

2021 年度日アジア太平洋フォーラム

Asia-Pacific Forum 2021

“Process of Asia Pacific Cooperation in the  
Post Pandemic Era:  
Opportunities and Prospects”

# 報告書

2021 年 12 月 3 日 (金)

(オンライン 開催)

一般財団法人 国際経済交流財団



競輪の補助事業

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2021 年度日アジア太平洋フォーラム 2021 年 12 月 3 日 (金)  
オンライン会議の様子



開会の辞：豊田正和



開会の辞・基調講演：CHI Fulin 氏



セッション 1：原岡直幸



セッション 1 & 2：  
ZHANG Yunling 氏



セッション 1：  
AHN Choong-Yong 氏



セッション 1：  
Khin Khine NWE 氏



セッション 1：  
VO Tri Thanh 氏



セッション 1：  
Sachin CHATURVEDI 氏



セッション 1：  
Anita PRAKASH 氏



セッション 1：  
Man-Jung Mignonne CHAN 氏



セッション 1：  
Yose Rizal DAMURI 氏



セッション 1：  
Somkiat TANGKITVANICH 氏



セッション 1 の様子



セッション2：  
Murray McLEAN 氏



セッション2：  
浦田秀次郎 氏



セッション2：  
Simon SC TAY 氏



セッション2：  
Gary HAWKE 氏



セッション2：  
Josef T. YAP 氏



セッション2：  
Seri Jayasiri JAYASENA 氏



セッション2の様子



閉会の様子

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## 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の持続的経済成長への貢献と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。

当事業は、アジア太平洋地域で指導的役割を果たす政財界、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の課題解決に向けて率直な意見交換を行い、相互交流と理解を深めて参加各国の政策立案に資することを目的としている。

2003年に第1回を開催、今年度は中国改革発展研究院(CIRD)との共催で第20回のラウンドテーブル・ディスカッションをオンライン形式で行った。

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： 2021年12月3日（金）11:30～14:30（JST）
2. 主催者： 一般財団法人 国際経済交流財団  
Japan Economic Foundation (JEF)  
  
共催者： 中国改革発展研究院  
China Institute for Reform and Development (CIRD)
3. 開催形式： オンライン  
日本側 JEF 財団施設及び各自デバイスより接続  
中国側 中国改革発展研究院施設及び各自デバイスより接続  
他地域参加者 各自デバイスより接続
4. テーマ：  
メインテーマ：  
ポストコロナにおけるアジア太平洋協力の過程：機会と見通し  
“Process of Asia Pacific Cooperation in the Post Pandemic Era:  
Opportunities and Prospects”  
  
セッション1：  
アジア太平洋の成長戦略  
Growth Strategy of Asia Pacific  
セッション2：  
アジア太平洋の経済統合と貿易システム  
Economic Integration and Trade System of Asia Pacific
5. 出席者： 日本及びアジア太平洋地域14国・地域及び関係機関（インドネシア、マレーシア、ミャンマー、フィリピン、シンガポール、タイ、ベトナム、中国、韓国、台湾、インド、オーストラリア、ニュージーランド、ERIA）の代表者、主催・共催機関代表者およびオブザーバー 約50名
6. 使用言語： 英語（一部、中国語⇔英語の同時通訳あり）



### 3. 詳細日程

# Asia-Pacific-Forum 2021

## Agenda

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### “Process of Asia Pacific Cooperation in the Post Pandemic Era: Opportunities and Prospects”

**DATE: FRIDAY, 3<sup>rd</sup> DECEMBER 2021**

**TIME: 11:30-14:30 (JST) /10:30-13:30 (CST)**

(The following description are in JST)

**11:00 – 11:30 Online registration**

**11:30 – 11:35 House-keeping announcement**

JEF (platform operator)

-Norms and style of the forum, agenda and logistics

**11:35 – 11:40 Welcome remarks**

Mr. Masakazu TOYODA, Chairman & CEO, JEF

-Introduction as a new CEO of JEF, expectation and desired outcomes of the forum

**11:40 – 11:55 Welcome remarks and keynote speech**

Mr. CHI Fulin, President of CIRD (with consecutive interpretation)

-Expectation and desired outcomes, set the tone of the forum



**11:55 –13:00     Session 1: Growth Strategy of Asia Pacific**

**Moderator:** Mr. Naoyuki HARAOKA, Executive Managing Director, JEF

11:55 – 12:20     **Speakers:**  
Prof. ZHANG Yunling (China)  
Dr. Prof. AHN Choong-Yong (South Korea)  
Daw Khine Khine NWE (Myanmar)  
Dr. VO Tri Thanh (Vietnam)  
Prof. Sachin CHATURVEDI (India)

12:20 – 12:28     **Comments by Discussants:**  
Ms. Anita PRAKASH (ERIA)  
Dr. Man-Jung Mignonne CHAN (Taiwan)  
Dr. Yose Rizal DAMURI (Indonesia)  
Dr. Somkiat TANGKITVANICH (Thailand)

12:28 – 12:55     **Discussion by all the speakers**

12:55 – 13:05     **Q&A**

**13:05 –13:15     (Coffee break)**

**13:15 –14:20     Session 2: Economic Integration and Trade System of Asia Pacific**

**Moderator:** Prof. ZHANG Yunling, Chair Professor and Dean, Institute of International Studies Shandong University

13:15 – 13:30     **Speakers:**  
Amb. Murray McLEAN (Australia)  
Prof. Shujiro URATA (Japan)  
Prof. Simon SC TAY (Singapore)

13:30 – 13:36     **Comments by Discussