy space or the special and differential treatment in negotiations that India and Indian delegation or other developing nations constantly struggled to have. Therefore, much of the failure of the WTO can be attributed to unfulfilled commitments on the part of the developed world, issues of the special and differential interest for developing countries, failure to close the Doha round and opening- up of new areas of multilateral trade negotiations, which actually had very little to do with trade and went way beyond, including, for example when it came to TRIPS and the flexibilities that developing countries fought for or on the policy space that we struggled or a sister organisation when it came to TRIPS negotiations was the world intellectual property organisation where

again developing countries had to fight and struggle to lodge a development agenda into those TRIPS plus kind of negotiations ,where we struggled.

However, the disengagement and going back on the abandoned strategies of the trade protectionism is a recent phenomenon, and is not coming out from the developing countries, who actually struggled for that policy space, and therefore is a disturbing trend. Unilateralism or unilateral trade arrangements that give unfair advantages to a few or distort the markets are equally reprehensible. This goes fundamentally against the assertions about free trade, particularly at a juncture when developing countries at large have started observing trade integration as an opportunity rather than a challenge. And I again reiterate that it was a huge challenge for developing countries, including India, that had remained a closed economy where levels of development were inconsistent.

That said, the successful conclusion of the Trade Facilitation Agreement (TFA) was a confirmation of the belief that when countries agree to walk an extra mile to streamline processes that would allow deeper trade integration.

The TFA came at the WTO platform when regionalism and bilateral trade agreements had already picked up. However, the failure in consensus building efforts on several occasions because of the disagreement between the two leading economies caused severe stress for global recovery. It also failed to take cognisance of the fact that growth nodes of the world economy have now got more distributed, and now, in fact, many southern economies, both big and small, are driving GDP growth and world trade.

Another disturbing development has been the clever strategies leveraging this growth potential of smaller economies by institutionalising new aid packages in the form of mega connectivity projects and infrastructure projects, which would have exactly the opposite impact on their growth potential for these very smaller countries. The initial promise of a greater connectivity and robust infrastructure is running the danger of pushing countries into indebtedness towards a few countries compromising sovereignty and democratic participation in the 21st century world order, which is strongly believed to be more accommodating than the last century.

The rise of the Asia-Pacific or the Indo-Pacific, as we would prefer to call it, is currently real, and it is durable. However, conflicts of interest and at times deliberate attempts at deepening of conflicts in the region have made sober nations worried. The RCEP negotiations among the 16 countries in the Indo-Pacific are taking place against this background.

From a political and a strategic perspective, India being a member of the RCEP, which would further reinforce India's Act East Policy. It would also give

a boost to the concept of the Indo-Pacific as an inclusive, open, rules-based order, and it would help strengthen the economic pillar of our relations with the east and southeast Asia. Perhaps, it would take the people-to-people relations to a higher level. And this was reconfirmed and reiterated by our Prime Minister most recently when he participated in the RCEP Summit in Singapore.

That said, whether it is WTO Doha Round or whether it is RCEP negotiations or whether other trading arrangements that India has been participating, call it MERCOSUR with the Latin American region, or with the ASEAN countries, the FTA or even SAFTA, closer home within the SAARC framework, where India because of its immediate neighbourhood, is involved. In fact, one member of the SAFTA negotiations refused to actually honour the commitments it had undertaken in SAFTA and where India again as the biggest country in the entire grouping had in fact made unilateral concessions to the least developed countries of the grouping. We must as Indian negotiators, as Indian experts, as Indian economists certainly take a deeper look even as we participate in all of these plurilateral or multilateral trade arrangements. We must certainly take an assessment, may be a performance audit of where we stand as far as the global trading system is concerned and whether it has worked well for us.

And it is against this background that I shared some of my thoughts which I thought would kick-start discussions in the subsequent segments of the forum. It is my belief that India definitely has benefited and performed better whenever it has traded with the world. Therefore it is certainly in India's interest to ensure a rule based multilateral trading system with equal and equitable burden sharing. After all, nations trade not for trade's sake but as a means to development. Therefore it is important for trading nations to assess their comparative advantages while seeking market access or while negotiating. As such, unilateral moves or anything that distorts trade from the natural comparative advantages that countries enjoy in such trading arrangements is naturally a cause of concern. Of course, trade negotiations are complex and trade negotiators have to assess that while making their commitments they remain mindful of the sensitive sectors. For example, in India it is the agriculture sector or it is the small and micro sectors which create jobs for the poorest segments of the community. These areas are of serious concern to us and that has of course been a concern to us throughout the Uruguay Round, the Doha Round or elsewhere as well whether it was participation in the RCEP or other negotiations.

And I recall that when I was posted in Geneva and as the delegate to UNCTAD, representing India, a constant refrain that I heard amongst the

developing country delegates was about the subsidies. Again there were trade distorting subsidies where it was the developed rich countries that had subsidised their farmers and their farming sector so heavily and were expecting, constantly badgering the developing countries to open up our agriculture sector. I remember at that time some of the negotiators repeatedly reiterating that I would rather be a cow in Europe than a poorer farmer in India or any other developing country. Such was the nature of these trade distortions. And so when it comes to Government of India taking a realistic position on negotiations and very sensitive sectors like agriculture or the micro and medium enterprise sectors, I think it is important for all of us to remain mindful of that very important element because these are directly linked to livelihood issues of the poorest segments of our community.

Therefore while governments must support these sensitive sectors, it is I think not in our interest to make them so dependent that they we must support them to the possible extent. I recall again my days in Geneva where there was anticipation and an expectation that after textiles agreement where the quota free regime would have been removed and India would have been perhaps the biggest beneficiary because we would have perhaps had a complete value chain of the entire textiles and apparel sector. Somehow I think we got our story not quite right and failed to remain competitive, and there are others, including our immediate neighbourhood, Bangladesh, Sri Lanka, Cambodia, Vietnam and others, I can talk of so many other very successful stories about how they did better, and what is it that India can learn from those stories.

Another area of concern of course for us is the growing trade deficit, especially with China and so while you would hear experts again talk in terms of trade deficit or exports need not necessarily be counted only in terms of your exports and imports and sometimes it is good to be part of the value chains and it is good to encourage and allow competition and imports is not such a bad thing because it gives your population access to of source cheaper goods and helps you be part of the entire value chain as well. I think we need to take note of the fact where trade deficit continues to grow to the tune of \$ 60 billion and then India fails to get that kind of desired market access from a country like China. I hope that the symposium, certainly the Indian members or the experts in India, would be able to take a hard look at where is it that India had gone wrong, what is it that we could do better, maybe some kind of a performance audit on whether the efficacy of the WTO or other plurilateral arrangements, including the ASEAN-India FTA. The sense we get is that perhaps we have not benefited as much because it was our expectation that when we negotiated the ASEAN-India FTA in goods. We

expected services and investments as well to have been honoured and committed and implemented. But that has not happened. Meanwhile the RCEP negotiations have started where there is once again pressure for India to open up segments like goods but then other negotiating countries perhaps are not giving us as much comfort on other segments including services and investments. So we need to think and I would urge all the participants today to perhaps have a look at this and see whether these plurilateral arrangements, whether it is WTO, the ASEAN-India FTA or even the various other arrangements that India has with Singapore, with ROK, with Thailand which have moved at different stages of being discussed and whether they have really helped us or whether it requires a course correction for India and for other participating countries. Of course, the course correction need not necessarily be all external. And I am not going to just blame external trading partners or negotiating partners in it. I think we need to also take a hard nosed look at our own abilities and whether we have somehow by over protecting not failed ourselves or not protected the right elements and perhaps failed ourselves. Why is it that we have not become part of the value chains and then given the fact that apart from trade negotiations and participating in the global trade system, we talk about our strengths being the demographic dividend? And whether by protecting ourselves we are not keeping some of our population deprived actually of access to various goods specially, for example, if you were to look at other middle-income countries beyond India and value their requirements of energy needs or nutrition needs and whether we have actually been too protectionist, and that is the reason for it or otherwise.

These are just some of my thoughts. It is not for me to give the solution. I think it is really for the experts present here. I would definitely like to thank JEF and RIS for having organised this very important event. It certainly has a bearing for India as we aspire to transform ourselves into a modern society and leapfrog into the knowledge economy of the 21st century and our efforts at fundamental transformations domestically are matched with greater efforts in contributing to consolidation of the global governance regimes around multilateralism.

Session: I *Trade and New Technology*

AMAR SINHA

Distinguished Fellow, RIS

According to Ambassador Amar Sinha, Chairman for the Session, though manufactured goods have experienced globalisation and trade liberalisation to a great extent, many factors of production are still under the purview of the protectionist tendencies.

On multilateralism, he said that it is inclusive and participative; imparting equal voice and space to everyone, and is based on the system of consensus building. He insisted that multilateral bodies need to take into account SDGs motto of no one is left behind.

On technology, he stressed government's role in providing technology and protection of technical inventions and innovations while balancing employment generation need. He steered the course of discussion by laying down questions on the experience of countries on export-led growth, contribution of high-technology products in trade, level of GVC participation and designing of trade regimes from the global and the regional perspectives to allow domestic capacity-building.

MAN-JUNG MIGNONNE CHAN

Chair and CEO, Out-of-the Box Consultancy

According to Dr. Man-Jung Mignonne Chan, the success of export-led growth in manufacturing sector in East Asia, is determined by production method, skill requirement, nature of production function and external environment. She presented trade performance of some countries for Hi-Tech products. She concluded by giving emphasis on building domestic capacity through less subsidies and more FDI, besides preparing for challenges posed by Industry 4.0. She reiterated that countries cannot escape from facing IPR infringements, and hence rules on IPR are to be tailor-made to reflect domestic capacity of the country.

DATUK SERI JAYASIRI JAYASENA

Former Secretary General, Ministry of International Trade and Industry (MITI), Malaysia

While focusing on the technology in service sector, Mr. Jayasiri said that too little focus on technological advances on telecommunication and connectivity has led to greater divide between developed and developing countries in the region.

Further, he opined that building enabling environment with adequate protection of IPR and supply of skill- set would be essential, and hence countries should collaborate for transfer of technologies. He indicated the importance of the whole supply -chain to be Industry 4.0 compliant. As most of the supply- chain players are SMEs, government has to act as enabler and intervener to help SMEs to gain compliance through legal framework, infrastructure and human- resource development.

He opined that instead of focusing on liberalisation of tariffs, non-tariffs, investments and services, technological development should be given priority. He believes that the region needs to work collectively to make ASEAN a destination for global production and services.

By citing examples of several bilateral agreements, he pointed out that the recent FTAs have provided avenues for collaboration on technological development; thus refuting that FTAs are avenues meant only for trade liberalisation.

MURRAY MCLEAN AO

Chairman, Dunmore McLean Pty Ltd.

Pointing out the advent of Industry 4.0, Ambassador Murray McLean said that the world has irrevocably changed and has impacted on every economy, globally, regionally and locally. Stressing on the need to develop new strategies, he pointed out that open- minded approach called internationalism would only benefit global, regional and national interests.

He highlighted the need for greater liberalisation and facilitation of trade practices combined with IP protection, human capital development and the unhampered availability of ITC at a low cost.

Stating multilateralism and internationalism as strategies for a short -term pain but a long- term gain, he said that nationalism and protectionism are inward looking and negative in global terms, and hence may lead to short- term gain but most probably long- term pain.

SIMON TAY

Chairman, Singapore Institute of International Affairs (SIIA)

According to Prof. Simon Tay, the Sino-American trade issues are broader, deeper and can be prolonged so that the world is potentially at the juncture of a geo-political and regional integration shift. This is a negative sum game for all and there will be disruptions and changes to global value chains. However, he expects that the ASEAN and South Asia might gain, in relative terms, from

these negative conditions.

ASEAN is growing faster than global norms and is integrating. Many who seek a production base in the region, in addition to China, will look to ASEAN. India, in the wake of Act East Policy of India, is another possibility. India has emerged as a force in itself, but is yet to be engaged fully with the rest of the region. After the elections, India's interactions with the rest of Asia can accelerate, and work must continue on the Regional Comprehensive Economic Partnership (RCEP).

For ASEAN, he stressed on the need of the ASEAN to adopt new technologies to save itself from the middle-income trap. He also emphasized on revamping trade agreement from a trade rules-based approach to one focusing on the wider integration, allowing wider application of technologies and new ways of thinking and policy-making for infrastructure, smart cities. There is also a need to allow for service outsourcing and movement of people, and a regional approach for better regulation, so that Asia and ASEAN not only trades more, but moves ahead with economic integration.

NUTTAWUT LAKSANAPANYAKUL

Consultant, Thailand Development Research Institute (TDRI)

Commenting on the low level of internal technology development with R&D expenses of as low as 0.3%, Mr. Nuttawut Laksanapanyakul showed his fear that Thailand may get stuck in the middle-income trap unless it adopts a new developmental model. He suggested that the new model should ensure technological catch up, better use of connectivity and enhancement of labour productivity and environmental protection. According to him, government of Thailand has tried its best to formulate trade and industrial policies to fit in changing environments, like implementation of regional trade agreements with their trading partners, reduction of FTA rates, protection of some key infant industries (e.g. automotive industry), and reduction of tariff rate. He mentioned four eras of development — era of import substitution developing into era of export promotion, followed by era of liberalisation and culminating with era of disruption. Expecting the coming of era of disruption with the rise of protectionism and change in technology, he foresaw the difficulty in exporting products.

Session: II *Imperatives for Regional Integration: Growing Role of Service Sector*

NAOYUKI HARAOKA

Executive Managing Director, JEF

Considering service sector as the key sector to enhance competitiveness of the manufacturing sector, Mr. Naoyuki Haraoka pointed out that trade liberalisation would have much more implications in the service sector than in the manufacturing sector.

He outlined the main expectation from the session by presenting questions on the issues, like the need for leveraging advanced technology (mobile telephony, AI, 3D printing, etc.) in expanding services trade, requirement of additional regulatory firewalls and preparedness in protecting domestic consumers. As well as the need to promote regulatory reform for avoiding the unnecessary burden of regulation. He called for solutions while throwing some light on the ways of dealing with the new disciplines in services trade such as negative list approach, mutual recognition, data privacy, state-owned enterprises, domestic regulations, etc.

CHOONG-YONG AHN

Professor Emeritus, College of Business and Economics, Chung-Ang University (CAU)

According to Prof. Choong-Yong Ahn, promotion of the service trade in the Asia-Pacific region would provide a new growth outlay for digital expansion and job-creation against growth inhibiting protectionism. He reiterated that the service sector liberalisation is likely to reinforce both market-driven cross border supply-chain and trade in services and goods as well as enhance manufacturing and overall economic efficiency. He stressed to upgrade service liberalization clauses in the RCEP negotiations as trade liberalisation measures for the service trade in TPP 11 (to be effective on 30 December 2018) are to be regarded much higher and advanced than those negotiated on the RCEP.

Concerning Industry 4.0 on the service trade liberalisation, he said that there is substantial technological gap between advanced digital economies and developing digital latecomers. The better and well-coordinated service trade policies can stimulate inclusive growth by promoting access to information, skill and technology; especially for SMEs.

With the serious digital divide among Asia Pacific economies, he pointed out the need to create an international cooperation mechanism for digital capacity building for the late comers to ensure service sector liberalisation.

As per Prof. Ahn, rules on regulations on the foreign direct investment need to be harmonised across nations to take full advantage of the regional value chains. However, he showed his concern that it would be difficult for late comers to

accept adoption of negative list system for indirect investment inducement. He especially pointed out flows of international hedge funds through hostile M&As looking for short-term profit needs, which are to be carefully monitored.

He expressed his pleasure that the ASEAN countries have agreed to facilitate cross border e-commerce transactions within the region, and suggested that cohesiveness of ASEAN can be expanded to the existing ASEAN plus one or more FTAs in a win-win framework of service liberalisation. Moreover, prioritising tourism and e-commerce sector, he mentioned that expansion of intra-regional open sky agreement for low cost carriers to fly rather freely in the Asia Pacific would provide a new momentum to regional tourism development. He concluded that making the most out of the digital transformation for trade in goods and services requires a more holistic openness and thinking about measures affecting goods, services and digital connectivity jointly with the measures affecting full value chain.

PRABIR DE

Professor and Coordinator, ASEAN-India Centre at RIS

Dr. Prabir De discussed that India's services trade has grown from US\$ 30 billion in 2010 to US\$ 45 billion in 2016. While India has trade deficit in merchandise with ASEAN, the country enjoys trade surplus in services trade with ASEAN. In ASEAN, India's major services trade partners are Singapore, Malaysia, Thailand, Indonesia, and India's services exports to ASEAN are routed mostly through Modes 1, 3 and 4. Nevertheless, India has high unrealized potential between India and ASEAN in both traditional and emerging services. India has signed ASEAN-India Services Trade and Investment Agreement (AISTIA) - first such agreement by India with ASEAN countries as a block, signed in 2004 but yet to be implemented.

Dr. Prabir De argued that growing ASEAN-India services trade will strengthen the regional and multilateral trade relations. Integration of services is not just for better access in each others' markets but for better collective access in global markets. However, we need to focus on areas where there is alignment between ASEAN Economic Community (AEC) Blueprint 2025 targets and Indian initiatives and interests in services. At the same time, we need to take measures for alignment with AEC and other efforts in the region such as RCEP. Facilitating bilateral investment in services where clear complementarity in capacities and interests on both sides will pave the way to strengthen the services value chains. Therefore, India and ASEAN countries shall explore synergies between manufacturing and services trade (business support, IT,

transport) and role of services in regional value chains. Enhancement of region-wide transport and telecom connectivity is essential in order to spread the services trade.

Countries in the Asia-Pacific may undertake sectoral and issue based cooperation initiatives such as ICT, energy, R&D, health, e-commerce, etc. To deliver onsite or offsite services, Asia-Pacific countries must facilitate mobility of professionals, business visitors, intra-corporate transferees. Regulatory cooperation and exchange of best practices among countries are equally important. Next steps would be to strengthen coordination among professional bodies and mutual recognition of qualifications. Perhaps, countries in Asia-Pacific may consider doing collective development of regulations, regulatory standards and sharing of knowledge, experience and capacity building.

GARY HAWKE

Emeritus Professor, Victoria University of Wellington (VUW)

Speaking on the role of services in economic integration, Prof. Gary Hawke from undertook a different approach and urged that not to consider services should not be considered only as a separate component of trade. The efficiency of the whole services sector is importance to economic integration since services are frequently traded only when they are embedded in exported or imported goods. He stressed on the need for direct contact among regulatory authorities of different economies rather than relying on negotiating among trade officials. He said that one should focus on making effective policies that fulfil the stated objectives and in no way discriminate between production of goods in the national economy and overseas production of goods.

ANITA PRAKASH

Director General for Policy Relations, Economic Research Institute for ASEAN and East Asia (ERIA)

Ms. Anita Prakash focused on the east Asian view of trade in services, and how the east Asia region fared in this area of trade. She pointed the need to understand resiliency inbuilt in trade in services. Despite Asia pacific being called the factory of the world, she said, ASEAN plus 6 and India are not performing badly in the service sector. She supported her point by stating that ASEAN 10 services sector comprised literally one-fourth of the goods trade, China almost one-tenth, India and New Zealand roughly about half, and South Korea one-fifth. Though most economies have roughly about 50% of their

economy in services, she said that when compared to other economies, Asia Pacific region slightly lagged behind, as the EU 28, USA, even Russia. Thus, she felt a huge margin existed for improvement and scope for increasing services contribution in the total trade.

While presenting a comparative view of the trade in services, she said that when by all indication growth is likely to slow down, therefore consumption would become very important driver for growth in emerging economies in the Asia Pacific growth. Therefore exports and imports are very important. She added that along with consumption, political leadership and policies (inflation, social security, and resource allocation) would be vital in the next few years for the emerging economies.

She pointed out that USA, Germany, United Kingdom have a far more diversified services trade than what has been practised in ASEAN. Though some of the countries in the Asia Pacific, including India, are doing pretty well in terms of diversification, she added that ASEAN needs to get its services exports far more diversified than current reliance on sectors such as travel, tourism etc. According to her, future shape of the regional and global economy from a services sector perspective has to be skill based, and hence investment in human resources would be very important. Therefore, she added, investment in skills, training, research and development are very important issues for Asia Pacific. Highly skilled human resource, research and development will be crucial in a post-manufacturing economy, she said, and a whole lot of attention needs to be brought into investments in these areas.

Pressing on the need for policy focus on important areas to advance trade in services, she concluded by saying that Asia Pacific needs to create its own outlook on important policy areas of taxation, corporate reporting, and allocation of financial resource.

SHUJIRO URATA

Dean and Professor, Graduate School of Asia-Pacific Studies (GSAPS), Waseda University

As per Prof. Shujiro Urata, digitisation of economic activities would bring in many benefits and some challenges. He stated examples of digitisation in medical and teaching professions, and claimed that digitisation may replace existing trade in goods and services and may replace actual movement of people. Specifically, he gave an example of 3D printing replacing trade in goods.

By liberalising trade policy, he noted, there would be more competition and as a result non-competitive firms and industry would have to exit from the industry,

and hence economies may have to face challenges coming from increased competition.

To deal with challenges brought about by increased foreign competition, he emphasized government's role in providing trade adjustment assistance programme in the form of technical assistance, education, re-training, temporary protection.

Focusing on datafication, he said that through big data all companies and people can use data collected by many agencies, and that can help them in maximising their objectives. He opined that if the level playing field is provided by government, then SMEs can really benefit from using this big data. Highlighting the negative side of datafication, he pointed out the problems of economies of scale and economies of scope. As a consequence of datafication, superstar firms are likely to emerge unless appropriate competition policies are applied. Datafication may lead to digital wars among companies and also among countries.

The protection of privacy, he indicated, is another challenge. He suggested dealing with all these challenges, it is important to have explicit rules on the digital economy.

ZHANG JIANPING

Director General, Center for Regional Economic Cooperation, Chinese Academy of International Trade and Economic Cooperation (CAITEC), MOFCOM

Adding to discussions on digital economy, Dr. Zhang Jianpin highlighted the importance of e-commerce. He disclosed that the new business model of e-business is booming in China as e-business consumption is climbing up by 30-50% in growth rate every year. He also mentioned the challenges being faced by this new field. He expressed his concern on privacy issues and tax dues for import goods. He is of the opinion that WTO needs to consider how to regulate this type of new business model.

He steered discussion towards Fintech and shared that in China Alipay and WeChat pay are very popular in every aspect, from picking a taxi or paying for goods on web or in a small store. He believes that Fintech can also be another trend for economy and there will be a need to obtain ratified rules and regulations both domestically and internationally. Hence he pressed on the need to provide more training courses and education for human resource development. He concluded by commenting on India-China economic relationship. He said India is good for service sectors and Chinese side is good at manufacturing sector, thus resulting in a complementary relationship. So in this regard, he expressed

his optimism that regional economic cooperation and regional economic integration between China and India can promote better comprehensive economic relationship.

Session: III *Importance and Roles of SDGs in the Indo-Pacific Region: Strategies for Attainment of SDGs*

SACHIN CHATURVEDI

Director General, RIS

Prof. Sachin Chaturvedi started the session by sharing of many new terms mentioned in the literature for describing development strategies of the country in tandem with SDGs, like localisation of SDGs, alignment with SDGs, indigenisation of SDGs, integration with SDGs, mainstreaming of SDGs, adaptation of SDGs and nationalisation of SDGs.

He pointed out that within SDGs indicators, there are three tiers. According to him, the first tier is one where all the members of the United nations can agree, Tier 2 has a set of indicators where the agreement is there but no indicators are identified, and third tier comprises those indicators which are not there or have agreement on them. And then he added that extremely important goals like Goal 16 and 17 are not there simply.

He explained, how SDGs have cross- domain connect; that if one talks about agriculture, one has to take into cognisance water intensity. He said one can learn lessons from the ASEAN as ASEAN Vision 2025 has been aligned with vision for 2030; which reflects key elements of SDGs. At the end, he posed four questions to all speakers— what critical challenges the panel looks at in terms of looking into SDGs for the region; how to define that holistic approach which is required in multi-dimension of poverty that they are trying to address; how to address livelihood and skills problem of the people at the bottom of the pyramid and mechanisms to focus on regional public goods; and how inequality is to be addressed.

YOSE RIZAL DAMURI

Head of Department of Economics, Center for Strategic and International Studies (CSIS)

Dr. Yose Rizal Damuri had set up the context for the importance of sustainable development and related issues in Asia-Pacific. He mentioned that East Asia and Pacific including India has emerged as the fastest growing regions, and there has been greater convergence among economies in the region.

With support of graphical presentation, he showed that though the number of people living under poverty lines has been declining substantially in terms of number and in terms of proportion, the number of people living in poverty especially those living in the vulnerable situations is still huge. Thus, as per him, inequalities have increased which would have negative impact on the economic growth. Based on the UNESCAP data, he said that children from low -income families are more likely to drop- out from school and children from the higher income family are likely to go for secondary or even tertiary education. He further said that many countries are still left behind in having sufficient access to sanitation and clean water.

He highlighted the importance of greater considerations for environmental impact of economic progress and development. He shared the case from one of the islands of Borneo, Indonesia, where the rate of deforestation has been so high that during the last 30 years, from 1973 to 2013, it lost almost half of its forest to economic activities. Neglecting the environmental impact would only cost the society higher than the benefits they obtain from economic activities.

Expressing his belief in the SDGs as a part of the solution, he said that Asia is still falling behind in majority of the goals as per UNESCAP 2017 report. He also pointed towards the increasing challenges in the future, like aging population, as the increasing elderly population in the region is making it more difficult to resolve the issue of sustainable development. He suggested for collaboration of all stakeholders to solve the issues. Though business sector has played very pivotal role in SDGs but they have only limited awareness on the goals, and many goals are not even in their own interest, he emphasized. Similarly, he said that community as well have interest different to private sector or to the government.

He also emphasized that technology may act as a catalyst for opportunities to the low- income families and low-income people, as technological progress would allow greater connectivity for them. He also believed that the new technology is getting easy to be used for economic purposes, with less demanding skills than in the past, which would allow low skills labour force to take advantage of the technological progress.

TRI THANH VO

Economist, Central Institute for Economic Management (CIEM)

Dr. Tri Thanh Vo started by citing example of Viet Nam, where Thirty years ago, 70% of the population was under the poverty line, but now only 3-4% are under poverty line. He added that Viet Nam has become one of the most open economy

in terms of trade and FDI ;which was the closest economy 30 years back.

He focused his presentation on the impact of trade liberalisation and integration on the SDGs, and how integration and liberalisation can be good for attainment of SDGs.

He stressed on the need to learn from ASEAN integration based on three big Cs—community, connectivity and cooperation. He had set a paradigm for smarter regional integration for achievement of SDGs and mentioned four key dimensions, including trade investment liberalisation on and behind the border issues, new trade issues, labour, environment standard and e-commerce, like under the CPTPP or data transaction on that, connectivity and cooperation. He emphasized on the need of institutional capacity, business and people capability in exploiting new opportunities.

JOSEF YAP

Professorial Lecturer, University of the Philippines School of Economics (UPSE)

Dr. Josef Yap listed factors that are sources of global vulnerability. Among them are normalization of monetary policy in the US and EU; escalating trade conflicts; and geopolitical tensions (e.g. Korea peninsula, Middle East). There are localized problems that could cause contagion or spillover effects like the large debt of state-owned enterprises in China. These vulnerabilities can turn into weaknesses largely because of volatile capital flows.

He emphasized that a global financial safety net (GFSN) exists and it has a national component, regional component and a global component, which is led by the IMF. The role of the GFSN encompasses crisis prevention and crisis management.

The GFSN has many weaknesses: lack of resources of the IMF, the latter's reputation and credibility problems, especially after the 1997 Asian Financial Crisis, and inadequate resources of the Chiang Mai Initiative Multilateralization (CMIM).

He argued that because of these weaknesses, countries have relied on self-insurance. They had built up their foreign exchange reserves that led to a sharp increase in foreign exchange reserves, roughly starting after the 1997 AFC. The cost of this build-up foreign exchange reserves is lower investment and lower resources allocated to promoting sustainable development goals. Hence, improved regional cooperation is the main solution. Improving the structure of the CMIM and also enhancing the credibility of the IMF are important.

SAIKAT SINHA ROY

Professor, Jadavpur University, Kolkata

Globally though absolute levels of inequality might have come down, Prof. Saikat Sinha Roy claimed that for individual regions, especially in Asia-Pacific, there has been significant increase in inequality; between 1990s and 2000.

Using graphical presentation, he showed that in many Asian economies like India, Indonesia, and Viet Nam there was a marginal decline, but in most of the Asian countries, a significant increase in inequality from 1990s to the 2000 was noticed.

When he analysed the matter, he found that all these economies had been leapfrogging towards more of services. By measuring structural change in terms of changes in the share of manufacturing, he found that only in low- income countries and in lower middle-income countries, increase in the share of manufacturing actually led to increased inequality.

He pointed out that with regards to structural change in terms of share of services in the GDP, one would see that low-income countries, lower middle-income countries and upper middle-income countries, to which most of the Asian economies belong, there is increased inequality by 8.53% when share of services to GDP increased by 1% . Hence he concluded that leapfrogging towards services sector has actually exacerbated inequality in the Asian countries, including the Pacific countries.

He suggested macroeconomic policies, including trade, FDI, infrastructure, and connectivity as well country specific interventions as possible ways to reduce inequality. He further added that fiscal policies in the form of cash transfers and subsidies, minimum wage protection, social protection policies along with empowerment of the marginalised, as mentioned in SDG 10, can be effective in reducing inequality.

He also opined that policies are to be designed towards MSMEs with special focus on the micro sector and skill development through education. He suggested policies supporting more trade, FDI, more of infrastructure and connectivity. He also pointed out financial inclusion and building of institutional capacity in weaker countries which lack institutional capacity can possibly lower income inequality.

(End)

7. 発表資料

公開フォーラムの発表資料（パワーポイントスライド、トーキングポイント）

Session 1 : Trade and New Technology

- ① Dr. Man-jung Mignonne Chan
- ② Datuk Seri Jayasiri Jayasena
- ③ Amb. Murray McLean AO
- ④ Prof. Simon Tay
- ⑤ Mr. Nuttawut Laksanapanyakul

Session 2 : Imperatives for Regional Integration: Growing Role of Service Sector

- ⑥ Dr. Choong-Yong Ahn
- ⑦ Dr. Prabir De
- ⑧ Prof. Gray Hawke
- ⑨ Ms. Anita Prakash
- ⑩ Prof. Shujiro Urata
- ⑪ Dr. Zhang Jianping

Session 3 : Importance and Roles of SDGs in the Indo-Pacific Region: Strategies for Attainment of SDGs

- ⑫ Dr. Yose Rizal Damuri
- ⑬ Dr. Vo Tri Thanh
- ⑭ Dr. Josef Yap
- ⑮ Prof. Saikat Sinha Roy

これらの発表資料は、当財団のホームページに掲載されています。

Trade in the Era of Industry 4.0

Dr. Man-Jung Mignonne Chan

2018.11.22.

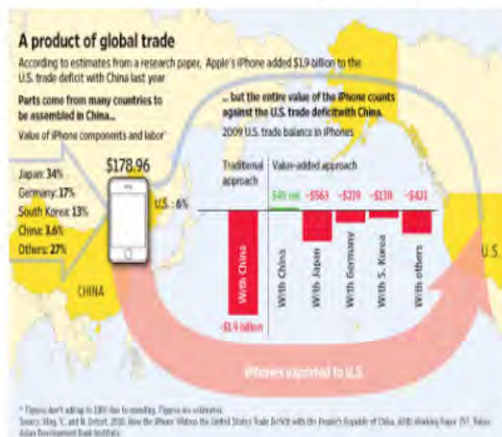
Contents

- Portfolios of Export-Led Growth in the Manufacturing Sector
- Contribution of High-Tech Products in Trade Performance
- Level of GVC (Global Value Chain) Participation & Value Addition
- Designs for Regional & Global Trade Regimes to Allow Domestic Capacities

East Asian Cases of Export-Led Growth in the Manufacturing Sector

- East Asia:
 - Mid-1960s & 70s in : the Flying Geese, led by Japan, include the Four Dragons (S.Korea, Taiwan, Singapore, HK)
 - 1980s: the 2nd tier NIEs (Newly Industrial Economies) which include China, Malaysia, Indonesia, Thailand, Viet Nam.
- Level of Success is determined by:
 - Production Method: Modern technology enable the spread of technical knowledge, skill training of labor to other industries;
 - Skill requirements: skilled workers have better job mobility, source of entrepreneurship, and save more wage income.
 - Nature of Production Function:
 - Capital-intensive: more inclined to cause income inequality;
 - Labor-intensive: increasing employment & income.
 - Fluctuation in world trade & global economic environment

Hi-tech Products & Trade Performance: the Case of iPhone

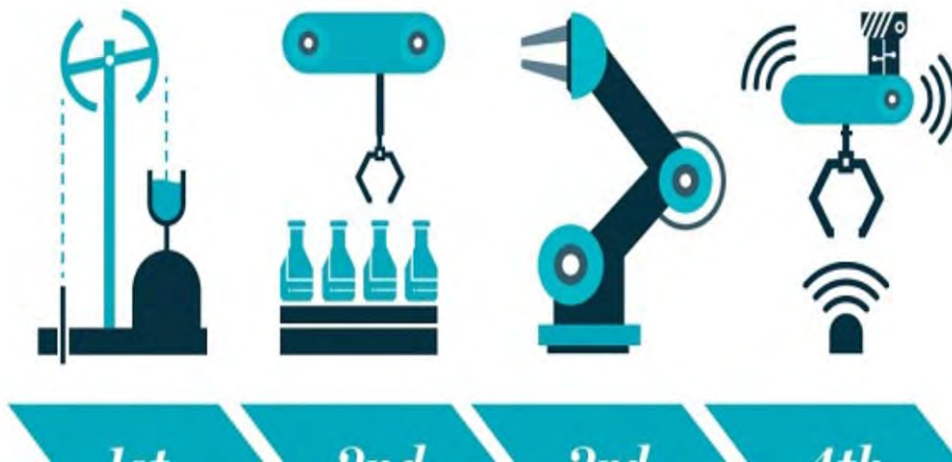


- U.S.: Software R&D and hardware processors, and Marketing;
- South Korea, Japan: Displays
- Germany: Barometric Pressure Sensors
- Taiwan: touch ID sensors
- China: Assembly
- the iPhone alone added \$17 billion to the 2016 trade deficit with China, even though the vast majority of its inputs came from elsewhere.

Two Key References on Technology: WB & OECD

- 2017.09: the World Bank published "*Trouble in the Making? The Future of Manufacturing-Led Development*,":
 - It identifies policy priorities at a time when smart automation, advanced robotics, 3D printing, and other advances are changing how cars, electronics, apparel, and consumer goods are made – and how nations compete for production and international trade.
- 2017: the OECD report, "*The Next Production Revolution: Implications for Governments and Business*":
 - "Public understanding and acceptance of new production technologies also matter. ... Policy makers and institutions should voice realistic expectations about technologies and duly acknowledge uncertainties."

Challenges of Industry 4.0: the Era of IoT



Policy Agenda to Meet the Changes in Manufacturing

- **Competitiveness:** from a low-wage focus to broader business environment, i.e., the rule of law and the use of technology to develop firm ecosystems;
- **Capabilities:** Skill-Building for Workers, Firm-Strengthening, and Infrastructure-Development for Technologies;
- **Connectivity:** logistics-enhancement, lower trade barriers to goods & services. National security related import or export restrictions should be duly scrutinized.

GVCs Participation & Value Addition (1)

- Countries with a higher degree of integration into GVCs (higher use of foreign intermediates in exports) in the 90s, have increased the share of domestic value added in their exports over time.
- Policy Adaption for different stages of GVC integration:
 - “learning by importing” with lowering barriers to import, and
 - enhancing sectoral competitiveness & exploiting comparative advantages;
- Sectoral Difference:
 - Some with upstream upgrade, such as the services for Mining and Quarrying sectors.
 - Support services could enhance competitiveness levels by moving toward more open domestic policies.

GVCs Participation & Value Addition (2)

- To define GVC integration strategies and policies: It is essential to comprehend the structure and characteristics of sectors, including managing expectations in terms of economic transformation, and creating buffers for potential shocks throughout domestic and international value chains; including absorbing risks by diversification of FDI, and forging sustainable transformation of all sectors.

Design Trade Regimes To Allow Domestic Capacity

- Remedies to account for trade imbalance figures; subsidies, restrictions on import & export;
- “Implementation Gap”: For lack of domestic capacity, many well intended RTAs cannot be implemented due to weak “rule of law” & insufficient infrastructure, especially when the 2 interact.
- Domestic capacity—both physical and institutional – often requires less subsidies & more FDI and institutional capacity-building for the challenges of Industry 4.0.
- IPR: All cannot escape from being a victim of IPR infringement, even though the rules should be tailored made to reflect domestic capacity.

謝謝！ Thank you!

詹滿容

Dr. Mignonne Chan

mignonne@out-of-the-box-consultancy.com

solitude4music@gmail.com



Out-of-the-Box
Consultancy

INTRODUCTION

Technology is often discussed in the context of manufacturing sector in most countries. Much efforts and resources are put to monitor, develop and acquire this type of technology. This is mainly in the improvement of processes that lead to greater mechanisation or automation. Very little emphasis is given to the non tangible technology advances especially in the services sector. For instance technological advances leading to greater utilisation of the invincible advances in communication and connectivity. This has led to the increase in the technology divide between countries as current advances in technology is premised heavily on digitalisation. If this is not rectified then the move towards IR 4.0 adoption will be jeopardised

TECHNOLOGY TRANSFER

Many developing countries lament that there is hardly any technology transfer by developed countries. Technology transfer will not take place if the enabling environment in the recipient country is lacking. There must be adequate protection of IPR, sufficient skilled personnel for tech transfer to take place. Policies on tech transfer must be based on collaboration and not a mere demand that foreign investors transfer technology for getting licence to invest. The rules in the WTO already prohibits such performance requirements. No proprietor of technology, especially ones that have spent considerable resources, will easily give away their secret receipies.

INDUSTRY 4.0

This seems to be the buzz word in many capitals. Some governments are concerned while others think this phenomena will find its own course and industries will manage, just as as how the first three industrial revolutions evolved. The difference now is that in order for companies to be productive, it is not sufficient for them alone to embrace the I4.0 elements, but the whole value chain must be IR 4.0 compliant. In an environment where more than 90 percent of the enterprises are SMEs, can they be compliant without any intervention? This is where the government must come in as an enabler to assist smaller companies embrace IR4.0.

Adequate plans must be rolled out to provide the institutional and legal framework; infrastucture especially to facilitate internet access and digital utilisation; human resource development, bearing in mind the workforce of the future will need a whole lot of different skillsets. In addition to all these, incentives, not necessarily financial in nature, must be provided to these small companies to speed up their adoption of

IR4.0.

REGIONAL DEVELOPMENTS

So how are we coping in the region?

It is a cause for concern. Not much political attention is given at the regional level collectively, although at the domestic level some countries have rolled out clear plans. At the regional level, a lot of attention is still given to traditional issues of tariff and non- tariff measures, services and investment liberalisation. Bureaucrats are either not familiar with the subject matter or do not see the urgency to have regional collaboration in embracing IR 4.0. In aspiring to be a manufacturing and services hub, many companies are in the supply chain and rely on each other. Imbalance in technological advancements need to be addressed. The region needs to work together to keep pace with developments or else they could be easily kept out of the global value chain, hence jeopardising the greater trade and investment goals.

TECHNOLOGY and FTAs

Many still criticise FTAs as market opening tools that do not allow technology collaboration. This is not true. Recent high standard agreements have provided the enabling environment that fosters technology collaboration. The Malaysia -Australia FTA was fully utilised by the auto industries of both countries to jointly work to upgrade capacity and quality in parts and components production.

③Amb. Murray McLean AO

Asia-Pacific Forum 2018

Public Symposium on

“Protecting the Global Trading System and the Role for Multilateralism”

Panel comments: Murray McLean – 22 November 2018

Panel Session 1: Trade and New Technology

In recent weeks the world has heard from the ASEAN/EAS summits in Singapore and the APEC meetings in PNG echoes of trade-related debate centering on the concepts of protectionism and nationalism versus the alternatives of multilateralism/internationalism.

Australian Prime Minister Scott Morrison in his recent speech at APEC, PNG/2018 “Tit-for-tat protectionism and threats of trade wars are in the interests of no-one economically and they undermine the authority of the global and regional trading rules that benefit us all”

The well-recognised historian Yuval Noah Harari in his recently published “Lessons for the 21st Century” tackles the concept of globalisation as a counter-balance to the realities of our global ecology, global economy and global science currently “stuck with national politics”. He is not advocating a global empire or global government, nor is he anti-nation. He strongly promotes awareness of a dissonance in our global realities. His ideas are directly relevant to contemporary trade issues. Harari also counsels us not to be distracted from more serious questions by e.g. debates over trade regimes. He says: “the conversation should be about climate change, technological disruption, AI and bio-engineering. These are the big issues.” He advocates regulation of AI by a strong cooperative global community.

French President Macron in his November 2018 Armistice commemorative address, noted the difference between individual nations having a sense of identity and patriotism, but morally willing to share endeavors equitably with others, and nationalism, which he described as selfish in its exclusion of others’ interests, lacking in ethics and looking only to dominate.

It is critical to observe and accept that with the arrival of Industry 4.0, the world has **irrevocably changed** especially in the past decade – at different rates, but increasingly faster as if in a domino cascade - affecting every national economy,

globally, regionally and locally.

Implications of this are:

- **The whole human world view and human relationship to our environment has already changed**, a process which the power of algorithms and biometric-data capture in technology applications will only increase
- **History** is a valuable teacher but cannot from its menu of past practices deliver any substantial, sustainable contemporary and future solutions to new challenges, some possibly not even yet imagined. **We have to seek new alternatives.**
- **Change** at a very fast pace may be the **only constant and universal factor.**
- **New strategies** for negotiating stand-offs, capable of considering all options and antagonistic viewpoints must be developed. Time must be given to the deliberation without overly-hyped pressures to produce consensus communiques.
- **NOTE:** Dystopian, stereotyped world views of others, which limit insights into how any problem is being viewed variously by the parties involved, must be avoided.
- Global, regional and national interests benefit from the open-minded cooperative approach termed internationalism (as distinct from nationalism)
- Greater liberalization and facilitation of trade practices is implied, together with IP protection, human capital development and the unhampered provision of IT/communications available universally at low cost
- Soundly developed, equitable regulatory frameworks and open dialogue are necessary

Nationalism compared with Multilateralism/Internationalism

Each nation's government and policy makers are the key drivers of trade policy. They will look to business to create, "innovate" and invest in development, but the game-changers playing the end game moves are governments. Hopefully, national leaders pursue sustainable, substantial global trade development equitably. Inclusivity is a valued modern leadership attribute

It is useful to review the ideas in conflict when we consider so-called trade wars

Nationalism – is linked to popular domestic support and confidence in economic strength

- Closes borders and prejudices trade competition
- Limits opportunities for others building their own domestic production capacity
- Inhibits spread of trade benefits and economic development outcomes
- Delivers initial advantages that lead to disruptive outcomes long term

- Loses sight of any bigger picture losing certain opportunities as a result
- Uses fear-mongering as a political tool and trade as a weapon
- Encourages distrust and builds disgruntlement

Internationalism – thrives on and drives global trade dynamics

- Strengthens weaker regional players' chances of participation in GVCs
- Capitalizes on geography and resources
- Delivers advantages and shared benefits longer term
- Encourages education, skills training, international exchanges and human capital development
- Encourages R&D and business management know-how transfer
- Broadens industrial options and employment opportunities
- Thrives on and enhances political stability despite fears to the contrary
- Builds and upgrades localisation opportunities
- Encourages equitable, open, independent, tolerant thinking
- Benefits land-locked national economies
- Relies on increased liberalization and facilitation in regulatory frameworks

Where there is tension between these two viewpoints

- Trade often becomes connected (married) with another term – security
- The measurement of economic national development and criteria for application of any regime benefits related to development can be a point of disagreement
- Any one nation can unilaterally introduce protectionist barriers e.g. tariffs, closed borders, against any other economy
- Management of IP-related regulations may weaken (ethics) in a competitive environment
- Increased difficulties may arise in reaching agreement on ethical aspects of new technologies (especially biotech)
- Multilaterally agreed limits may be exceeded or ignored by any one nation
- Changes in national leadership may further aggravate disagreement or improve relations
- Short-term costs will be balanced against long term gain (survival?)
- Disagreements will be diverse in origin but may be generated by
 - differences in world view for any reason
 - dissonance
 - disgruntlement
 - dystopia
 - distrust
 - dreams of power/control

- disengagement
- denial of opportunity
- disparities generally

Internationalism usually demands agreement on multilateral trade regimes which

- emphasise simplification and better risk management in trade
- deliver altruistic preferential agreements appropriately, and discourage illegal and non-conforming trade practices
- need to achieve and optimize
 - open door access to markets with transparent regulatory frameworks/policies
 - reduction of all barriers
 - logistics, transport, customs and cross-border efficiencies
 - reduced costs of trade
 - investment and finance opportunities
 - stable government and legally-backed trade liberalization and facilitation
 - promulgation of transparent and reasonable host/guest investor protocols
 - comparison and resolution of any domestic national economy disparities in development.
 - Growth in productivity will provide the benefits that can more widely be shared. HOWEVER, weaknesses in distribution of benefits from increased productivity persist at every level, local or regional

Trade in new technologies

- TRADE (both export and import) continues as a key driver of economies, but would be weakened if new protectionist policies (barriers, tariffs, attitudes) were implemented. Key drivers of productivity and trade will emerge from space, defence and biotech/biomed research
- Each regional economy is looking for new export opportunities, especially at the Industry 4.0 level
- Cooperative global regulation of key new technologies e.g. AI is critical
- Services are an increasing driver of economic growth including exports
- New domestically-produced products have to achieve market entry, branding recognition and take-up in offshore markets and possibly investment
- Each national economy must learn how to succeed in other markets, and failure to do this will create market vulnerability regardless of any barriers imposed or not
- This learning curve can be a weak point even without barriers being imposed

- Trade opportunities will increasingly be captured with new technologies and products
- Product trust and recognition must be built in overseas markets and participation in open-minded multilateral forums and regimes is advantageous

Increasingly business models will shift from “**heavy**” (with traditionally manufactured material products ready to buy in retail venues) to “**light**”, increasingly involving e.g. globally-shared intelligence which is characterised by

- no longer stored in silos, but in a global information ecology accessed by multiple users/apps
- service/experience related delivering dramatic shifts in lifestyle/work patterns
- digital marketing and product-life service upgrades e.g. auto shift in business model

Outcomes from implementation of new (Industry 4.0) technologies

- Efficiencies in traditional trade and manufacturing as long as they continue to exist
- Increased governance demands
- Availability of new goods, services, employment options (old products, services, jobs will disappear)
- Economic vision is required to capture opportunity (curiosity/creativity/connectivity – refer Tesla electric car CEO leadership)
- Emergence of major lifestyle/work style changes - longer lifespans
- Trends to increased automation - new tools
- Stress on lifelong re-education, adaptation to, and adoption of, change
- Familiarity with expanded world horizons
- Increased competition for resources – water, energy, food, raw materials – change in physical environment management
- Reinvention of construction for commercial, residential, industrial purposes
- Increased mobility, transport and logistics options
- Potential power struggles to gain control of vital national interests
- At every point costs will be balanced with gains



ASEAN Economies in a New Context
Geo-Politics, Trade, Technology and Integration

Prof. Simon Tay
Chairman, Singapore Institute of International Affairs

JEF-RIS joint Asia-Pacific Forum 2018
**"Protecting the Global Trading System and
the Role for Multilateralism"**
November 22-23, 2018 in New Delhi

Experience and Context

Flying Geese pattern,
Asian crisis and China

China-hub, AEC and Post-
GFC Asia

India's Predicted
Emergence

The Sino-American
"trade" war and Options

Globalization under
Attack



Growth, Technology and People

ASEAN's present and future as middle income.

Transition to future production for value and innovation.

Industry 4.0 technology impact on jobs and competitiveness

Social Policy and Leave No One Behind – People and Regions

Beyond tech sectors -- Agriculture and Resource



Redesigning Trade Agreements

From trade to integration

Wider application – Infrastructure, Smart Cities Networks

Filling Gaps -- Service Outsourcing and Movement of Persons

Regional Regulatory Cooperation

Main regional economic cooperation forums and FTAs involving Asian countries



APTA: Asia-Pacific Trade Arrangement; APEC: Asia-Pacific Economic Cooperation; ASEAN: Association of Southeast Asian Nations; CEIS: Common External Inter-Regional System; EAS: East Asia Summit; FTAAP: Free Trade Area of Asia-Pacific; RCEP: Regional Comprehensive Economic Partnership; TPP: Trans-Pacific Partnership; TISA: Trade in Services Agreement; TISA: Trade in Services Agreement; TISA: Trade in Services Agreement



THAILAND DEVELOPMENT RESEARCH INSTITUTE

TDRI
<http://tdri.or.th>

Trade and new technology: Technological catch-up for Thailand's automotive sector

Nuttawut Laksanapanyakul
22 November, 2018

TDRI Thailand needs a new development model

'Escaping the middle income trap by getting rich and healthy before getting old'

27% are high-technology exports but R&D accounts for only 0.3% of GDP

Industrialization
without adequate internal technological development

Technological catch-up

Export-led growth
Exports are 64% of GDP and GVC participation rate jumps to 54%

Exploitation of low-wage labor and environment
Domestic value-added is 4.2% and 8.6% of Thai are under poverty line

Utilization of connectivity

Enhancement of labor productivity and environmental protection

Source:

- WB's high-technology exports 1996-2016;
- UNESCO's GERD 1996-2015 & STI's GERD 2016
- WB's export-GDP ratio 1996-2016;
- OECD's GVC participation rate 2011;
- OECD's trade in value-added 2000-2011;
- NESDB's poverty 2015

2

Lessons learned from the past

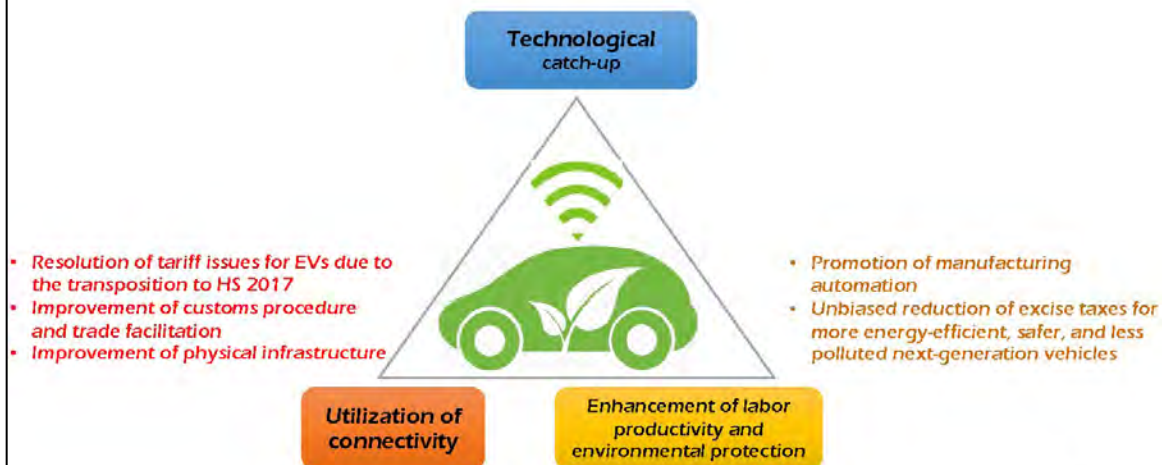
'Even with some difficulties, trade and industrial policies for the automotive sector, Thailand's top priority, have been impressively implemented in response to changing environments'



Ways forward for Thailand's trade and industrial policies

'Apart from protectionist policies in other countries which are out of Thailand's control, the following country's trade and industrial policies are of importance'

- Reduction of tariffs for key raw materials (e.g. battery, motor, lightweight composite)
- Service liberalization and investment facilitation (e.g. embedded software, system integration)
- Promotion of RD&I activities through grants, tax and non-tax incentives



TDRI

สถาบันวิจัยเพื่อการพัฒนาประเทศไทย

THAILAND DEVELOPMENT RESEARCH INSTITUTE



<http://tdri.or.th>



[facebook/tdri.thailand](https://facebook.com/tdri.thailand)



[@TDRI_thailand](https://twitter.com/TDRI_thailand)

-Draft-

Talking Points at the Session 2 of the Asia-Pacific Forum, *Imperatives for Regional Integration: Growing Role of Service Sector*, November 22, 2018, New Delhi, organized by the Japan Economic Foundation

Choong Yong Ahn

Distinguished Professor, Graduate School of International Studies
Chung-Ang University, Seoul

Asia pacific economies are now facing serious challenges to overcome rising and unabated protectionism and a turbulent global trade order. Against the far-reaching negative consequences of on-going trade war between the US and China, intra-regional free trade agreements in the Asia-Pacific, still pending, need to be effective and concluded expeditiously to ensure a predictable rule-based open free trade regime and to create reciprocal intra-regional demand for goods and services.

It is increasingly clear that promotion of service trade in the Asia-Pacific region would provide a new outlet for needed trade expansion and job creation against growth-inhibiting protectionism. Evidence suggests that the service sector liberalization is likely to reinforce both market-driven cross-border supply chains and trades in services as well as goods while enhancing manufacturing and overall economic efficiency. The expanded trades in goods and services would benefit the consumers in the region.

As the CPTPP is going to be effective on December 30 in 2018, the RCEP needs to be concluded as early as possible to exert trade and investment liberalization and facilitation in parallel with CPTPP in the Asia-Pacific, otherwise slowing down of intraregional trade. The liberalization measures for the services trade contained in the CPTPP include a non-discriminatory treatment of digital products, cross-border transfer of information by electronic means, non-conditionality of location of computing service, and transfer or access to source code of software are regarded much higher and advanced than the those being negotiated in the RCEP. While speeding up the RCEP negotiation, the services liberalization clauses in the RCEP need to be upgraded as much as possible. In this context, the RCEP needs to address more clearly harmonization and streamlining non-tariffs measures and other services trade inhibiting regulations.

On the impacts of the 4th industrial revolution, namely digital revolution, on the

service trade liberalization, there exist substantial technological gaps between advanced digital economies and developing digital latecomers.

Without capacity building on the part of developing economies, aggressive cross-border digital liberalization is likely to face their strong oppositions because developing economies are bound to remain at a low value added echelon of cross-border supply chains and to become victims at the whim of global digital MNCs.

As the OECD secretary general put it, “Open and well-regulated services markets are the gateway to global value chains. Services trade policy reform can boost SMEs, reduced trade costs, and strengthen the digitalization of economies. Better and well-coordinated services trade policies can stimulate inclusive economic growth by promoting access to the information, skills, technology, and funding especially SMEs. Given the serious digital divide among Asia-Pacific economies, we need to create an international cooperation mechanism for digital capacity building for the digital latecomers to ensure the meaningful service sector liberalization.

On the new disciplines in the service trade promotion and regulatory reforms:

1. It has been noted that reform efforts for services trade policies from 2014-2016 have induced a liberalization trend in all countries, but revealing that some sub-sectors have, on balance, greater restrictions. Nevertheless, all countries have areas of good performance, which could be a model for others.
2. Beginning in February 2012, 50 advanced countries began negotiating the Trade in Service Agreement (TISA) for further liberalization of key sub-sectors including financial services, healthcare, and transportation. The TISA would also expand “regulatory disciplines” on all service sectors including public services. The discipline would provide all foreign providers access to domestic markets at “no less favorable” as domestic suppliers. This discipline might serve the profit interest of private and foreign corporations. Given the trade uncertainty, the TISA is not likely to progress as observed since early 2016. There needs to be a balance of public interest of host economies and profit making interest of private and foreign companies. Therefore, we need to adapt strategic reforms across a spectrum of trade, investment, and competition policies to facilitate trade in services.

3. Given the complexity and service sector opening, we need to prioritize to target bottlenecks in transportation and logistics services to increase the visible trade in goods by reducing logistic costs.
4. Rules on regulations on FDI need to be harmonized across nations to take fuller advantage of on-going regional value chains. However the adoption of negative list system for FDI inducement across nations would be very difficult for digital latecomers to accept. Especially, the flows of international hedge funds especially through hostile M&As, which are looking for short term profits need to be carefully monitored.
5. Another concern is the increasing number of investor-state disputes. In order to mitigate ISD cases, a post investment aftercare services are important. Korea's foreign investment ombudsman system has been benchmarked by several countries in the world.
6. The "Internet of Trust" is now the main theme of the forthcoming UN Internet Conference. Annual freedom house study finds a great surge in digital authoritarianism, Global internet freedom has declined for the 8th consecutive years. The trend needs to be reversed

It is great that ASEAN countries agree to facilitate cross-border e-commerce transactions within the region. That cohesiveness of the ASEAN could be expanded to existing ASEAN plus one or more FTAs in a win-win framework of services liberalization.

The mode 4 of General Agreement of Trade in Services (GATS) is the most regulated. The more professional skills and trainings are involved in the cross-border movement of natural persons, the less likely to adopt mutual recognition system. We might start some easy ones such as translator services for tourism.


On the most promising service sectors for common development, tourism and e-commerce could be prioritized because there exist relatively less "WATER" between liberalization and concessions allowed by domestic laws and binding clauses by international agreements. Smokeless and rising demand for tourism and e-commerce would be equally enjoyed by consumers in developed and

developing economies in the region. Expansion of intra-regional open sky agreements for low cost carriers to fly rather freely in Asia-Pacific would provide new momentum for regional tourism development.

Today, the internet and information technology is also creating volatility, uncertainty, complexity, and ambiguity. Data privacy and information security is increasingly important while pursuing the cross-border use of data. Individual privacy preferences and their personally identifiable information such as health records, financial institutions and transactions, residence and geographical information, etc, need to be protected. The EU's General Data Protection Regulation (GDPR) should maintain a balance between privacy and economic competitiveness.

In conclusion, making the most out of the digital transformation for trade in goods and services require openness more holistically, thinking about measures affecting goods, services, and digital connectivity more jointly, and about measures affecting the full value chain, including the enablers of digital trade and tackling all these through international cooperation,


⑦Dr. Prabir De,



Connecting Asia-Pacific: ASEAN-India Services Trade – Economic Assessment and Policy Options

**RIS**
Research and Information System
for Developing Countries
विश्वव्यापी सेवा मंडल अनुसंधान एवं सूचना केंद्र

Asia-Pacific Forum 2018

**JEF**
Japan Economic Foundation

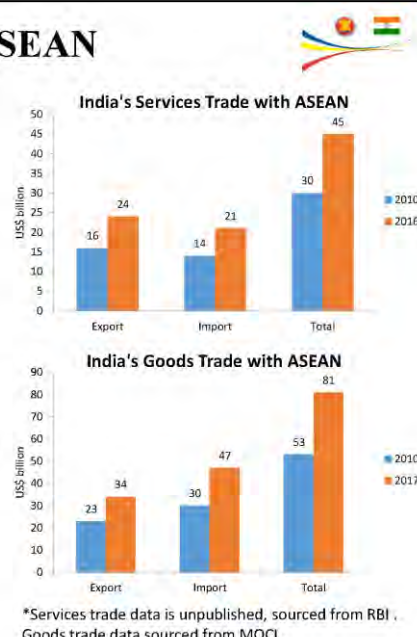
Public Symposium on
Protecting the Global Trading System and the Role for Multilateralism

Prabir De
ASEAN-India Centre (AIC), RIS

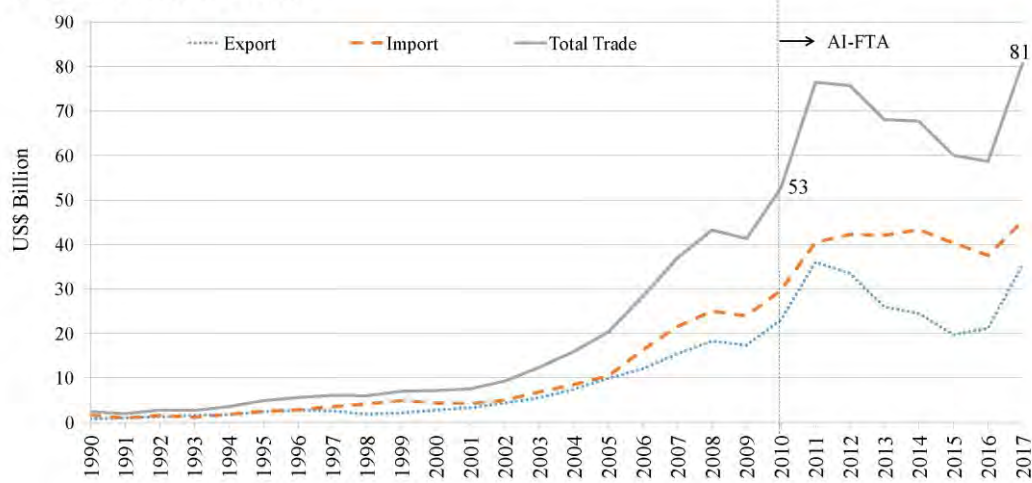
22 November, 2018, New Delhi

Overview of India's Services Trade with ASEAN

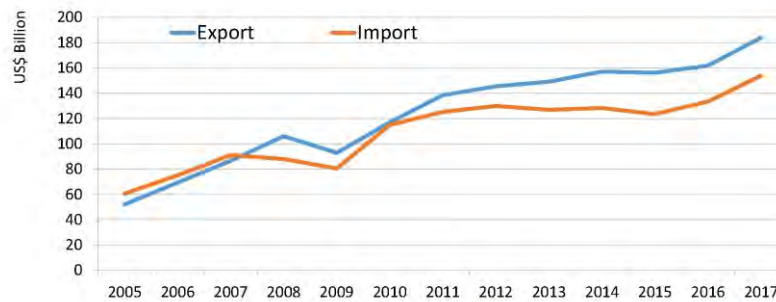
- India's services trade has grown from US\$ 30 billion in 2010 to US\$ 45 billion in 2016.
- India has surplus in services trade with ASEAN
- India's major services trade partners are Singapore, Malaysia, Thailand, Indonesia
- India's services exports to ASEAN are via Modes 1, 3 and 4
- High unrealized potential between India and ASEAN in both traditional and emerging services
- India has signed ASEAN-India Services Trade and Investment Agreement (AISTIA) - first such agreement by India with ASEAN countries as a block, signed in 2004 but yet to be implemented
- Expected to strengthen business and commercial relations between ASEAN and India, and also with Asia-Pacific region



FTA has made positive impact on goods trade between ASEAN and India

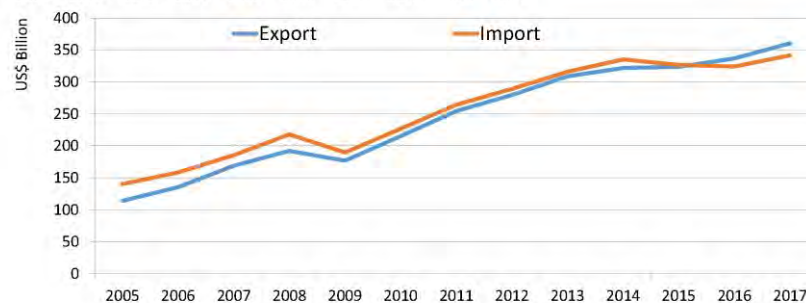


Source: DOTS, IMF



Trends of India's Trade in Services with the World

Trends of ASEAN's Trade in Services with the World



Source: UNCTAD Database

Services Trade Structure of ASEAN and India in 2017

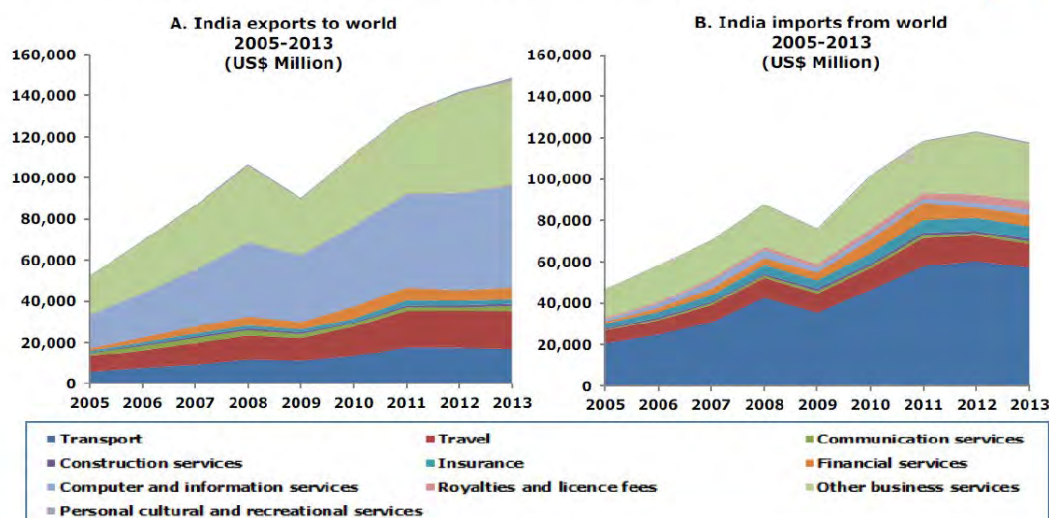


(US\$ Billion)

	India		ASEAN	
	Export	Import	Export	Import
Total Services	183.98	154.01	360.54	342.69
Travel	27.36	18.43	130.45	72.38
Other business services	58.96	35.40	79.54	84.78
Transport	16.98	57.10	66.78	101.93
Financial Services	4.49	5.80	25.41	8.18
Telecommunications, computer, and information services	54.86	6.07	21.91	20.16
Charges for the use of intellectual property	0.66	0.65	8.73	29.21
Maintenance and repair services n.i.e.	0.22	0.51	8.06	1.82
Insurance and pension services	2.46	6.29	6.96	14.49
Manufacturing services	0.11	0.04	6.04	0.08
Construction services	2.28	1.22	3.02	6.28
Government services, n.i.e	0.62	0.64	1.90	1.62
Personal, cultural, and recreational services	1.47	2.14	1.76	1.76

Source: UNCATAD Database and ASEAN Secretariat

India's Total Commercial Services Trade, 2005-2013



Source: Chanda (2018)

India's Trends and Inferences in Services Trade



- More subsectors committed by India at bilateral level compared to that under GATS
- Closer analysis of India's services trade trends vis-à-vis the world indicate a few areas of strength
- In terms of value, growth and a favourable trade balance, computer and information services stands out
 - Consistent trade surplus in computer and information services
 - Other business services have also performed well, favourable trade position
- Weak subsector in transport services where there is a persistent (and largest) trade deficit
- Gradual improvement in the trade position in travel services
- In other subsectors, performance is mixed, magnitudes are relatively smaller and changes in the trade position are not as significant

Bilateral Trade Trends



- US and the UK account for more than half and even two-thirds of India's exports in services sectors
- Only with Singapore, there is significant trade across a variety of services
 - financial and insurance, communication services, other business services, computer and information, travel, transport services for imports
 - computer and information, travel and transport services for exports
- With some countries like Vietnam, the basket is totally concentrated in one or two segments, indicating scope for gains through increased extensive and intensive margins in services trade with ASEAN

	Sectors having rising trade
Singapore	Travel and tourism, Transportation, financial and insurance, IT, Communication, Education, Health
Thailand	Travel and Tourism, Manufacturing services
Malaysia	Travel and Tourism, Manufacturing services, IT, Education
Indonesia	Travel and Tourism

India's Interests and Possible Gains



- Computer and information services and other business services are the key areas of strategic interest for India's exports
- Export potential exists in segments such as financial services and travel services given the growing favourable balances and relatively small magnitudes
- Main areas of import interests are likely to be transport services, construction and other business services
- India's possible gains are in services exports under any broad-based FTA, which is likely to hinge on its ability to remove barriers affecting IT and other business services
- Potential gains from imports exist in critical intermediate services such as logistics, construction, business activities, which are linked to manufacturing, where investment presence may play an important role

	RCA>1
ASEAN	Transport, Tourism, Financial
India	Information & Technology; Other business services

*Calculated based on UNCTAD Stat;
RCA – Revealed Comparative Advantage

Why ASEAN still Restrictive Services Trade Market?



- Though there are much potential to expand trade and investment relations, prospects are not promising given lack of progress on similar market access issues within ASEAN
- ASEAN countries themselves unable to meet target dates for removing restrictions on services trade
- Services liberalization under ASEAN has no commitment to address behind the border issues
- Continued regulatory divergence among member countries
- Limited progress in promoting cross-border movement of labour within ASEAN region
 - Efforts so far limited to mobility of skilled professionals, which have too much problems in terms of requirements imposed by some member countries
 - Mutual recognition achieved only in a few professions
- Provisions wise, not much progress in areas like domestic regulation, mutual recognition, subsidies and business practices in ASEAN
- ASEAN didn't make offer much beyond GATS commitments, sometimes less
- ASEAN's limited progress in rule making
- By and large ASEAN has retained restrictions in many sectors in all its comprehensive FTAs, but in case of India, ASEAN is more restrictive

Barriers to Trade in Services between India and ASEAN



1. Commercial presence requirement
2. Security/data protection issues
3. Anti-outsourcing sentiments
4. Non-recognition of qualifications
5. Cumbersome licensing procedures
6. Security issues
7. Lack of market knowledge
8. Lack of recognition of qualifications and experiences
9. Restrictive work permit/visa regimes
10. Non-transparent/cumbersome administrative procedures
11. Wage parity conditions
12. Local certification and clearances

Basics of AISTIA



- ASEAN's 3rd agreement covering services, India's 5th
- Has all features of a modern comprehensive services agreement, in line with India's other bilateral services agreements
- Agreement is very similar in structure to the GATS, scope is also similar
- GATS annexes on MNP, Air Transport, Financial and Telecom apply
- Special and differential treatment and flexibility given to the newer ASEAN member states of Cambodia, Lao PDR, Myanmar and Vietnam
- GATS like positive list approach adopted, with compensatory adjustments in case of withdrawal or modification of commitments
- Individual schedules of commitments by ASEAN members
- Three separate commitment schedules by India, one for the Philippines, one for Indonesia, and one for remaining 8 members

India's Commitments in AISTIA

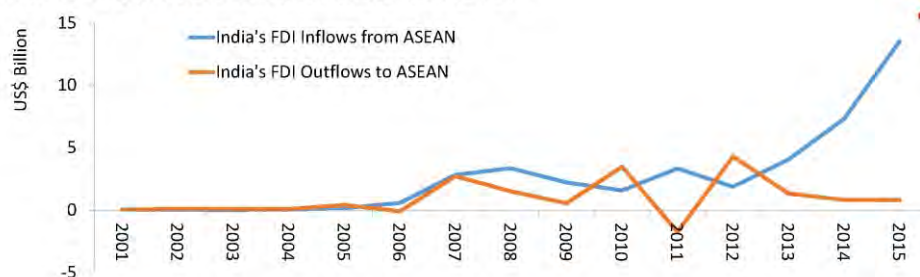


	GATS	India-Singapore	India-ASEAN*	India to Indonesia	India to Philippines
Business Services	✓	✓	✓	✓	✓
Communication Services	✓	✓	✓	✓	✓
Construction & Related Engineering Services	✓	✓	✓	✓	
Distribution Services		✓			
Educational Services					
Environmental Services					
Financial Services	✓	✓	✓	✓	✓
Health Related & Social Services	✓	✓	✓	✓	✓
Tourism & Travel Related Services	✓	✓	✓	✓	✓
Recreational Cultural & Sporting Services		✓			
Transport Services		✓	✓	✓	
Other Services Not Included Elsewhere					

*India to 9 ASEAN countries, except Philippines; For India to Philippines, among these 7 sectors, Construction & Related Engineering Services & Transport Services are also not there.

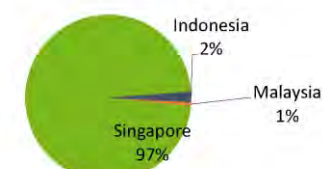
Source: ASEAN-India Centre, RIS

FDI Flows between India and ASEAN



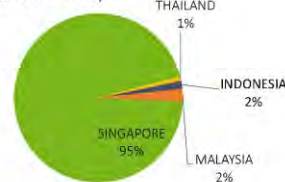
Sources: UNCTAD Bilateral FDI Statistics, DIPP and ASEAN Secretariat

Share of India's FDI inward stock among ASEAN (2010 – 2016)



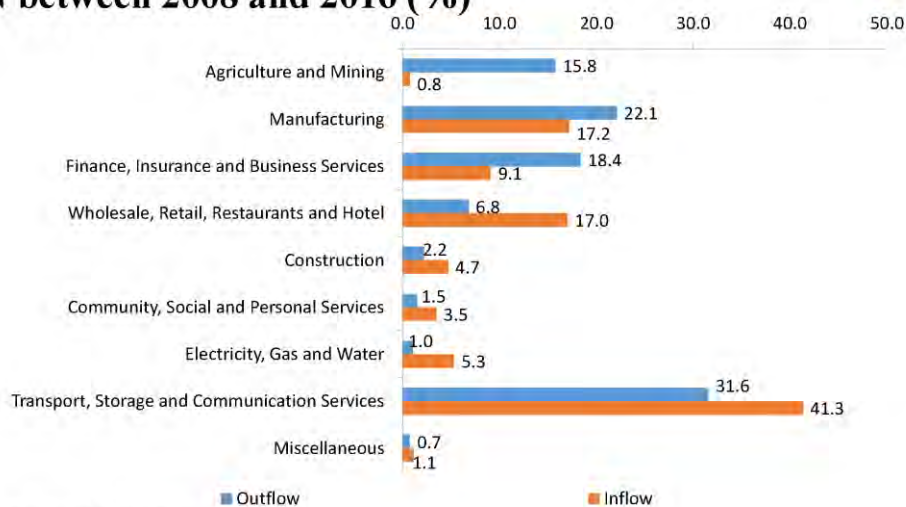
Sources: RBI Database

Share of India's FDI outward stock among ASEAN (2008 – 2016)



Sources: RBI Database

Sector-wise Share of India's FDI Inflows and Outflows in ASEAN between 2008 and 2016 (%)



Source: RBI Database

Bilateral Prospects



Commercial Services Trade by ASEAN Member States and India, 2014

	Exports			Imports		
	Value (US\$ million)	Share in World Total (%)	Rank	Value (US\$ million)	Share in World Total (%)	Rank
ASEAN						
Brunei Darussalam	479	0.01	120	2,019	0.04	87
Cambodia	3,923	0.08	54	1,993	0.04	88
Indonesia	22,920	0.46	22	33,076	0.69	20
Lao PDR ^a	761	0.02	110	523	0.01	126
Malaysia	39,410	0.80	18	44,715	0.93	19
Myanmar ^a	2,204	0.05	74	1,456	0.03	96
Philippines	24,823	0.50	21	19,684	0.41	28
Singapore	140,140	2.84	6	141,323	2.96	6
Thailand	54,942	1.11	13	52,888	1.11	17
Viet Nam	10,833	0.22	36	14,305	0.30	36
India	155,627	3.15	5	146,930	3.07	5

Export and import numbers and rankings with respect to the world economy suggest ample scope for bilateral trade flows in services

Source: Chanda (2018)

RCA indices for services for selected countries and years



	TRAVEL			TRANSPORT			OTHER COMMERCIAL SERVICES		
	2000	2006	2012	2000	2006	2012	2000	2006	2012
INDIA	0.66	0.47	0.50	0.52	0.50	0.60	1.45	1.53	1.39
JAPAN	0.16	0.28	0.40	1.62	1.47	1.37	1.29	1.18	1.14
KOREA	0.69	0.39	0.51	1.91	2.07	1.82	0.73	0.84	0.93
SINGAPORE	0.58	0.44	0.68	1.80	1.56	1.88	0.92	1.09	0.84
THAILAND	1.72	2.09	2.71	1.03	1.00	0.60	0.50	0.46	0.36
ASEAN	1.24	1.21	1.49	1.23	1.24	1.19	0.73	0.81	0.72
CHINA	1.70	1.41	1.04	0.53	1.04	1.01	0.77	0.80	1.00

RCA indices for selected other commercial services

	COMPUTER AND INFORMATION			OTHER BUSINESS SERVICES		
	2000	2006	2012	2000	2006	2012
INDIA	8.08	6.92	5.65	---	1.52	1.25
JAPAN	0.75	0.19	0.16	1.19	1.10	1.01
KOREA	0.01	0.10	0.07	1.07	0.78	0.81
SINGAPORE	0.29	0.30	---	1.35	1.56	0.85
THAILAND	---	0.01	0.01	0.88	0.82	0.60
ASEAN	0.29	0.28	0.44	1.09	1.12	0.89
CHINA	0.39	0.73	1.27	1.18	1.32	1.37

RCA indices confirm inferences drawn regarding areas of complementarity and enhanced relations
Source: Chanda (2018)

RCEP Services Sector Negotiations



- The RCEP negotiations, launched in November 2012, covers trade liberalisation in goods, services, investment, e-commerce, competition, government procurement, standards, intellectual property and customs procedures, economic and technical cooperation, and dispute settlement.
- India has been emphasising on the inevitable linkages between services and goods negotiations in the RCEP agreements.
- RCEP members have finally conceded to India's demand to liberalise their services market and allow MNP.
- Mode 4 or MNP is one of the four ways through which services can be supplied internationally.
- India's interests in construction, tourism, education, IT and e-commerce, financial services, transportation, etc.

Areas Where India Could Gain in Asia-Pacific or Indo-Pacific



- Improved market access commitments in areas like computer and related services, and various professional services, which are not undermined by regulatory barriers in the form of immigration, recognition and standards related restrictions on mobility of its service providers or by data protection related challenges to IT-enabled services exports
- Increased tourism trade with Asia-Pacific / Indo-Pacific countries, along with associated steps to facilitate connectivity
- Increased investment from selected Asia-Pacific / Indo-Pacific countries in subsectors such as construction, urban infrastructure development, financial and logistics services where latter have expertise
- Sub-regional and bilateral initiatives which go beyond commerce to address common interests and leverage bilateral expertise in sectors such as health, education, transport, energy, telecom, IT
 - Prime example is health where common interests in medical tourism, telemedicine can be explored and Indian expertise in these areas can be leveraged not only for trade but for addressing domestic needs

Concluding Remarks



- Growing ASEAN-India services trade will strengthen the regional and multilateral trade relations
- Integration of services not just for better access in each others' markets but for better collective access in global markets
- Focus on areas where there is alignment between ASEAN Economic Community (AEC) Blueprint 2025 targets and Indian initiatives and interests
- Steps for alignment with AEC and other efforts in the region such as RCEP
 - Facilitate bilateral investment in services where clear complementarity in capacities and interests on both sides
 - Explore synergies between manufacturing and services trade (business support, IT, transport) and role of services in regional value chains
 - Enhance transport and telecom connectivity
 - Sectoral and issue based cooperation initiatives (ICT, energy, R&D, health, digital technology, e-commerce, SMEs, GVC participation)
 - Facilitate mobility of professionals, business visitors, intra-corporate transferees between India and ASEAN-easing of visas and regulatory requirements starting with selected occupations/sectors
- Encourage regulatory cooperation and exchange of best practices
- Coordination among professional bodies and eventual mutual recognition of qualifications
- Collective development of regulations, regulatory standards and sharing of knowledge, experience and capacity building



Thank You

prabirde@hotmail.com

Views expressed by the author are his personal. Usual disclaimers apply.

Asia Pacific Forum 2018
Protecting the Global Trading System and the Role for Multilateralism

New Delhi, 22 November 2018

Session 2: Imperatives for Regional Integration: Growing Role of Service Sector

Gary Hawke

1. Services are often embodied in goods. We have to turn away from thinking of “services” as a separate component of trade. Tourism, business services, health services and education services, are all important, but even more so is the efficiency of the entire services sector which contributes to the flow of goods across borders. The issue is the role of services in economic integration, not access at the border for particular activities like financial services, business services, tourism etc.
2. What is important is economic integration, the way that economies interact so as to facilitate the best possible use of all their resources, rather than only management of flows across the border. Most distinctions between “trade”, as activities at the border, and “behind the border” issues are misleading. “Trade” was always used in the economic literature as shorthand for interactions between economies. The earliest discussions of people like Ricardo in the early nineteenth century concerned everything which created a gap between equilibria in adjacent markets. Tariffs were also only a convenient illustration.
3. From very early in the history of GATT, discussion extended beyond tariffs. Subsidies on exports, subsidies on production generally, technical barriers to trade such as standards to ensure interoperability of, for example electricity systems, or for consumer safety, sanitary and phytosanitary standards, and government procurement systems were soon topics for GATT negotiations. As tariffs were reduced, other barriers became more significant. The notion of a need to preserve “policy space” or to protect “sovereignty” by distinguishing “trade negotiations” from other regulatory issues is nonsense. The topic has always been economic integration, not border barriers to trade.
4. Services cross borders in all of Modes 1 – IV of GATS. But the differences matter little to business. And they do not identify the principal role of services, their

contribution to the construction of goods which are the easily identified vehicles for interaction among economies.

5. The context for discussing services in economic integration is less likely to be analogous to those used for goods – tariffs, nontariff barriers like standards, SPS, etc than it is to be part of the process of regulatory co-operation. How do we reconcile “policy space” for decisions about issues like consumer safety with the desirability of achieving the greatest possible efficiency in the use of all the resources of economies engaged in economic integration?
6. The way forward is much more likely to be direct contact among the regulatory authorities of different economies than it is to be negotiation among trade officials. The notion that regulatory requirements should be such as to achieve their objectives with as little restriction of cross-border activity as possible is a starting point, but getting regulatory authorities to think in terms of regional welfare as much as national welfare – and history – avoids fruitless debate between “trade” versus “sovereignty”.

Asia-Pacific Forum 2018

“Protecting the Global Trading System and the Role for Multilateralism”

Session 2: Imperatives for Regional Integration: Growing Role of Services Sector

22 November, 2018
New Delhi

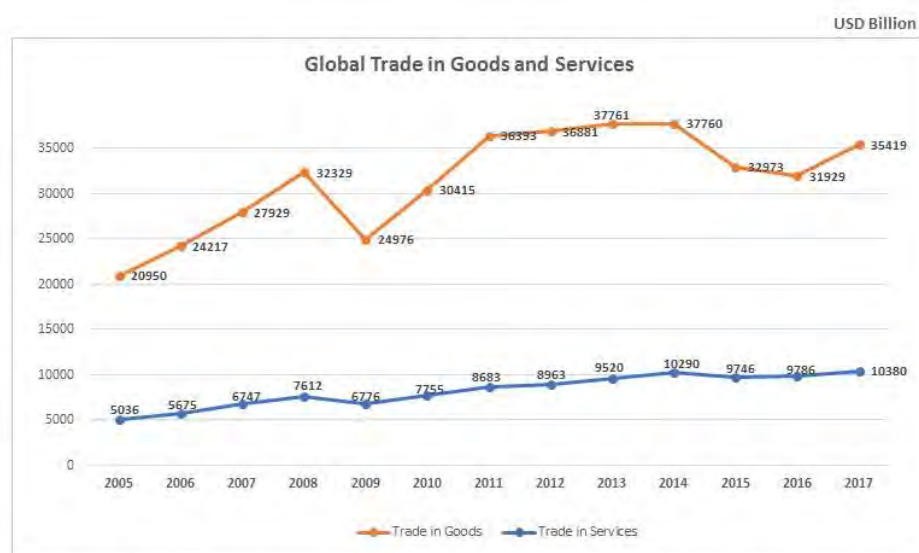


Anita Prakash

Director General, Policy Design Department
Economic Research Institute for ASEAN and East Asia (ERIA)
Jakarta, Indonesia

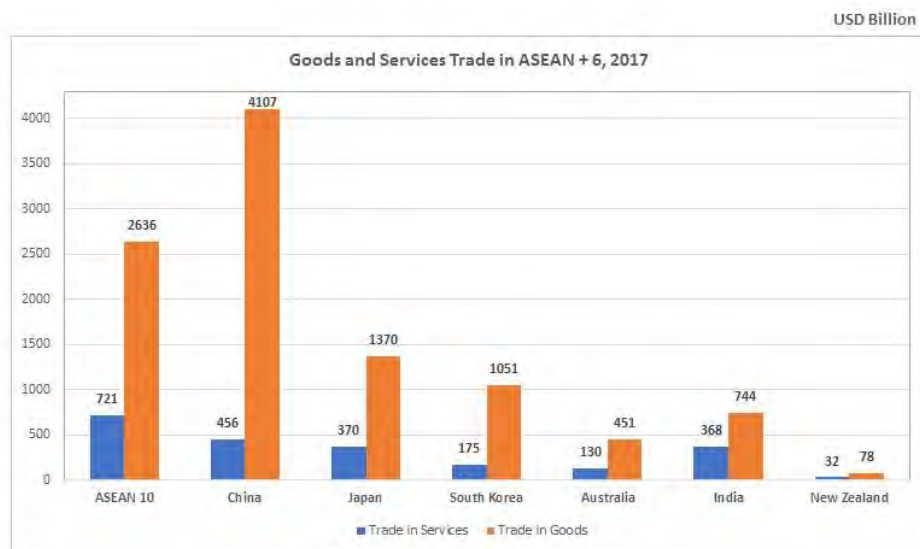
Visiting Research Fellow
Global Governance Center
Graduate Institute of International and Development Studies
Geneva, Switzerland

Global Trade in Goods and Services



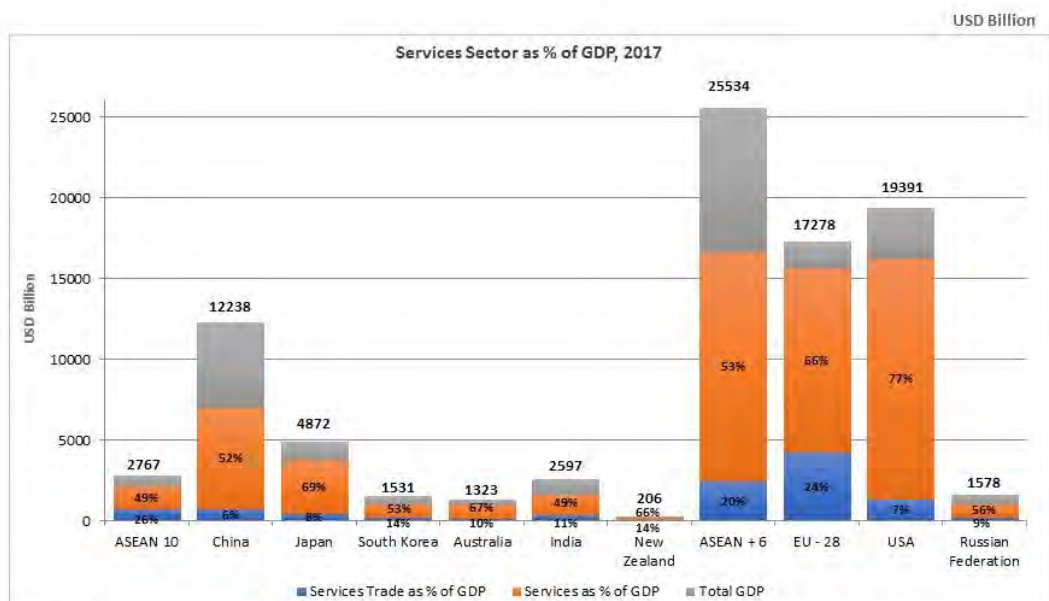
Source: International Trade Center (2018)

Goods and Services Trade in ASEAN + 6



Source: International Trade Center (2018)

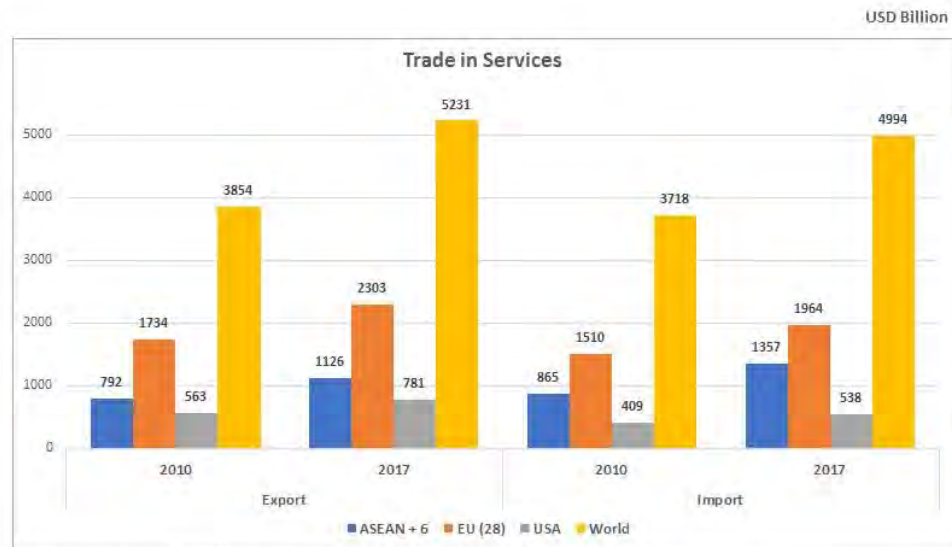
Services Sector as % of GDP



Source: World Bank (2018)

A Comparative View: Trade in Services

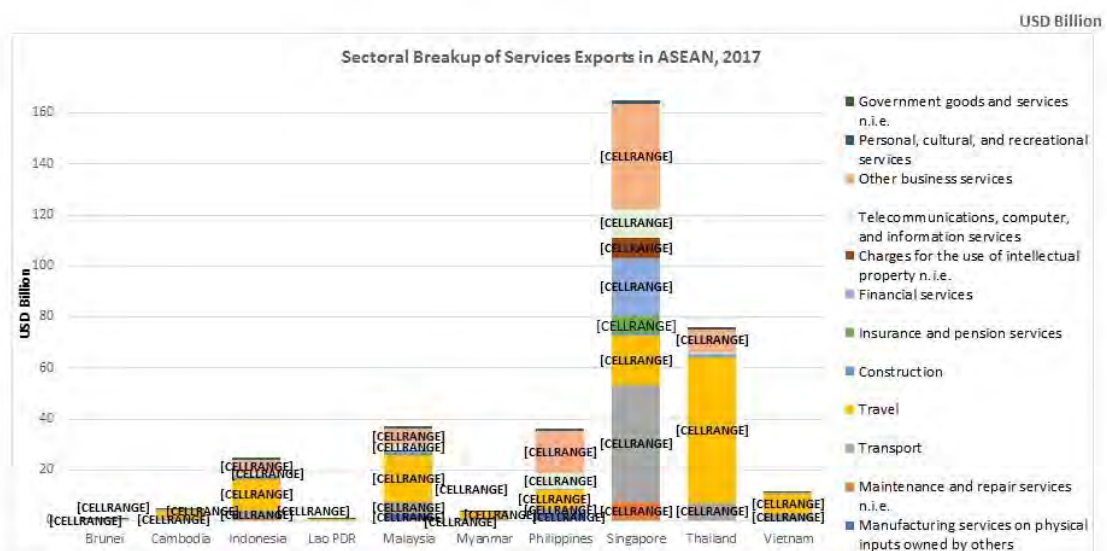
- Exports are important; imports are also important for emerging economies.



Source: International Trade Center (2018)



Sectoral Breakup of Services Exports in ASEAN

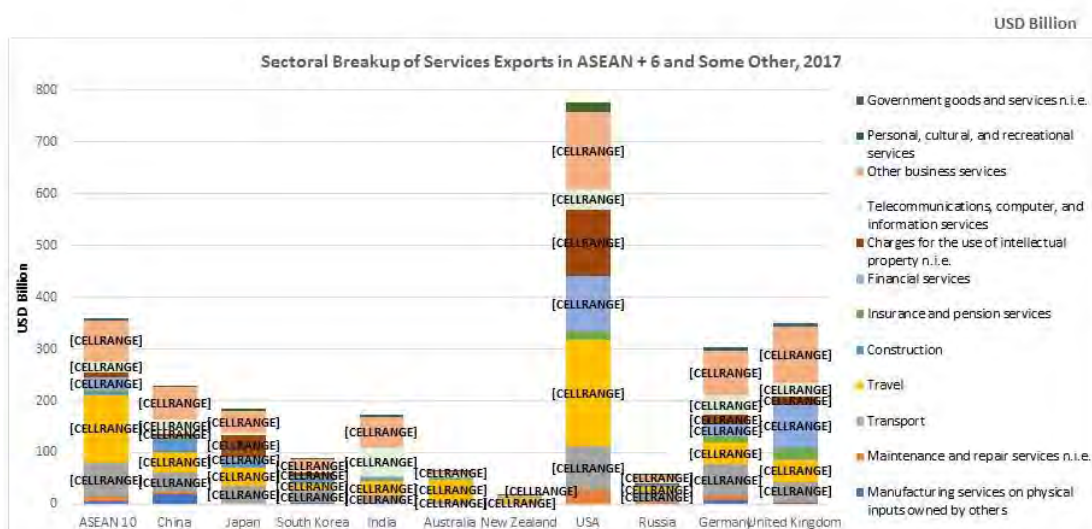


Source: International Trade Center (2018)

Note: International Trade Center (ITC) defines "Other Business Services" as: (1) Research and development (R&D); (2) Professional and management consulting services; and (3) Technical, trade-related, and other business services.



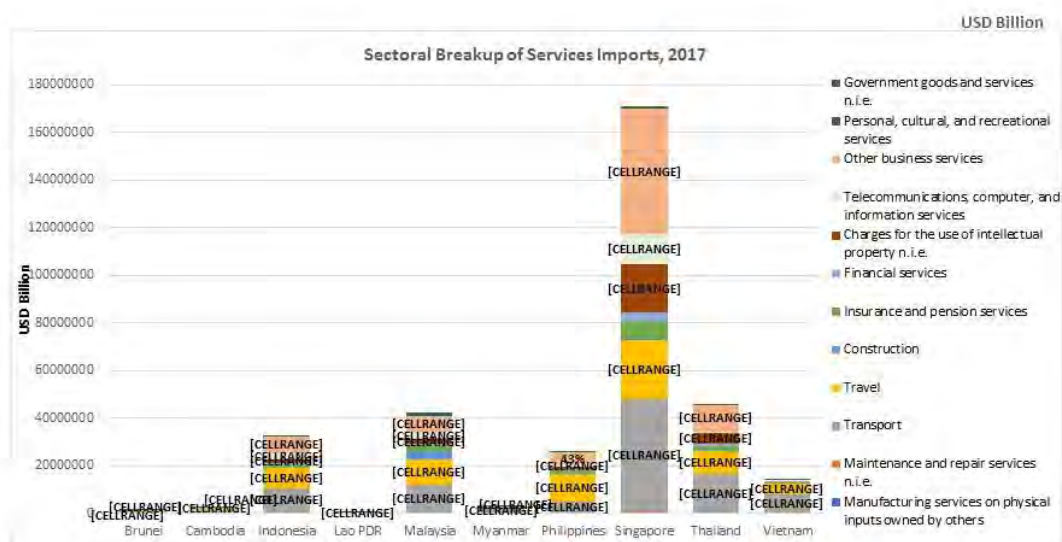
Sectoral Breakup of Services Exports in ASEAN + 6 and Some Other Economies



Note: International Trade Center (ITC) defines "Other Business Services" as: (1) Research and development (R&D); (2) Professional and management consulting services; and (3) Technical, trade-related, and other business services.



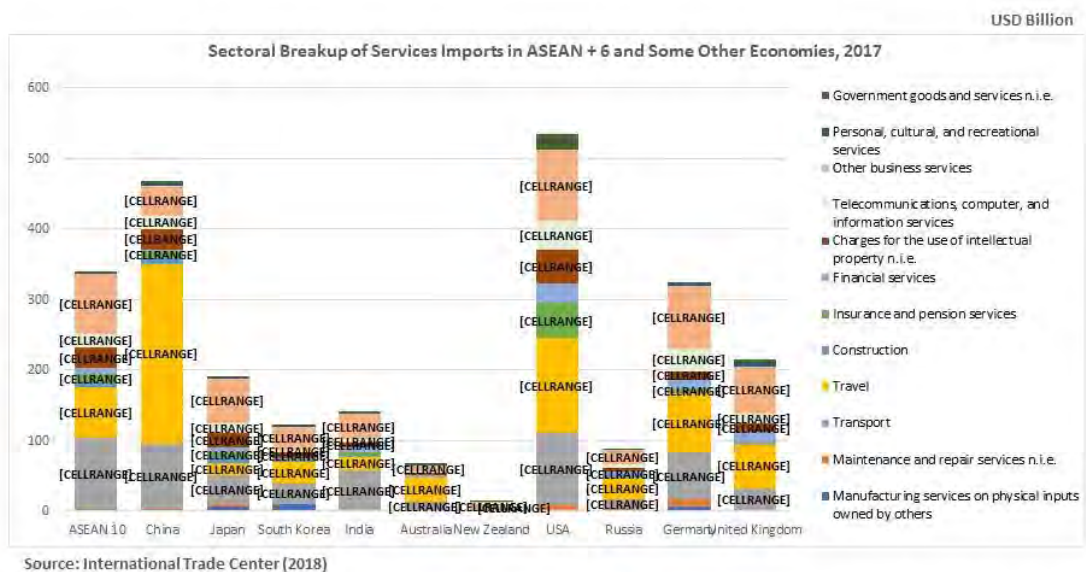
Sectoral Breakup of Services Imports in ASEAN



Note: International Trade Center (ITC) defines "Other Business Services" as: (1) Research and development (R&D); (2) Professional and management consulting services; and (3) Technical, trade-related, and other business services.



Sectoral Breakup of Services Imports in ASEAN + 6 and Some Other Economies



Notes: International Trade Center (ITC) defines "Other Business Services" as: (1) Research and development (R&D); (2) Professional and management consulting services; and (3) Technical, trade-related, and other business services.



Education Expenditure as % of GDP



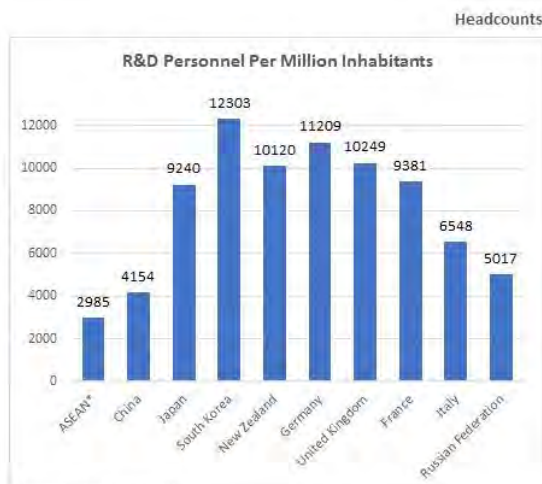
Source: UNESCO 2018

Note:

- *Data for ASEAN does not include the Philippines.
- No Data available for China.
- Data from 2013 taken for India; 2014 for USA; 2015 for South Korea, Australia, New Zealand, Germany, France, Italy, Finland, Sweden, and Russian Federation; 2016 for Japan and the United Kingdom; various years (2013 to 2016) taken for ASEAN's average.



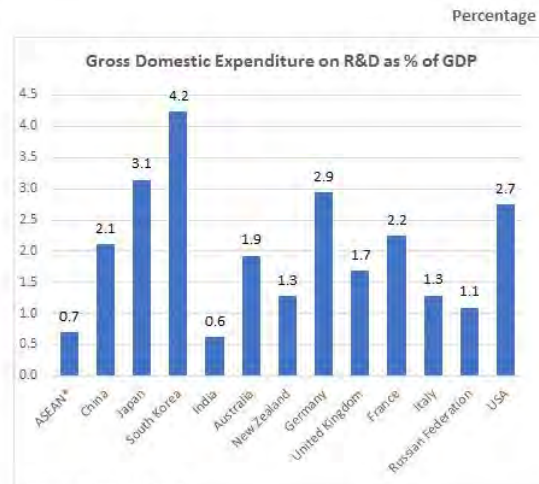
Are We Investing Enough?



Source: UNESCO 2018

Note:

- *Data for ASEAN does not include Brunei, Indonesia, and Lao PDR.
- No data available for India and Australia.
- Data from 2015 taken for Germany, the United Kingdom, France, and Italy; 2016 for China, Japan, South Korea, New Zealand and Russian Federation. Various years (2013 to 2015) taken for ASEAN's average.



Source: UNESCO 2018

Note:

- *Data for ASEAN does not include Brunei, Lao PDR, and Myanmar.
- All data taken from 2016, except for India, Australia, and New Zealand are taken from 2015. Various years (2013 to 2016) taken for ASEAN's average.

11

In RCEP - Services Ahead of Goods?

- Penultimate services offers, except few format/time differences
- Philippines, Thailand and India
- Transition to negative list approach later should not dilute earlier offers using positive list approach

- * (Brunei Darussalam—offer as single negative list; Singapore—final offers as a single negative list covering both services and investment).
- ** Philippines will submit a single list for services and investment in the negative list format in 2019; Thailand and India will also present their a negative list approach after the finalisation of market access negotiations based on the positive list approach



13

Thank you.



Digital Economy: New Opportunities and Challenges

Shujiro URATA
Waseda University

- Digitalization: economic activities performed by digital or digitally enabled modes
- Digitalization of economic activities brings about benefits such as improving efficiency and achieving diversity but it also gives rise to challenges such as replacing traditional modes of business.
- Some examples:
 - Digital versions of products and services vs physically embodied versions
 - Digital distribution and facilitation business vs traditional models
 - New modes of trade: e.g. C2C

- Datafication: virtually every aspect of economic and social interaction is recorded and stored as data.
- Datafication, which is closely related to digitalization, also brings about benefits as well as challenges.
- Benefits: Datafication enables producers, consumers, governments, and others to facilitate making decisions, or achieving objectives. → need for free flow of data (case against digital protectionism in the form of data localization, discrimination against foreign data service providers, etc.)
- It is important to realize that digitalization/datafication enables small and medium-sized enterprises to compete against large enterprises if competition is performed on a level playing field.

- Challenges: Economies of scale and scope, network externalities → superstar firms. This feature of digitalization/datafication gives rise to government's strategic industrial policy → digital wars
- Protection of privacy
- Need for International Rule on the Digital Economy, in order to maximize benefits and minimize costs
- CPTPP: Chapter on E-commerce
- no discrimination, consumer and personal protection, free cross-border transfer of information, no localization policy
- WTO : Trade ministers from Japan, US, and EU agreed on the need to establish business friendly environment for the promotion of digital economy and to ensure data security (September 2018). They also welcomed the e-commerce discussions at the WTO.

⑪Dr. Zhang Jianping

Points

E-commerce on domestic and international market is more and more popular in China and a case in Guangdong province provided.

Both China and partners need to consider the rule and regulation. WTO reform needs to pay more attention on Ecommerce.

E-WTP could be a possible approach

Fintech. Ali-Pay and We chat Pay are warmly welcomed by consumers in China and a case of ticket buying for the Forbidden City is provided. New rules and regulation also needed.

Ecommerce and Fintech are relying on infrastructure including electricity, smart phone and internet development.

Qualified human resources also will be needed. Training and education.

China is suffering from the huge deficit on trade in services and imbalance on manufacture and service sector.

China is supporting globalization and regional economic cooperation. By 12 FTZ pilot platforms trade in service become more and more opened and China hopes to boom service sectors development by market competition.

China supports WTO regime and RCEP, wish to join TISA negotiation in the near future and are promoting more .RTA negotiations.

China and India need to cooperate and formulate more comparative economic relationship and benefit from that progress.



CENTRE FOR
STRATEGIC AND
INTERNATIONAL
STUDIES

Sustainable Development: Importance and Issues in Asia Pacific

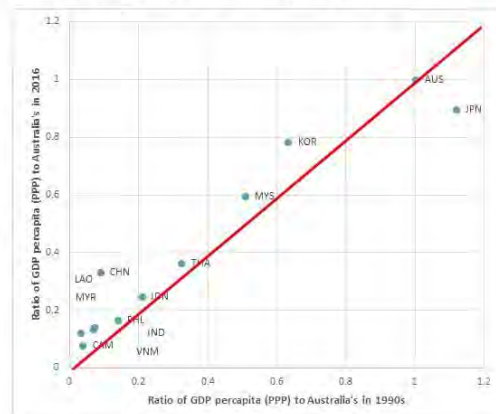
Yose Rizal Damuri

Centre for Strategic and International Studies

The Region has been Growing Well

- East Asia and Pacific has emerged as the fastest growing region
 - Economies growing at the annual rate of more than 5% is not uncommon
 - GDP percapita (PPP) has been more than doubled in the last two decades
- It has led to greater convergence among economies in the region
 - Although some countries are still left behind

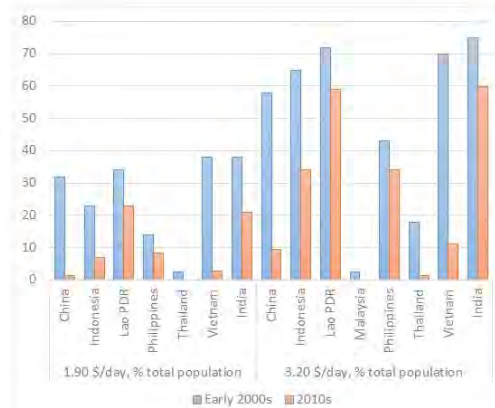
The Economies are Converging



Source: Calculated from WB World Development Indicators

Increased the Livelihood of Population

- It has reduced the number of people living under poverty line
 - Also in terms of proportion
- In China alone, more than 400 million have been out of poverty in the last two decades
 - Also in other high populated countries, e.g. Indonesia and India
- But the number of people living in poverty is still big
 - Also those living in vulnerable situation
 - And the reduction rate is declining

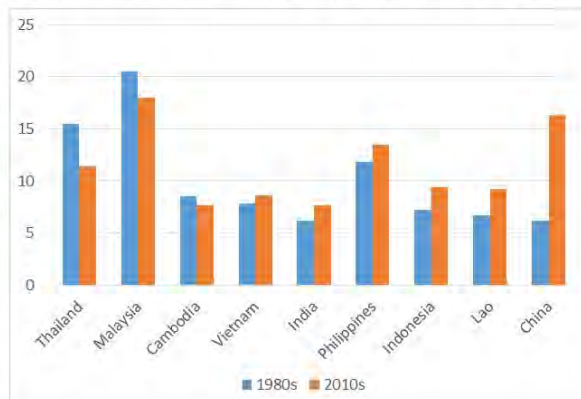


Source: WB World Development Indicators

But Inequality is Increasing

- The region has witnessed a significant increase in inequality
 - Countries growing faster tend to increase their inequalities
- Inequalities can negatively impact economic growth
 - Also making poverty alleviation harder
 - May also lead to activities that harm environment

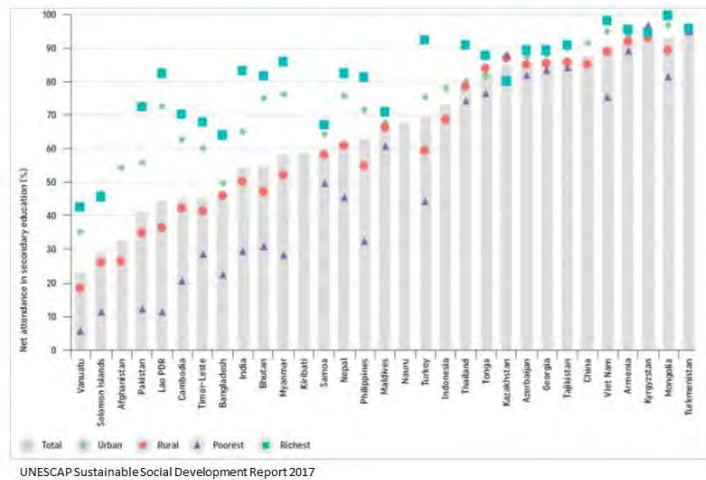
Ratio of Consumption/Income for 10% richest and 10% poorest



Calculated from WB World Development Indicators

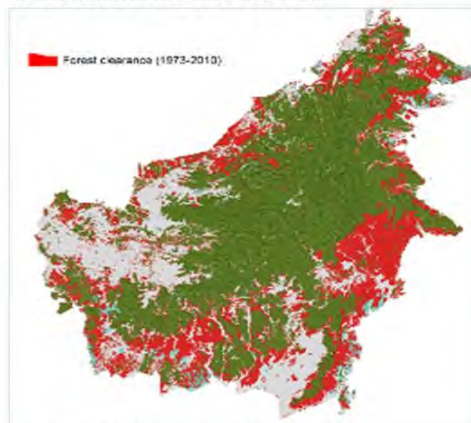
Mostly Because of Inequality in Opportunities

- Unequal access to education
 - Children from low income families will be more likely to drop-out from school
 - Not to mention about quality of education
- Low access to health care and to basic services
 - Not enough access to sanitation and clean water



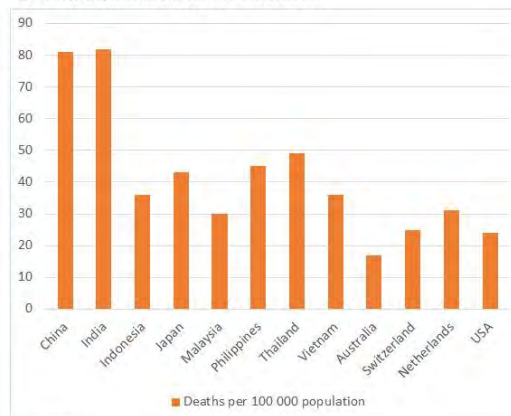
Environmental Impact is Costly to the Society

Deforestation: The Case of Borneo



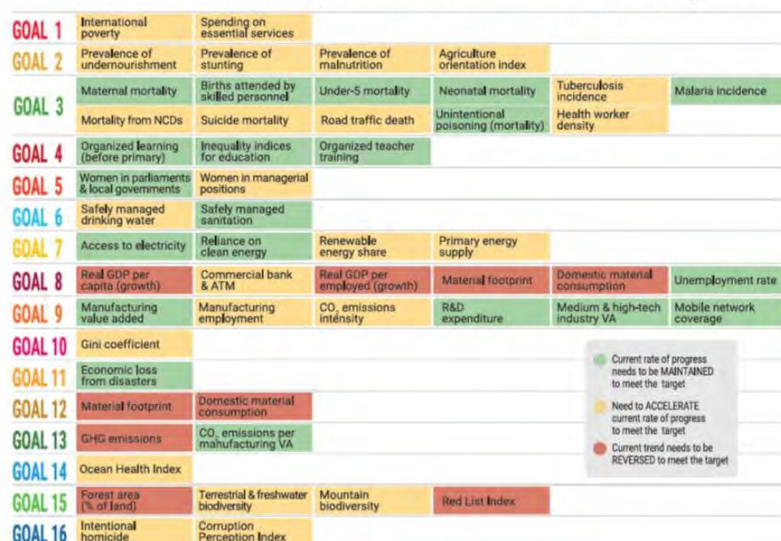
Gaveau DLA, Sloan S, Molitdena E, Yaen H, Sheil D, et al. (2014)

Deaths Attributed to Air Pollution



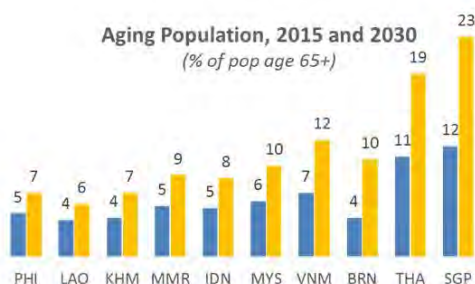
WHO Database

Asia is still Falling Behind on Majority of the Goals

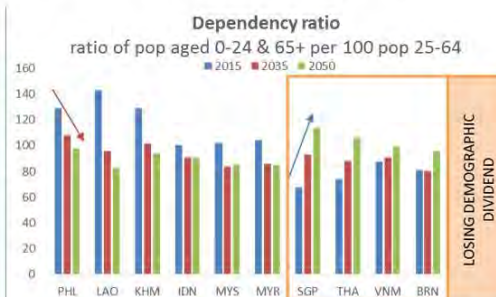


UNESCAP: Asia and The Pacific SDG Report 2017

Challenges are Increasing: Demographic Profile



The elderly population is rising as the demographic changes overtime.



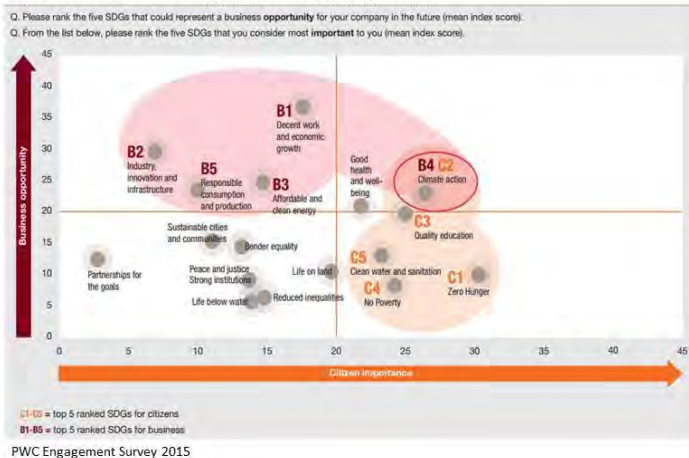
Singapore, Thailand, Vietnam, and Brunei are the first to lose demographic dividend as their dependency ratio is rising.

Source: UN DESA, Population Division (2017). World Population Prospects: The 2017 Revision

Requires Collaboration of all stakeholders

- To achieve SDGs require efforts from all stakeholders to empower
 - Especially from private sector
- But the awareness is still low among Asia's business
 - Also among consumers and society
 - Many investment remain to be clashing with SDGs
- And different stakeholders have different interests

But not easy to find common ground



What Regional Initiatives can do...

- Incorporating SDGs explicitly and systematically in high-level political actions such as in ASEAN and APEC
 - That helps to raise awareness to the importance of the goals
 - Prioritizing some issues related to SDGs that are more relevant to the region
- Promoting infrastructure development and private investment in the region with SDGs as major principles and following sustainable practices
 - Promoting green financing and investment
- Increasing availability of relevant data and capacity to collect and analyze related information
 - Regional initiatives should also monitor and evaluate the progress and problems, not only the UN
- These should be done not only by the government, but also all stakeholders
 - Including academics and scholars at the regional level

A PARADIGM OF ECONOMIC INTEGRATION FOR ATTAINING SDGs

Vo Tri Thanh (CIEM)

**Asia – Pacific Forum 2018
New Delhi, 22 November 2018**

Impacts of integration: Do we really understand?



□ Common understanding

- Trade liberalization ➔ more efficient resource allocation + Bigger pie of welfare ➔ Not a "zero-sum-game" but "win – win game". Globalizers seem to be winners (in most studies!)
- Can be good for poverty reduction thanks to better exploitation of comparative advantages

❑ ***The issue is more complex and complicated***

- Meaning of "winners & losers": Between countries and within a country? Absolute gains and relative gains (the "gaps")?
- Political issue of the loss of a social group?
- Interaction between inter. integration and country's domestic reforms?
 - Unless integration does go with domestic reforms, most benefits would be on the side of trading partners (e.g. study on VN's WTO accession by Roland-Holst *et al* 2002)
 - Welfare impacts could be positive/negative depending on several channels: relative prices; flexibility of production factor markets; budget stance (Winters 2003)
- Short term vs. long term impacts: Risk for falling into "low cost labor trap" in long run? Capital flows and possible financial crisis? Industry 4.0 & impacts (on services, production networks & GVCs,...)

❑ ***Implications***

- More theoretical studies + Case - studies (cross-section comparison; individual economy; at micro level)
- Learning from various experiences of de-facto regional integration

❑ ***AEC = Way of building People – Centred Community***

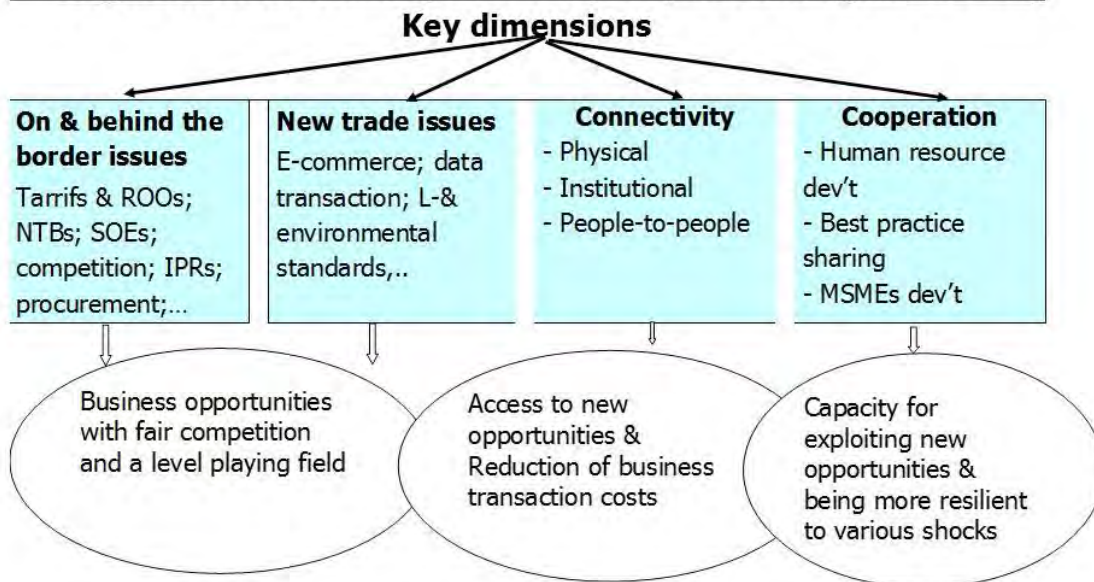
Goals: Inclusive, sustainable growth and narrowing development gap

<i>Vision of ASEAN integration</i>	
By 2015	By 2025
1. Common prod base & single market	1. A highly integrated & cohesive economy
2. Competitive regional economy	2. A competitive, innovative & dynamic ASEAN
3. Equitable dev't	3. Enhanced connectivity & sectoral cooperation
4. Integration into the global economy	4. A resilient, inclusive & people-oriented, people-centred ASEAN
	5. A global ASEAN

- ❑ **APEC:** Action Agenda 2017 on promoting economic, financial and social inclusion (Targets, Areas for progress & monitoring; APEC-wide Actions: Collaboration, Accountability and Implementation) + APEC Vision Beyond 2020

A Paradigm for a smarter regional integration?

Objectives: People-centered + **Key dimensions** + Appropriate **regional institutions** (DSMs & capacity in handling dev't issues)



Thank you!



Will a Looming Financial Crisis Derail the Progress of SDGs?

Josef T. Yap

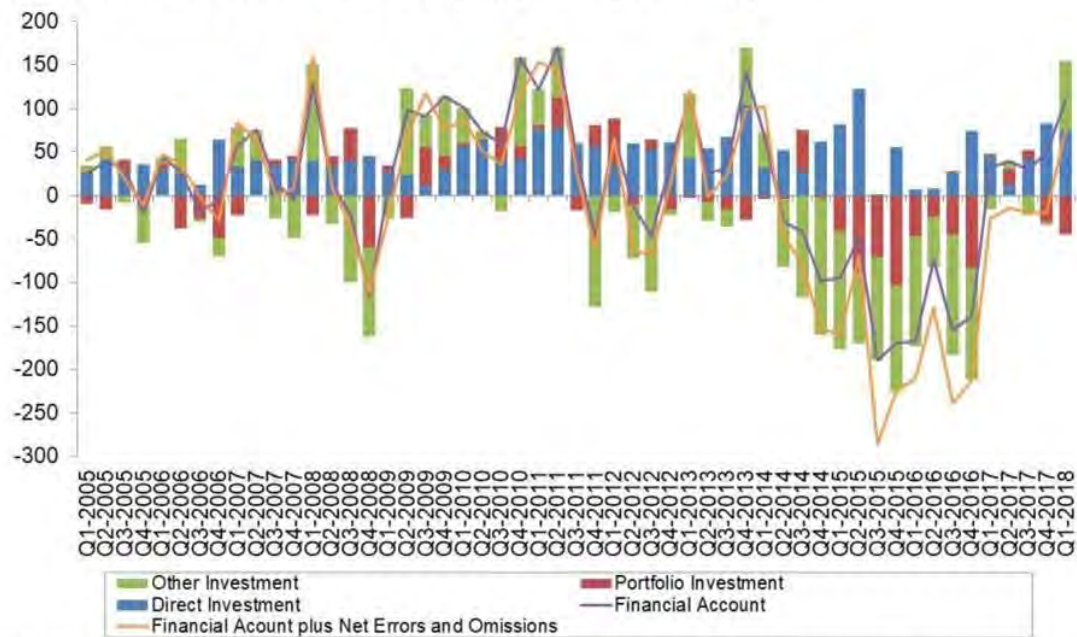
22 November 2018

Sources of Global Vulnerability

- Normalization of Monetary Policy in the US and EU
- Escalating trade conflicts
- Geopolitical tensions (e.g. Korea peninsula, Middle East)
- Localized problems that could spill over (i.e. contagion): Iran, Turkey, Argentina, Indonesia, India (?), China (?)

Evidence of Volatility in Capital Flows

Net Financial Flows—Developing Asia (\$ billion)

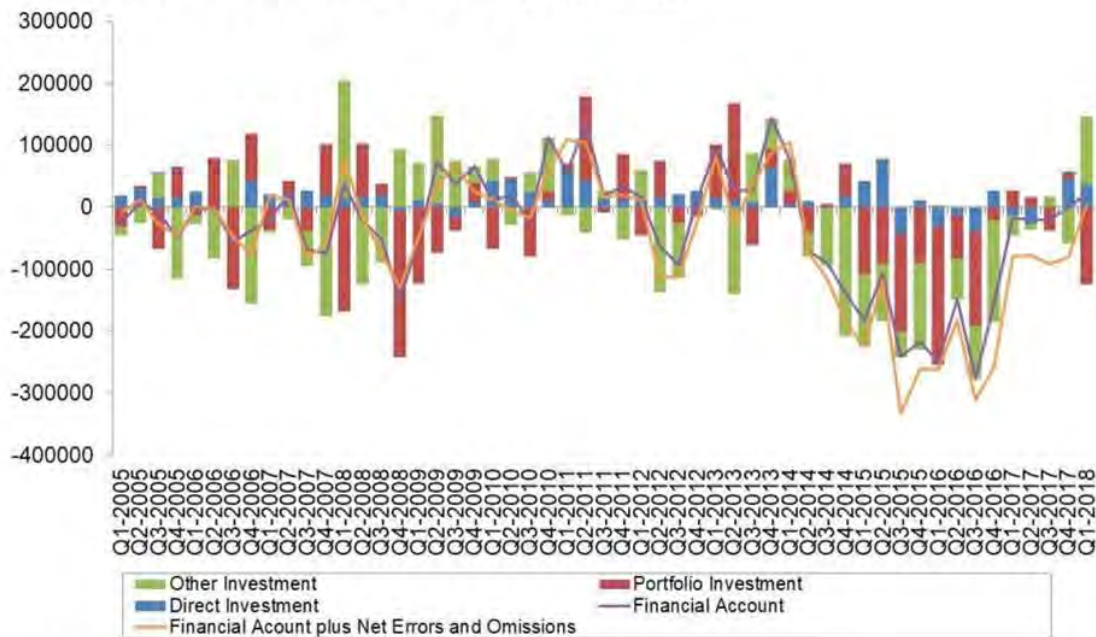


Note: Break in comparability of data for IND (2009) BRU (2010) and MAL (2010). For Malaysia, this effectively discounted "other investments" in its assets and liabilities breakdown.
 1. For consistency of charts, net of "other investment" corresponds to resident inflow for Malaysia starting 2010.
 2. In the case of Lao PDR, net of direct, portfolio and other investments corresponds to "non-resident inflows" direct, portfolio and other investments starting 2014.
 3. ASEAN+3 excludes CAM from Q42017 and BRU, LAO, and MYA for Q12018.

Source: Balance of Payments Statistics, International Monetary Fund

Evidence of Volatility in Capital Flows

Net Financial Flows—ASEAN+3 (\$ million)



Note: Break in comparability of data for BRU (2010) and MAL (2010). For Malaysia, this effectively discounted "other investments" in its assets and liabilities breakdown.
 1. For consistency of charts, net of "other investment" corresponds to resident inflow for Malaysia starting 2010.
 2. In the case of Lao PDR, net of direct, portfolio and other investments corresponds to "non-resident inflows" direct, portfolio and other investments starting 2014.
 3. ASEAN+3 excludes CAM from Q42017 and BRU, LAO, and MYA for Q12018.

Source: Balance of Payments Statistics, International Monetary Fund

A Sketch of the Components of the Global Financial Safety Net

Scope	Element	Conditionality	Availability and key factors determining access
National	Foreign exchange reserves	No	Past reserve accumulation, exchange rate regime
Bilateral	Central bank swap lines	Yes	Economic and political links with the reserve currency-issuing country
Regional	RFA financing	Yes for most RFAs	RFA forward commitment capacity; sometimes limited to a multiple of paid-in capital
	ADB's Crisis Response and Lending Facilities	Yes	OCR-eligible and graduated DMCs, capped at \$500 million per exogenous shock or crisis episode
Global	IMF financing	Yes for most instruments	IMF forward commitment capacity, IMF quota, political factors

Source: ADB power point, August 14, 2018

Role of GFSN

- Crisis Prevention
- Crisis Management

- Q: What is the appropriate role of the RFA in each aspect?
- Q: What can regional cooperation accomplish?

The Global Financial Safety Net: Issues and Challenges

- Critics argue the current safety net is too small, too fragmented and too unresponsive.
- The IMF reforms targeted some of the fundamental issues behind these weaknesses such as rigidity of its terms, limited representation of emerging market economies in the IMF board, and the shortage of IMF funding.
- **The regional and bilateral arrangements play an important and complementary role in the global financial safety net.**
- **But how to build a strong and resilient multilayered safety net?**



7

Ways to Strengthen Regional Financing Arrangements in ASEAN+3

- ✓ Enhancing operability of Chiang Mai Multilateralization (CMIM)
- ✓ Introducing paid-in capital and exploring ways to leverage this, e.g. through bond issuance
- ✓ Enhancing CMIM efficacy by increasing the IMF de-linked portion (what are the conditions for this?)
- ✓ Discussing CMIM's role and mandate—in particular, once there is paid-in capital, how can CMIM better utilize its resources? (Can it be used to develop capital markets and recapitalize systemically important banks in the region?)
- ✓ Strengthening ASEAN+3 Macroeconomic Research Office's (AMRO) role as an independent regional macroeconomic surveillance unit



8

An important objective: individual economies should reduce reliance on foreign exchange reserves as self-insurance.

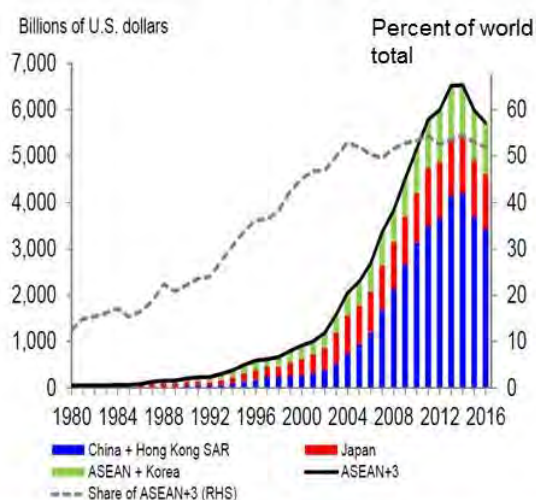
This allows resources to be freed up and used for development objectives, particularly the SDGs.



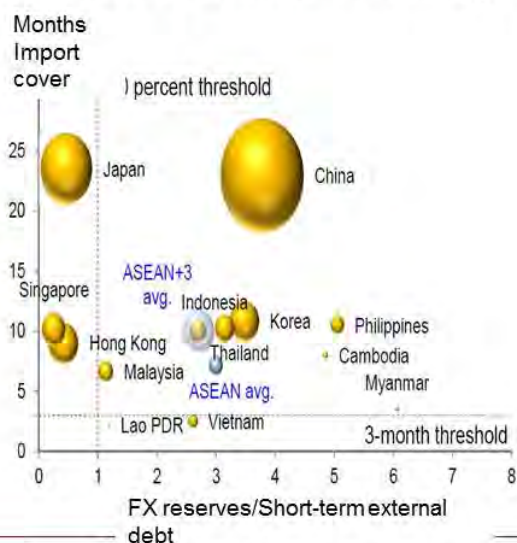
Building up Buffers against Shocks

The region has tried to self-insure against future crises by ~~building up FX reserves.~~

ASEAN+3 FX Reserves



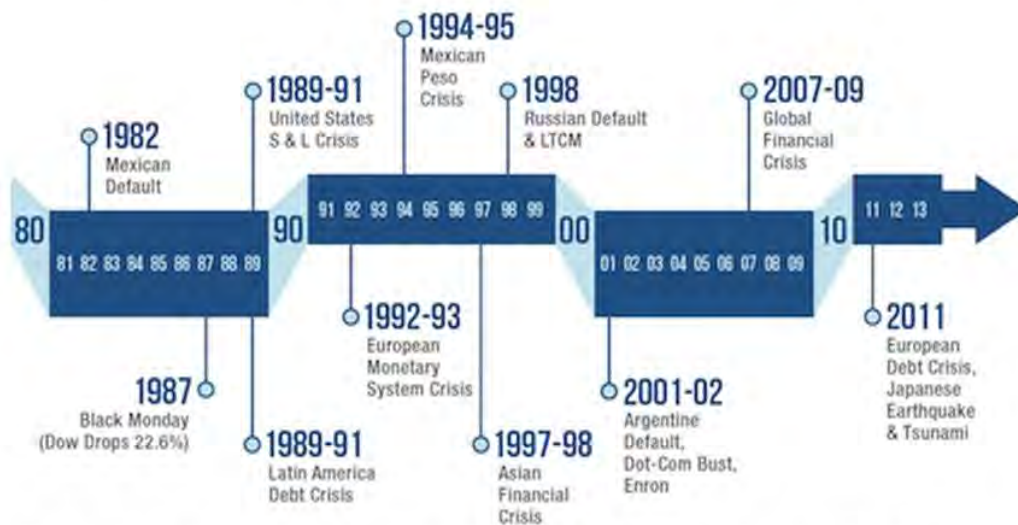
ASEAN+3 FX Reserves Coverage



Source: IMF, AMRO staff calculations

Source: IMF, The World Bank, AMRO staff calculations

28 months till the end of the decade...



At least one major financial crisis in a decade, at least since the 1970s. If the European Debt Crisis and 2013 Taper Tantrum do not count as a major crisis.....

감사합니다

Maraming Salamat!!!

Terima Kasih

ขอบคุณครับ

ありがとう

धन्यवाद

Cảm ơn rất nhiều

ຂອບໃຈຫລາຍໆ

謝謝你。

សូមអរគុណ

ကျေးဇူးတင်ပါတယ်။

THANK YOU !!!

Structural Change & Inequality: Evidence from Asia

By Rudra Prosad Roy & Saikat Sinha Roy



Author
Rudra Prosad Roy



Author
Saikat Sinha Roy

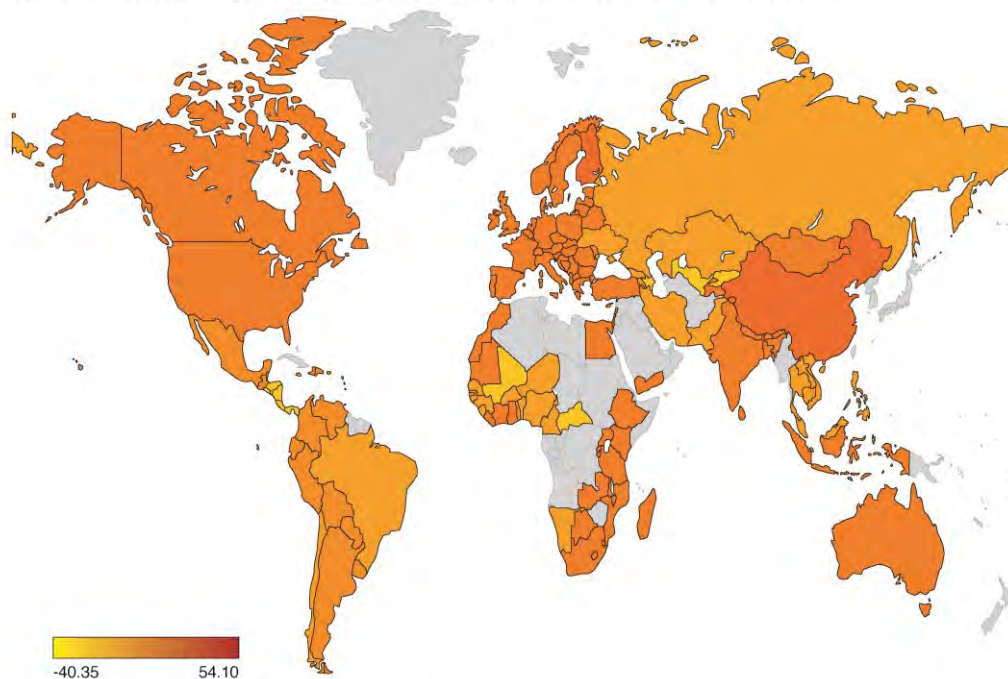
Heterogeneity in Within-country Inequality Across Countries: a Discussion

Through adopting Sustainable Development Goals (SDGs) countries have targeted to reduce income inequality within and across countries. Even though relative global inequality is found to have remained stable, or at best declined (Miguel Nino-Zarazua, Laurence Roope and Finn Tarp, "Global Inequality: Relatively Lower, Absolutely Higher", *Review of Income and Wealth*, Aug. 15, 2016), there is wide heterogeneity in within-country inequality across

countries and regions (Stephan Klasen, Nathalie Scholl, Rahul Lahoti, Sophie Ochmann and Sebastian Vollmer, "Inequality — Worldwide Trends and Current Debates", Georg-August-Universität Göttingen Discussion Paper No. 209, 2016). Reduction of income inequality is key to long-term growth and sustenance not only by encouraging investment in human capital, but also ensuring reduction in the concentration of economic and political power in the hands of a few, who then prevent redistribution of income and wealth. (A detailed discussion of the effects of income inequality on economic growth can be found in Rudra Prosad Roy and Saikat

CHART 1

Change in average income inequality between 1990s & 2000s



Source: Authors' own calculation on the basis of data from World Development Indicators

Sinha Roy, "Does Inequality Dampen Economic Growth? A Cross-Country Analysis", in Chandan Roy (ed.), *International Trade and Inclusive Development: Emerging Issues and Enlarging Debates*, New Delhi: New Academic Publishers, 2017.)

Within-country income inequality is often believed to be associated with the structural transformation of that economy. Classically, structural change in an economy takes place over time with a rise in the relative share of the manufacturing sector followed by a rise in the relative share of the services sector. The idea of a nexus between structural transformation and income inequality follows from seminal papers by Simon Kuznets ("Economic Growth and Income Inequality", *American Economic Review* 45, 1955, and "Quantitative Aspects of the Economic Growth of Nations: VIII. Distribution of Income by Size", *Economic Development and Cultural Change* 12, 1963). It is often argued that structural transformation in the long run creates more job opportunities and leads to a more equal society. Kuznets, on the other hand, hypothesized an inverted U-shaped relationship between economic growth and income inequality.

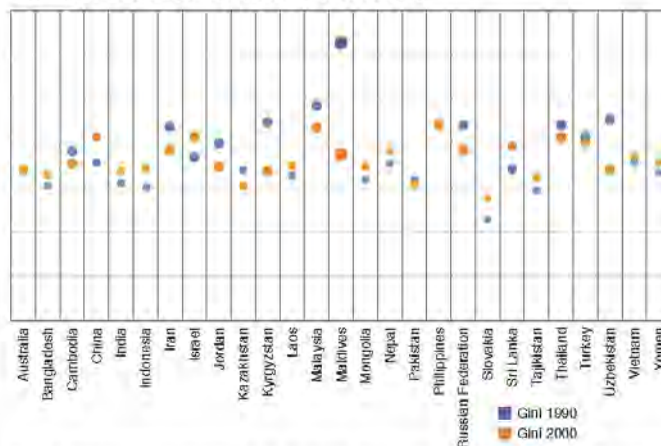
In this context, it is important to observe whether structural transformation reduces income inequality. Prior to discussing the linkage between structural transformation and income inequality, it is important to understand the pattern of change of income inequality over time across countries.

Structural Change & Income Inequality: Some Cross-Country Evidence

While most developed countries experienced structural transformation in the 19th and early 20th centuries, some other countries, including Japan and several developing nations, experienced structural transformation in the mid and late 20th century. For instance, Japan experienced "an economic transformation ... in the high-growth years from 1953 to 1973. In the space of two decades a largely agricultural nation became the world's largest exporter of steel and automobiles..." (Paul Krugman, *The Return of Depression Economics and the Crisis of 2008*, London: Penguin, 2008; p.57). Economies that were primarily dependent on agriculture and other primary activities have shifted

CHART 2

Change in average income inequality between 1990s & 2000s in Asia-Pacific countries



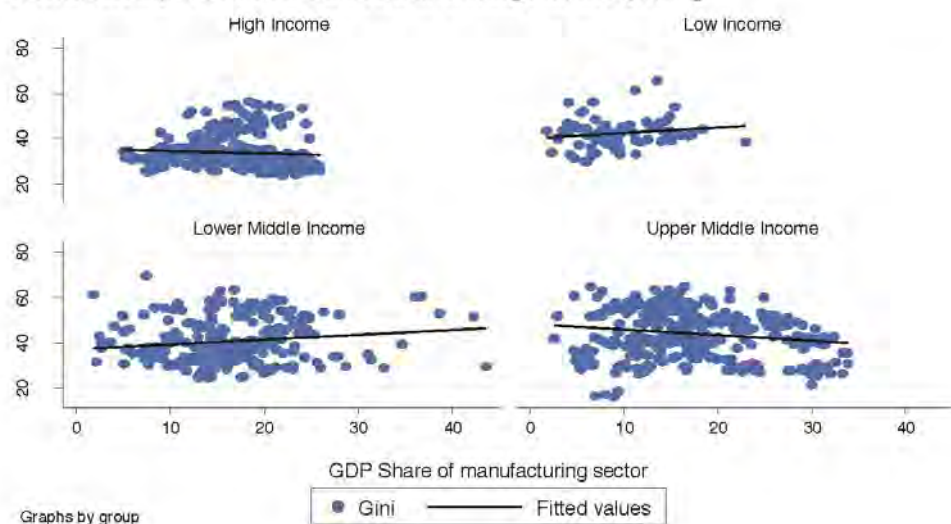
Note: The vertical axis measures log Gini for the two decades. However, the axis is not mapped to scale; the size of the bubble indicates the extent of income inequality for each country during each period.
Source: Authors' own calculation on the basis of data from World Development Indicators

their resources towards more skill- and technology-based activities including manufacturing and services. In the more recent period, most countries including emerging market economies have transformed towards more services production. During the same time economies have also experienced changes in income inequality.

Over the last two and a half decades, income inequality has increased in many countries. Income inequality increased in Africa, followed by Latin American and Asian countries. Changes in average inequality between the 1990s and 2000s across countries can be seen in *Chart 1*. Large changes in inequality are observed in Asian Emerging Market Economies (EMEs). *Chart 2* shows changes in average income inequality in Asia and Pacific countries between the 1990s and 2000s. On account of lack of comparable data, the data on Japan cannot be presented here. It can be seen that in some Asian countries average inequality, measured in terms of average Gini coefficient, has increased between the 1990s and 2000s; and in some other countries it has fallen.

For instance, between the 1990s and 2000s, when China witnessed a quantum increase in inequality, India and Indonesia experienced only a moderate increase. While China showed almost a 15% increase in inequality during the last two decades, the Gini coefficient for India increased from 30.8 to 33.6. The increase/decline in income inequality is irrespective of the size of the economy. Small countries like Jordan, Kazakhstan, Malaysia,

CHART 3

Relationship between structural change & inequality

Source: Authors' own calculation on the basis of data from World Development Indicators

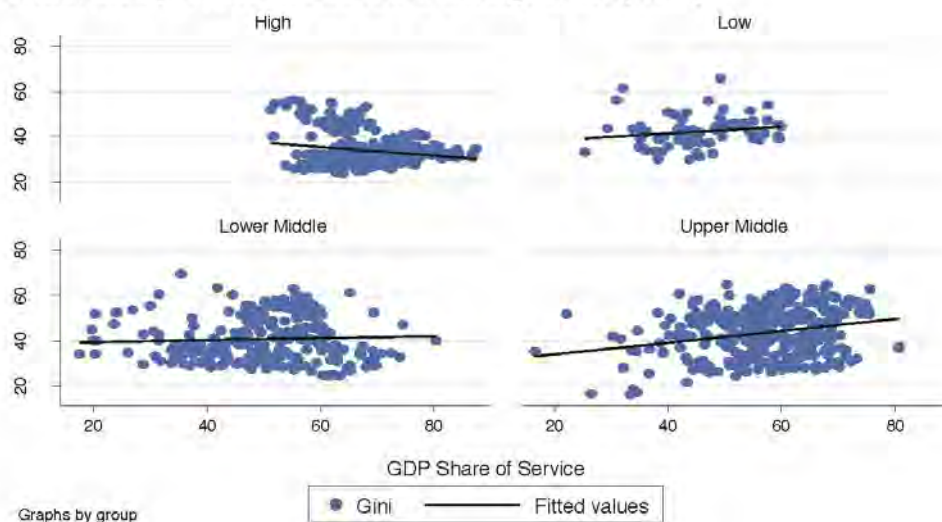
Pakistan, and the Philippines, and large countries like the Russian Federation and Thailand, showed a decline in inequality, whereas Bangladesh and Sri Lanka experienced an increase in inequality. The inequality measured in terms of the Gini coefficient for Bangladesh increased from 30.5 to 32.9.

Among ASEAN countries, in Indonesia, Laos and Vietnam, the Gini coefficient increased from 29.37 to 34.3, from 32.7 to 34.7, and from 35.6 to 36.8, respectively. Some other ASEAN countries like the Philippines and Thailand showed a downward trend in inequality during this period of time. In Australia as well, inequality increased marginally. In the 1990s, the average inequality measured in terms of the Gini coefficient was 33.7, and in the 2000s it increased to 34.1. Most of the countries have undergone rapid structural change towards services during this period. On the whole, inequality is found to have increased mostly in countries that underwent structural transformation in these two decades. Simultaneous occurrence of structural change and income inequality tempted researchers to study the causal relationship, if any, between the two.

Globalization, Structural Transformation & Income Inequality

In our study "Structural Change, Trade, and Inequality: Some Cross-Country Evidence", (Asian Development Bank Institute (ADBI) Working Paper No. 763, 2017) we empirically threw some light on the proposition linking structural transformation and income inequality. With a large number of both developed and developing countries during the period 1991-2014, it has been shown that the process of structural transformation has increased income inequality. It has been found that, across countries of different regions, structural transformation has increased income inequality. This can also be seen graphically from *Charts 3 & 4*. From *Chart 3* it can be seen that for high-income and upper middle-income countries, structural change (measured in terms of share of the manufacturing sector) and inequality are negatively related. On the other hand, for lower middle-income and low-income countries, they are positively related. The relationship marginally varies when structural change is measured in terms of share of the services sector (*Chart 4*). It is found, using a regression exercise, that if the GDP share of the manufacturing sector increases by 1%, it causes a 3% increase in income inequality. On the other hand, if the share of

CHART 4

Relationship between structural change & inequality

Source: Authors' own calculation on the basis of data from World Development Indicators.

the services increases by 1%, income inequality is found to increase by 10%.

However, this pattern is found to vary across regions. For example, if the GDP share of the services sector in Asia increases by 1%, income inequality in Asia increases by 8.53%. While structural transformation measured in terms of the share of manufacturing is not found to have any significant impact on inequality in Asia, the impact is positive and significant when structural transformation is measured in terms of the share of services. This result is not counter-intuitive: as Asian countries have moved towards production of services during the 1990s and 2000s, inequality is found to have been exacerbated in these countries. The wage gap between skilled and unskilled labor could be one of the key factors explaining this observed increase in within-country inequality in Asia following structural transformation towards services.

The argument runs as follows: as the economy relies more on modern sectors, where productivity is higher, demand for high-skilled labor increases and that of low-skilled labor decreases, thereby increasing income inequality. Therefore, as resources including labor move from less productive sectors (agriculture) to more productive sectors (manufacturing and services), income inequality increases. Globalization, in particular trade and FDI, and

structural transformation accelerate this process of a widening wage gap between skilled and unskilled labor in developed and mostly in developing countries (Supplement to the International Labour Organization's Global Wage Report 2014-15: *Wages in Asia and the Pacific: Dynamic but Uneven Progress*).

On the whole, in the short and medium term, structural transformation causes rising wage inequality and thus a rise in income inequality. These findings highlight the need for the bottom deciles of income earners in Asian countries to benefit from the process of structural transformation. Trade, FDI and infrastructural development could be the possible policy targets.

13

Rudra Prosad Roy is a research fellow at the Department of Economics at Jadavpur University, Kolkata. He has an M.Sc in applied economics from Presidency College, Kolkata, and an M.Phil in economics from Jadavpur University. He has several international publications to his credit.

Dr. Saikat Sinha Roy is professor of economics at Jadavpur University, Kolkata. His areas of academic interest include applied trade modelling, trade and development, open economy macroeconomics, and issues relating to emerging market economies (EMEs). His work has been published in various national and international journals and edited volumes. He recently co-edited a book titled *International Trade and International Finance: Explorations of Contemporary Issues* (Springer, India, 2016).

8. 若手研究者の参加報告

当財団では、若手研究者を対象に各国有識者等との交流を通じ将来に向けた見識の向上に役立つ場を提供している。今次フォーラム事業においては、早稲田大学院アジア太平洋研究科の浦田秀次郎教授のご推薦により、平川幸子様にオブザーバーとしてご参加いただいた。



平川 幸子

早稲田大学留学センター准教授（アジア太平洋研究科兼任）。早稲田大学アジア太平洋研究センター、同現代中国研究所、同アジア・ヒューマン・コミュニティ（AHC）研究所研究員。学術博士（International Studies）。専門は東アジア国際関係論、アジア地域統合論、日中関係、日台関係。

早稲田大学政治経済学部卒業後、出版社勤務を経て、米国タフツ大学フレッチャー・スクール法律外交大学院にて国際関係学修士号（MALD）、早稲田大学アジア太平洋研究科にて博士取得。早稲田大学アジア太平洋研究科助教、同大学国際教養学部助教を経て、2016年より現職。近著論文に、「中国のエネルギー政策と地域主義外交―「一帯一路」のモデルとしての中央アジア」『アジア太平洋討究』（30号、2018年2月）。

Sachiko Hirakawa is Associate Professor at Center for International Education and Lecturer at Graduate School of Asia-Pacific Studies at Waseda University. She specializes in international politics in East Asia, Asian regional integration, Sino-Japan relations. She received B.A. in Economics from Waseda University, MALD (Master of Art in Law and Diplomacy) from Fletcher School of Law and Diplomacy, Tufts University, USA, and Ph.D in International Studies from Graduate School of Asia-Pacific Studies, Waseda University. Before her current position, she was Assistant Professor at School of International Liberal Studies and Graduate School of Asia-Pacific Studies at Waseda University. Her recent publications “China’s Energy Policy and Regional Diplomacy: Central Asia as a Model of ‘Belt and Road Initiative,” Journal of Asia-Pacific Studies, No.30 (in Japanese, Feb 2018).

平成 30 年度 アジア太平洋地域シンポジウムに参加して
平川幸子（早稲田大学）

はじめに

国際経済交流財団（JEF）若手研究者派遣プログラムの支援で、11 月 22 日、23 日にニューデリーで開催されたアジア太平洋地域シンポジウム（Asia-Pacific Forum 2018）にオブザーバーとして参加した。本シンポジウムは、JEF とインドの RIS（Research and Information System for Developing Countries）との共催である。ニューデリーに拠点を置く RIS は、国際経済開発、貿易・投資・技術の問題を専門とする独立研究機関であり、南南協力や多国間協力枠組み内の途上国間連携を促進する政策対話フォーラムを積極的に開催している。「Protecting the Global Trading System and the Role for Multilateralism（世界貿易体制と多国間主義の役割を保護する）」と題された本シンポジウムには、日本、韓国、中国、台湾、ASEAN 諸国、インド、豪州、ニュージーランドから、各国の政策ブレーンでもある実務家や研究者が参加し、活発な意見交換や討論が展開された。

会議開催の背景には、世界的規模で起きている保護主義の台頭、米中貿易戦争など大国政治の潮流がある。これらの傾向は、国際貿易や途上国経済に負の影響を与えるだけでなく、国際社会が育んできた多国間主義やグローバルな制度や規範、秩序観を揺るがしている。また、前例のない速度で根本的に人間社会を変化させる技術革新の波が、不安定な国際情勢を一層複雑にしている。

近年、提唱されている「自由で開かれたインド太平洋」構想では、日本とインドのパートナーシップが成功のカギを握る重要な要素となる。開会の辞において、日下一正・JEF 会長は、制度化や不平等の問題を見直した上での「ベター・グローバリゼーション」の実現が必要であり、そのためには国際協力が何より不可欠だと強調した。米国に期待できない今、アジア太平洋地域がその推進役となるべきであり、特にインドは広域的協力において政治・経済面で最適な位置にあると述べた。これに対しインド側からも、技術や知識の独占は社会分裂を招きグローバリゼーションを妨害する、だからインドは多国間主義を支持する（Amar Sinha 氏）、ルールに基づく多国間主義、平等な責任分担こそがインドの利益である（Preeti Saran 氏）との立場が述べられ、2019 年に G20 議長国となる日本には、多国間主義の中心性を示して欲しいとの期待が表明された。

本シンポジウムは、「貿易と新たな技術」「地域統合に向けての必須要件：サービスセクターの増大する役割」「インド太平洋地域における SDGs の重要性と役割：SDGs 達成のための戦略」という三つのセッションで構成された。本稿では、各セッションで出された主な意見や議論をふり返り、最後に個人的な所感を述べたい。（なお、本稿では紙幅の関係で、参加者の肩書は割愛する。）

セッション1「貿易と新たな技術」

多国間枠組みには、本来、貿易レ짐や非関税処置を通して、生産能力を多国間に拡散する作用があるが、現実には産業高度化に成功するのは少数の先進国である。同様な現象は、インダストリー4.0、バイオテクノロジー、マテリアル・サイエンス、ナノテクノロジーなど次世代技術の開発生産においても続くのだろうか。新時代のサプライチェーンは知識フローでもある。途上国にとって、先進エコノミーの不関与や保護主義の台頭による多国間対話の停止は、発展空間をめぐる交渉以前に、産業の高次化自体が否定される意味を持つ。このような問題意識に基づいて、本セッションは Amar Sinha 氏（インド）の司会により 5 名のパネリストが発言した。

Man-Jung Mignonne Chan 氏（台湾）は、地域ぐるみの輸出経済が発展した東アジアでは、分業化による製造方法やスキル、生産機能など成功レベルの違いが、逆に次世代技術への対応のジレンマになっていると指摘した。インダストリー4.0 においては、競争力や生産能力、連結性の視点から各国政府が具体的な強化策を施す必要がある。Jayasiri Jayasena 氏（マレーシア）も、インダストリー4.0 が過去の産業革命と違うのは、脆弱な中小企業も含めて全体が 4.0 構造を求められることであり、それゆえに政府の支援が必要だと述べた。途上国から見たインダストリー4.0 は、協力によって技術移転を行うことがベストの選択であり、豪マ、日マのような関税措置だけではない技術協力を含む FTA の増加が有効であると提言した。

Murray McLean 氏（豪州）からは、現在台頭している保護主義は近視眼的な腹いせ的な性質であり、国内的人気を得るためのナショナリズムの側面が強いという懸念が示された。インダストリー4.0 の技術は、各国単位の推進とともに長期的、国際主義的な環境でドミノ式、カスケード式に拡散することが望ましいが、現今の国際政治環境が大きな障害となっている。Symon Tay 氏（シンガポール）は、インダストリー4.0 は人々の雇用や競争力に確実にインパクトを与えるが、乗り遅れて苦境に立たされる人々が出ないようにする（Leave No One Behind）精神と政策が最重要だと「人々」の視点を強調した。技術産業だけではなく、第一次産業で働く人々への影響、サービス産業のアウトソーシング、人の移動などを包括的に考慮する必要がある。最後に、Nuttawut Laksanapanyakul 氏（タイ）は、同国の自動車産業を事例に新技術時代の発展モデルを提案した。「中所得国の罠」に陥らずに成長を続けるためには、①技術キャッチアップ、②連結性の活用、③環境破壊なき労働生産性向上、という三つを連動させたパターンへの転換が必要である。

パネリストの発言後、会場からは、アジアに多く見られる高齢化社会、労働力不足、人口減少の問題を、外国人労働者とともに技術によって解決する視点が必要ではないかという指摘、日本の自動車産業で技術を学んだ留学生が帰国するパターンから何を得られるか、農業を自由化し IT ビジネス化できるのか、などの問いが出された。筆者にとって本セッションの最大の収穫は、新技術が人々の暮らしに与える影響について新たな知識を得たことにより具体的な想像力が鍛えられたことであつた。

セッション2「地域統合に向けての必須要件：サービスセクターの増大する役割」

途上国ではサービス分野の成長が顕著であり、今後、ASEAN では GDP の 70% を占めるという予測もある。RCEP, CPTPP などメガ FTA はサービス市場の自由化を推進し、FDI 規則、電子商取引、GATS のモード 3（業務上の拠点を通じてのサービス提供）と 4（自然人の移動によるサービス提供）の交渉が進められている。業種も交通、建設、旅行など伝統的分野に加えて、IT に基づく金融、観光、アウトソーシングによるビジネスコンサルタント、会計業務など大幅に増加しており、これらはグローバル・バリュー・チェーンにより高度に専門化、分業化されている。本セッションでは、原岡直幸氏（JEF 専務理事）を司会に、6 名のパネリストがアジア太平洋地域におけるサービス貿易の傾向、ルール形成上での注意点、問題点を討議した。

Choong-Yong Ahn 氏（韓国）は、インダストリー 4.0 をインクルーシブな成長にするための国際協力とルール形成を進めること、TiSA（新サービス貿易協定）を公共財とすること、加えて短期的なヘッジファンドを監視する必要性を強調した。人的交流を促進するために観光産業、特にオープン・スカイ協定がプライオリティになる。Pradir De 氏（インド）は、インドから見て ASEAN のサービス貿易は依然、規制が強いと述べた。ASEAN 域内での市場アクセスが進展せず、国内での規制撤廃目標も政策コミットメントの欠如から達成の見通しが低い、ASEAN 各国の規則に依然として差異が大きい、ASEAN 内の越境労働も高度人材分野でしか対策が取られていないなどの原因を指摘した。Gary Hawke 氏（ニュージーランド）は、サービス貿易が効率よく遂行されることが経済統合の成功の鍵となると強調した。貿易担当者間の交渉に依存するよりも、むしろ各国の規制当局者が直接接触できる方法を探す必要があるという。

Anita Prakash 氏（ERIA）は、教育支出と GDP の割合を示し、ASEAN の約 4 % は、日本の 3 % よりも多いが、スウェーデン 8 %、フィンランド 7 %、その他欧米諸国の平均である 5 - 6 % と比べても低く、研究開発やスキル向上への投資が少ない問題を指摘した。また、RCEP 交渉に関して、ネガティブ・リスト方式への転換が初期交渉への意欲を減退させないかの懸念を示し、ポジティブ・リスト方式の有用性にも言及した。浦田秀次郎氏（日本）は、デジタル・エコノミーを取り上げた。電子通信が発展すれば、人やモノの輸出入が不要になる場合も多く、医療・教育分野でも世界的競争での敗者に対する一時的な保護措置が必要となる。C2C（一般消費者間の取引）のような新形態への対応、データフィクション（SNS や検索データからのデータ集積や分析）とプライバシー保護の問題など新たな問題が多い。ルール作りでは、CPTPP の電子商取引チャプター、WTO での日米 EU 貿易担当大臣合意などを推進の基盤にできる。Zhang Jianping 氏（中国）も、中国のフィンテックやキャッシュレス決済などの進行を紹介しながらプライバシーやセキュリティの課題に言及した。米中貿易も、実はサービス部門では中国は常に赤字で悩んでいる。中印関係については、サービス部門で強いインド、製造部門の強い中国は相互補完的に発展できると述べた。

これらの発言に対して会場からは、デジタル・エコノミーでは倫理教育が最も大事であり、共感や互惠の精神を育む教育を実践するべきとの提案、新技術は中小企業を含め

て誰もが使えるようにするべきだが、同時に軍事利用もされやすく、国家主義がルール形成の障害になるとの指摘、政府自体がデジタルを推進する場合、競合となって民間を圧迫しないか、政府サービス自体を自由化できるか、電子政府はどうあるべきか、などの問題提起がなされた。第一セッション同様、新技術がもたらす新たなサービス貿易について多くの時間が割かれたが、筆者にとっては、倫理や教育、人間という本質的な問題を提起する参加者の姿勢が印象的であった。新時代を想像しながら、国家と市場、政府と民間、政治と経済という政治経済学のフレームワークを捉え直す必要を感じた。

セッション3 「インド太平洋地域における SDGs の重要性と役割：SDGs 達成のための戦略」

インド太平洋地域では、貧困、不平等、ディーセント・ワーク（働きがいのある人間らしい仕事）不足、社会保障の不備、技能格差が顕著であり、SDGs が約束する「インクルーシブな成長」達成には困難が多い。健康、福祉、水道衛生、インフラのガバナンス、気候変動や防災レジリエンスなど課題が山積している。多面的な諸問題には相互連関性もあり、消費や都市生活、環境保護の持続性は依然脆弱である。地域協力は元来、各国家が越境的問題にどれだけ深く関与し、地域的公共財を生み出せるか、そのための安定的な平和環境を推進できるかという試みであった。本セッションでは、Sachin Chaturvedi 氏（RIS 所長）の司会で、4 名のパネリストが地域協力と SDGs の関係を検証した。

Yose Rizal Damuri 氏（インドネシア）は、経済発展の早い国家ほど、貧困の減少と共に不平等が増加する現象が顕著であり、アジアでは特に経済発展と SDGs の整合性が取れていない点を指摘した。今後、アジア全体で高齢化が進むことから、全ての利害関係者による連携的なエンパワーメントが急務であり、ASEAN や APEC のイニシアチブが求められる。Vo Tri Thanh 氏（ベトナム）は、デファクト地域統合からの事例研究の必要性を強調した。自由貿易は理論上、比較優位でウィンウィンを実現し貧困削減に貢献するが、現実には、市場で不平等が生まれ、国際統合と国内改革の相互作用、短期・長期のインパクトの差異など複雑な事態が起きる。

Josef T. Yap 氏（フィリピン）は、現今の国際政治の動向から、再度、金融危機が起きれば、SDGs への道のりが脱線する可能性があるとの指摘し、危機の予防、管理ツールとしてのグローバル金融セーフティネット（GFSN）を提唱した。CMIM（チェンマイ・イニシアチブ）のような金融アレンジメントを強化できれば、各国政府は外貨準備に充てている資金を安心して開発目的に回すことができる。Saikat Sinha Roy 氏（インド）は、アジアではサービス業の GDP に占める割合が 1 %増加すると所得不平等は 8.53%増加するという統計を紹介した。製造業への構造変化は所得不平等をほぼもたらさなかったが、サービス業ではスキルの有無での給与差が大きい。市場拡大に伴い周縁化、貧困化する人々を集団的にエンパワーメントする必要がある。

会場からは ASEAN の役割についての意見が多く出された。ASEAN 統合イニシアチブ（AII）の責任の重要性、地域協力を推進する「正直なブローカー」の確保、ASEAN

が強大化すると逆に協力しにくくなり中心性が低下する、ASEAN は目標の優先順位を決めなければならない、最優先は経済開発のための連結性である、ASEAN 内での CLMV キャッチアップを成功させれば地域統合のよい参照例になる、などの意見が出された。サービス部門への産業構造変化がもたらす不平等の問題にも強い関心が向けられ、関連して教育投資の改善策への提言もあった。本セッションのテーマは、筆者の研究テーマと最も近いが、繰り広げられた専門的議論の根底に、「人々」に対する温かな視点が貫かれていることが感じられて嬉しく思った。アジアには、地域の歴史、社会文化など地域の特徴にあった地域制度、地域協力の型がある。それは欧米型の個人主義、契約主義とは異なると感じてきたが、会場の議論からアジア型のアプローチを具体的に考えるヒントを得られた。

おわりに

2 日目午前中には参加者だけによる非公開のラウンドテーブル・ディスカッションが行われた。そこで出された意見も含め、多様な論点を整理し総括することは容易ではない。様々な観点やレベルで、実に多くのことを学んだが、最後に全体を通して見えてきたのは、共通の課題の解決を図るためには複眼的思考と重層的実践が不可欠だ、という方法論であった。普遍的な「人々」の福利厚生と幸福の実現という共通目標のために、グローバル、リージョナル、ナショナル、そしてインディビジュアルという複数の次元から様々な努力や試行錯誤が続いている。それらをバラバラではなく巧妙かつ戦略的に連携させることで、柔軟で強い一つの流れを作り出せる、というイメージを描くことができた。

たとえば、機能不全が目立つ WTO も、国内政策を改革する際の「外圧」機関として使えばよいという発言があった。各国政府にとっては、特定国家を名指す敵対的「外圧」ではなく、クッションを置いた「言い訳」となる。このように、正面からの効果でなくとも、ナショナルを支えるグローバルな WTO の存在意義は十分ある。実質的なルール形成は、現実には有志国によるプルリラテラルが担うことになるだろう。しかし、それがしっかりと先遣隊の意識を持ち、後発参加国を十分想定しておくことで、グローバルな実現に近づく。各アクターが、異なるアクターの連動を見据えて、時に腹芸を使いながら行動することで、大きな目的の達成への可能性が高まる。

多種多様な国家から構成されるアジア太平洋・インド太平洋の地域協力の意義は決定的に大きい。ASEAN や APEC が実質的成果を出すことが、将来のグローバルへの示唆と見本になる。経済統合を担う CPTPP と RCEP には、水準だけではなく目的の差もある。まずは全参加型である RCEP を実現させる挑戦、そして二つのメガ FTA を統合させて水準を上げる挑戦が続く。困難な道のりだからこそ、仲間と一緒に続けることが必要だ。共通の意思の下、それぞれの位置や役割を相対的に再確認し、より正確に自覚して共同の努力を続けるために、このような国際シンポジウムの方が必要なのだと改めて感じた。

2 日間の日程を通し、正式会合以外の時間でも、他の参加者と個人的な交流の時間を持

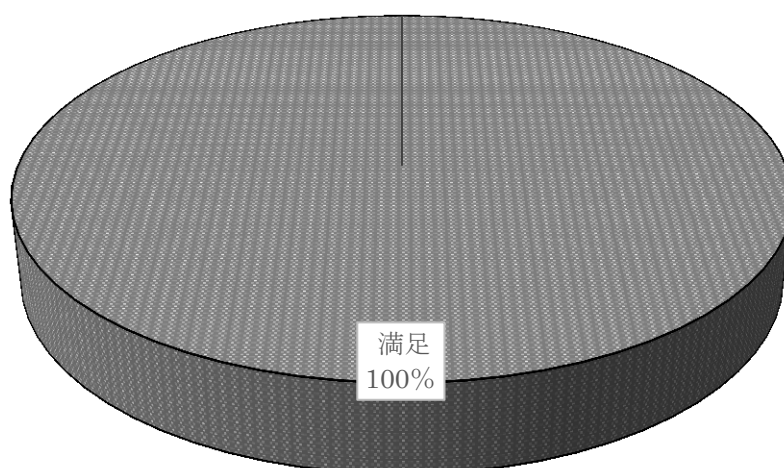
つことができた。「人の世を作るのは、神でもなければ鬼でもない。やはり向こう三軒両隣りにちらちらするただの人」という夏目漱石の言葉があるが、グローバル化の時代では、国境を越えた個人のネットワーキングが「人の世」を作るのだろう。そして、戦後のアジア太平洋地域には、民間の「人々」を主役としてボトムアップ型で「地域」を形成してきた伝統がある。今回、出会えた参加者は全員著名な専門家で、到底「ただの人」ではない。しかし、食事の時間や移動の車中などに共に過ごしたプライベートな時間が、意外と出発点になるかもしれない。今回、プログラムに推薦して下さった浦田秀次郎先生、温かく受け入れて下さった国際経済交流財団の日下一正会長、原岡直幸専務理事、土屋隆業務部長を始め、お世話頂いた全ての方々に改めて感謝申し上げます。

9. 公開シンポジウム アンケート集計報告

(聴衆 110 名にアンケート調査を実施し、28 名 (回収率 25.45%) の回答が得られた)

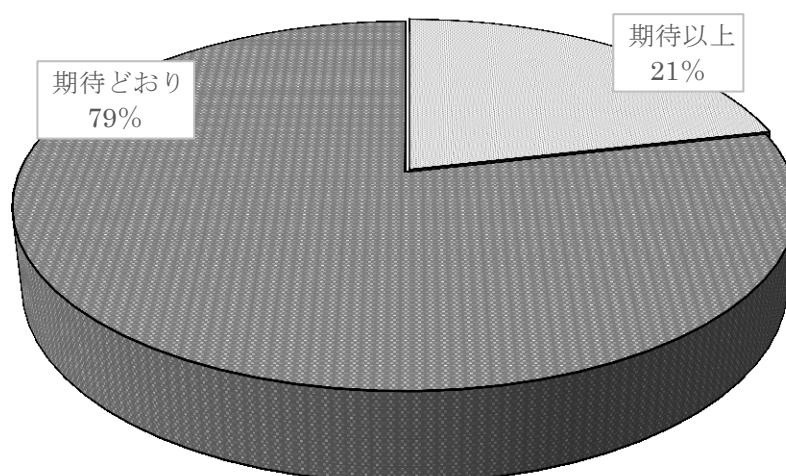
Q1. 全体を通じての感想をお答えください。

	満足	概ね満足	やや不満	不満	無回答
Count	28	0	0	0	0
Rate %	100	0	0	0	0



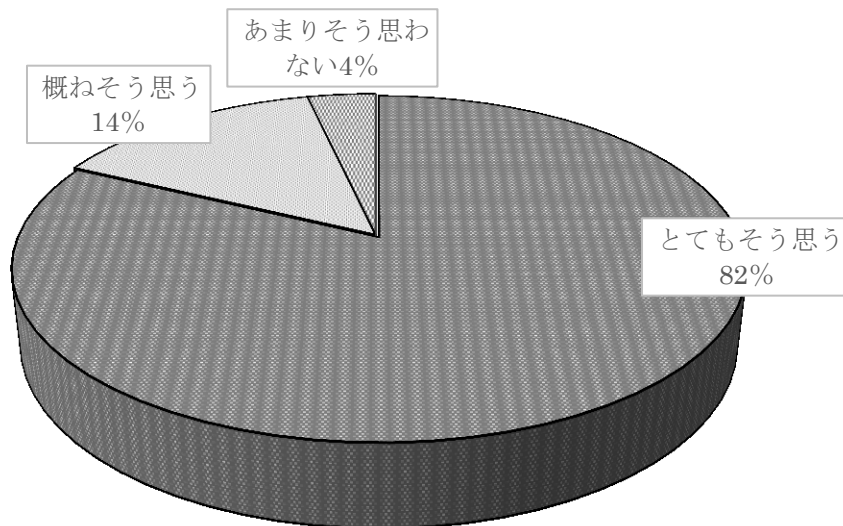
Q2. あなたの期待と比較してシンポジウムの質の評価は？

	期待以上	期待どおり	やや 期待以下	期待以下	無回答
Count	6	22	0	0	0
Rate %	21	79	0	0	0



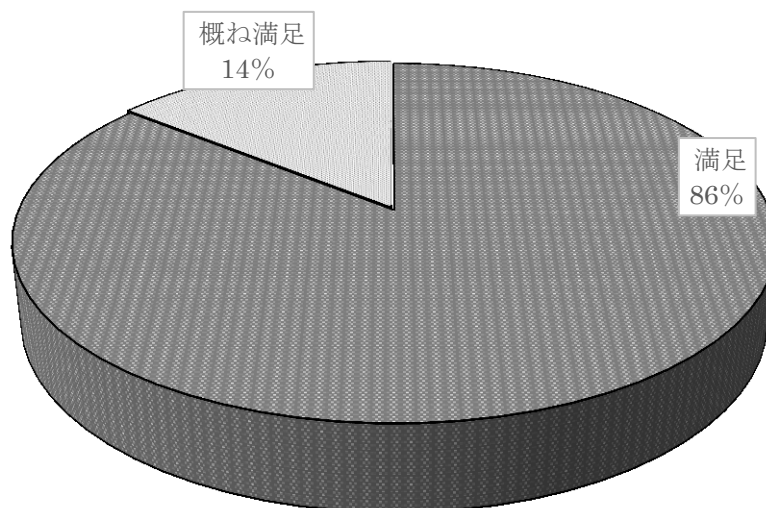
Q3. トピックはタイムリーでしたか？

	とても そう思う	概ね そう思う	あまりそう 思わない	そう 思わない	無回答
Count	23	4	1	0	0
Rate %	82	14	4	0	0



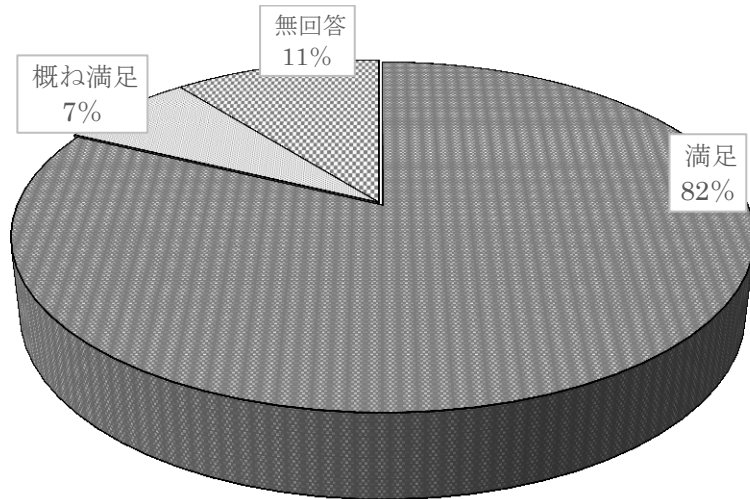
Q4-1. 基調講演の評価はどうでしたか。

	満足	概ね満足	やや不満	不満	無回答
Count	24	4	0	0	0
Rate %	86	14	0	0	0



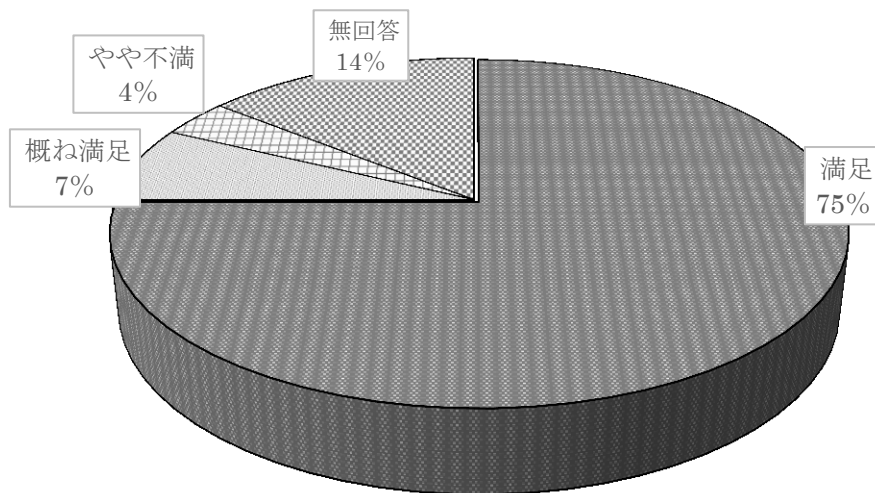
Q4-2. パネルセッション1の評価はどうでしたか。

	満足	概ね満足	やや不満	不満	無回答
Count	23	2	0	0	3
Rate %	82	7	0	0	11



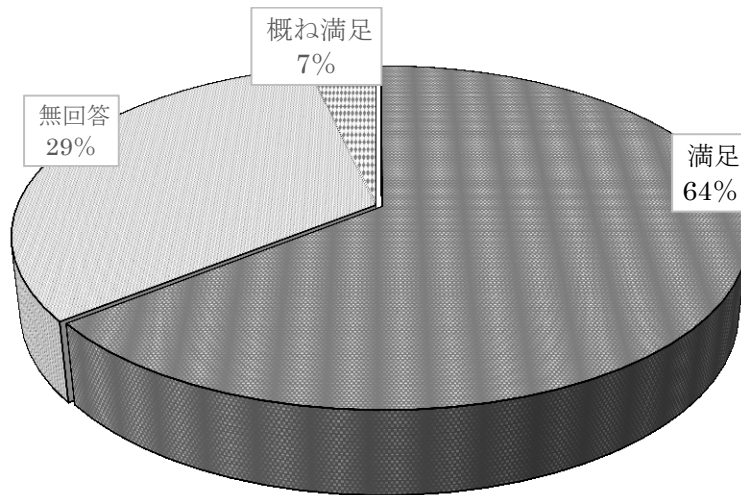
Q4-3. パネルセッション2の評価はどうでしたか。

	満足	概ね満足	やや不満	不満	無回答
Count	21	2	1	0	4
Rate %	75	7	4	0	14



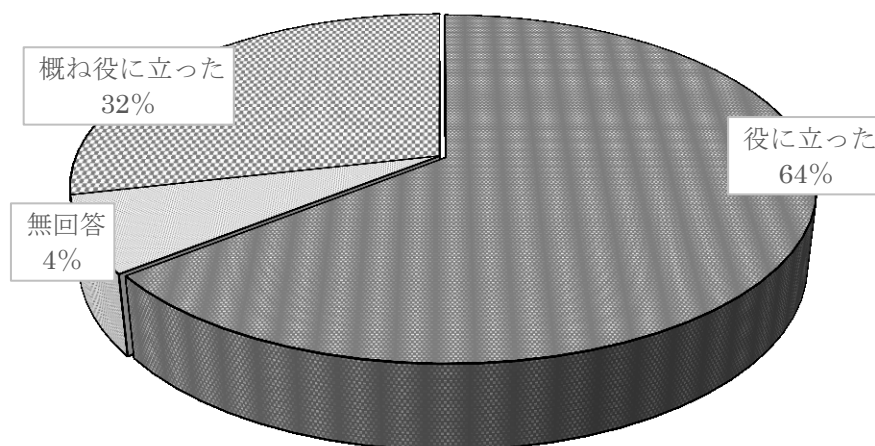
Q4-4. パネルセッション3の評価はどうでしたか。

	満足	概ね満足	やや不満	不満	無回答
Count	18	2	0	0	8
Rate %	64	7	0	0	29



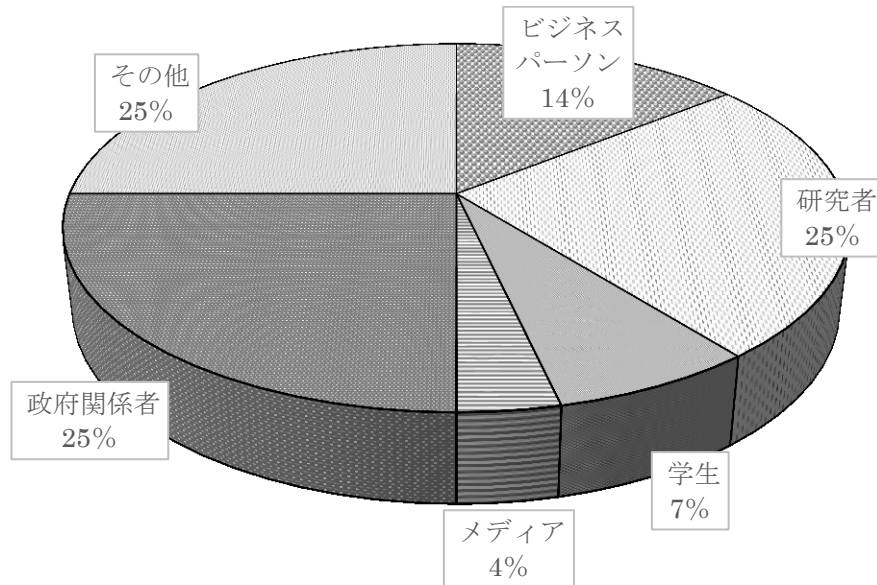
Q5. シンポジウムの議論があなたの業務・研究に役立ちましたか？

	役に立った	概ね役に立った	あまり役に立たなかった	役に立たなかった	無回答
Count	18	9	0	0	1
Rate %	64	32	0	0	4



あなたのご職業を教えてください。

	ビジネス パーソン	大学 教員	研究者	学生	メディア	政府 関係者	その他
Count	4	0	7	2	1	7	7
Rate %	14	0	25	7	4	25	25



10. 成果

アジア・太平洋地域に於ける FTA の推進を目指して 2003 年に開始した当財団主催の日アジア太平洋フォーラム年次会合は、2014 年のシンガポール開催から当地域での持続的かつ包摂的な経済成長に貢献すべく、①地域統合の推進、実体経済における **global value chain** の展開を踏まえ TPP や RCEP の交渉の進展に寄与するための従来型トピック、に加えて②FTA 交渉が各国の持続的成長に資する構造改革を進めるための手段 (**vehicle**) との観点から、貿易投資自由化、ひいては地域経済統合にむけての各国内の政治・社会・経済面での制約 (“**behind-the border-measures**”)、③とりわけ、第 4 次産業革命-デジタル革命の進展に伴う各国の包摂的成長への課題とそれらの克服といった内容を取り上げてきている。

2018 年度の今次会合は通算 17 回目となった。今回においても上記問題意識を継続し、11 月 22 日 (木)、23 日 (金) ニューデリーにおいてインド政府系のシンクタンクである開発途上国研究情報システムセンター (**Research and Information System for Developing Countries: RIS**) との共催で、アジア太平洋地域シンポジウムを開催した。全体テーマ「世界貿易体制と多国間主義の役割を保護する」(**Protecting the Global Trading System and the Role for Multilateralism**) と、その下に 3 つのパネルセッションを設けて、公開シンポジウム (22 日午後) と非公開ラウンドテーブル・ディスカッション (23 日午前) を行った (会場はともに RIS が入居する **Indian Habitat Center** の会議場)。今回の開催地インドは、**Software** 産業に加え、**IT**、**Robotics**、**Make-in-India** イニシアティブを推進し、モディ首相のリーダーシップの元“**Ease of Doing Business**”のランキングが大幅に改善するなど、自由な貿易と投資、そして第 4 次産業革命を語るに最適なところであった。

全体テーマ：世界貿易体制と多国間主義の役割を保護する

(**Protecting the Global Trading System and the Role for Multilateralism**)

セッション 1. 貿易と新たな技術

(**Trade and New Technology**)

途上国から見れば、物品は多国間貿易協定により外国市場への参入が可能であるが、技術分野では多国間貿易協定ルールにある措置で、**Industry4.0** などによる新しい技術の出現を自国の製造業育成に活用できず、工業化を進められないという不満がある。如何にして克服するのか、グローバル、地域大の観点でそのようなことを可能にする貿易体制はどのようなものが議論のポイントとなった。

セッション 2. 地域統合に向けての必須要件：サービスセクターの増大する役割

(**Imperatives for Regional Integration: Growing Role of Service Sector**)

サービス産業の成長はアジア・太平洋地域でも各国の成長に大きく貢献しており、**Industry4.0** が進む中でインフォメーション技術やデジタル技術などの活用によるサービス貿易も拡大している。こうした中で、当地域での経済統合の深化を進めるには

どのような課題があるのか？その解決策は何か？を中心に議論を展開。議論のポイントは、①当地域でのサービス貿易の拡大に結び付く有望なサービス産業の分野は何か？②デジタル技術の進化を如何にしてサービス貿易の拡大につなげるのか？③各国の国内消費者の個人データ保護に必要な規制や仕組みはなにか？など。

セッション 3. インド太平洋地域における SDGs の重要性と役割：SDGs 達成のための戦略 (Importance and Roles of SDGs in the Indo-Pacific Region: Strategies for Attainment of SDGs)

国連が提唱する「我々の世界を変革する持続可能な開発のための 17 の目標」に関して、当地域の発展途上国が抱える課題とその解決のための対策について議論した。とりわけ、17 の目標のうち、4 名の当セッション・パネリストの出身 4 か国の共通項であり、喫緊の課題である貧困の撲滅、拡大する所得・資産格差の是正が中心的なテーマとなった。

今回のフォーラム（公開シンポジウム＋非公開ラウンドテーブル・ディスカッション）の参加者は共催機関である RIS、並びにインドの政府関係者や研究者の地元勢 5 名に加えて、当財団が招聘した 12 の国・地域の 12 名（日本、ニュージーランド、豪州、中国、韓国、フィリピン、インドネシア、マレーシア、シンガポール、タイ、台湾、ベトナム（ミャンマーは人選が整わず）、及び東アジア・アセアン経済研究センター（ERIA）1 名を合わせた 18 名の専門家・有識者に当財団 2 名（日下会長、原岡専務理事）を加えた総計 20 名であった。日本からは浦田秀次郎 早稲田大学大学院アジア太平洋研究科長・教授を招聘した。また、若手研究者の育成を目的に、早稲田大学留学センター・アジア太平洋研究科兼担の平川幸子准教授をオブザーバーとして招聘した。

22 日の公開シンポジウム、23 日の非公開ラウンドテーブル・ディスカッションでの主な論点、興味深い論点についていくつか紹介する。

- 1) セッション 1：途上国が世界でうまれた新技術を導入するには自国におけるそれら知的財産権（IPR）の保護がきちんとされていることが前提であり、加えて技能を有する人材が十分に備わっていることが必要であることは当然である。FTA は技術分野の提携までは依然として推進していないとの指摘はあるものの、FTA の中には、ハイレベルのものがあり、それは技術提携を後押ししている。アジア・太平洋地域は製造、及びサービスの分野の世界のハブ（中心）を目指しており、多くの企業がサプライチェーンを担い、お互いに依存関係にあるので、技術進歩が域内で同調するように域内での FTA や人材育成他の協力を図ることが必要。
- 2) セッション 2：サービス貿易は、輸送、教育、医療、観光、通信、IT ソフトウェア、e-commerce 等多岐にわたる。サービス貿易は、物品貿易に比べて、各国の国内の規則によりかわりがあり、国境を越えるスムーズな投資や事業活動には各国間での規則に関わる協調が必要。デジタル化は当域内の国家間で進展に差があることから、その是正に向けて多国間での支援・協力が必要。デジタル化対応ルールは、TPP11 に盛り込まれているので、RCEP にも取り入れるべき。WTO といった世界規模での

ルール作りは難しいので、先ずは、地域内で行うのがベスト。デジタル活用のサービス貿易では小規模な企業が従事することが多く、大規模企業を含む公正な競争政策、データの国境を越えた流れ、消費者の個人データ保護などが難しい課題。

- 3) セッション3：アジアでは、貧困レベルに属する人口は、数自体は減少しているが、依然として多数。しかも、近年減少率が低下している。他方で、所得・資産格差は拡大中である。これは、教育、医療、衛生環境などでの機会の差がもたらしており、所得・資産格差が広がることは経済成長に悪い影響をもたらす。その対応策として挙げられたいくつかの提案は、①地域大での協力機関の創設、②各国政府が対策資金を生み出せるように、地域大で金融・財政面での相互協力を強化する、などであった。興味深いコメントとしては、格差拡大の要因について、産業構造でサービス産業化が進むと、格差が拡大するという研究結果があるというものであった。

上記の22日公開シンポジウム、23日の非公開ラウンドテーブル・ディスカッションの成果としては、以下が挙げられる。

- 1) 公開シンポジウムが共催者 RIS の尽力で、成功裏に開催されたことである。スピーカー・パネリストとして、JEF2名、JEF 招聘 13名、RIS アレンジ 5名の計 20名が活発に討議。予想を上回る 110名 (RIS 集計) が聴衆として参加し、スピーカー・パネリストとの活発な質疑応答が行われた。
- 2) 情報提供の観点では、公開シンポジウムは、参加した一般聴衆の満足度が高かったことが成果である。満足度アンケート調査 (当財団アンケート満足度 4 段階方式) を行ったところ、28名から回答を得た (回収率 25.45%)。そして、28名の回答者全員が最上位の「満足」であった (100%)。
 - 参加の事前の期待に対する参加の結果の比較を問う「あなたの期待と比較してシンポジウムの質の評価は？」では、最上位の「期待以上」21.0%、第 2 位の「期待どおり」79.0%という結果であった。
 - また、上記アンケート調査の中で、「シンポジウムでの議論があなたの業務・研究に役立ちましたか？」の問いを設けたところ、回答者 27名中最上位「役に立った」18名、第 2 位「概ね役に立った」9名と、全員がポジティブな回答であった。
 - 以上のとおり、全体の満足度が高く、期待にそった高いレベルでの議論、そして役立つ内容であったことなど、インドの聴衆からシンポジウムに対して高い評価をいただいたことは当事業の成功を示している。
- 3) アジア太平洋地域での当事業の波及効果という観点では、当財団は、今回の日アジア太平洋フォーラム (公開シンポジウム+非公開ラウンドテーブル・ディスカッション) に ASEAN 6 か国 (フィリピン、インドネシア、マレーシア、シンガポール、タイ、ベトナム)、日本を含むアジア大洋州 6 か国・地域 (日本、ニュージーランド、豪州、中国、韓国、台湾)、及び在ジャカルタの国際研究機関 ERIA (東アジア・アセアン経済研究センター) から合計 13名の専門家を招聘した (常連のミャンマーは、

インドの入国ビザ申請のタイミングまでに人選が整わず残念ながら今回は断念した)。招聘対象の専門家は過去3年間で定着してきており、議論も充実して来ている。これら専門家が本国での活動にシンポジウムの結果を活用することが期待できる。更に、当財団にとっては、これらの人的ネットワークは次回以降の共催機関を決める際に大変有効であり、また当財団発行の英文誌 **JapanSPOTLIGHT** への寄稿にも活用できている。

- 4) そして、当財団が招聘した上記参加者からの評価が高いことも成果である。2日間を通しての満足度のアンケート調査（当財団アンケート満足度 4 段階方式）を行ったところ、回答者 12 名中全員が最上位「満足」の回答であった。また、「期待と比べて成果は？」の問いには、最上位の「期待以上に高かった」4 名、第 2 位の「期待通り高かった」8 名と全員からポジティブな回答を得、参加者に高く評価いただいた。
- ー また、「当フォーラムでの議論が貴国政府の政策形成にどの程度役立つか？」の問いには、最上位の「役立つ」10 名、第 2 位「概ね役立つ」2 名と、全員から政策形成に役立つとの良い評価をいただいた。

主なコメントは：

- 今回の会合でとりあげたテーマ、課題はタイムリーかつ重要であり、議論を通じて多くの興味深いポイントが見いだせた。
 - RCEP の成立を加速させるべき。世界での多国間 (Multilateral) 貿易システムの推進が困難な現在、このシステムを守るために、域内多国間 (Plurilateral) の合意を推進、活用すべき。
 - 次回の会合のテーマとして次は如何か？①持続的、包摂的發展にむけた CPTPP、RCEP の実現、②地域統合、コミュニティ構築そして SDGs の達成、③破壊的技術革新：世界の価値チェーンへのインパクトと中小・零細企業の役割。
- 5) なお、シンポジウム運営上の改善点としては、2017 年のマニラでの会合の際に、各スピーカーのプレゼンテーションを地元共催者の意見で 10 分としたことで、会場との質疑応答やパネリスト間の議論の時間が無くなり、尻切れトンボとなったことを反省し、各スピーカー（被招聘者）に対して持ち時間 5 分を事前に徹底するとともに、シンポジウム当日には、モデレーターにきちんと時間管理を行ってもらったことである。この結果、会場との質疑応答、パネリスト間での議論などが時間的に可能となった。このことは聴衆、被招聘者の高い満足に繋がったと解釈される（被招聘者のコメントにもその旨あった。）
- 6) これらの議論の詳細は、当財団のホームページに掲載されており、実際にフォーラムに参加した方々に加えて、今後多くの方に見ていただくことにより、波及効果が期待される。

11. 共催団体紹介



Japan Economic Foundation (JEF)

The Japan Economic Foundation (JEF) was established in July 1981 to deepen understanding between Japan and other countries through activities aimed at promoting economic and technological exchange.

With this goal in mind, JEF engages in a broad range of activities such as providing information about Japan and arranging venues for the exchange of ideas among opinion leaders from many countries in such fields as industry, government, academia and politics in order to build bridges for international communication and to break down the barriers that make mutual understanding difficult.

URL: www.jef.or.jp



Research and Information System for Developing Countries (RIS)

Research and Information System for Developing Countries (RIS) is a New Delhi-based autonomous policy research institute that specializes in issues related to international economic development, trade, investment and technology. RIS is envisioned as a forum for fostering effective policy dialogue and capacity-building among developing countries on global and regional economic issues.

The focus of the work programme of RIS is to promote South-South Cooperation and collaborate with developing countries in multilateral negotiations in various forums. RIS is engaged across inter-governmental processes of several regional economic cooperation initiatives. Through its intensive network of think tanks, RIS seeks to strengthen policy coherence on international economic issues and the development partnership canvas.

URL: www.ris.org.in

12. 事務局

(日本側)

一般財団法人国際経済交流財団／Japan Economic Foundation (JEF)

住 所：〒104-0061 東京都中央区銀座 3-7-3 銀座オーミビル 5 階

T E L : 03-6263-2517 FAX : 03-6263-2513

U R L : www.jef.or.jp

担 当：業務部長 土屋 隆

業務部 井上 真弓

[業務運営委託先]

日中平和観光株式会社／NICCHU PEACE TRAVEL SERVICE CO., LTD.

住 所：〒103-004 東京都中央区東日本橋 2-7-1 国際東日本橋ビル 2 階

T E L : 03-5822-3507 FAX : 03-5822-3515

U R L : www.nicchu.co.jp

担 当：MICE 事業部 佐藤 衛

(インド側)

Research and Information System for Developing Countries (RIS)

住 所：Core 4-B, Fourth Floor, India Habitat Centre, Lodhi Road, New Delhi 110 003

U R L : www.ris.org.in

担 当：Dr. Mahesh C. Arora

平成 31 年 2 月

一般財団法人 国際経済交流財団

JAPAN ECONOMIC FOUNDATION (JEF)

©JEF Printed in Japan 無断の複写転載はお断りします。
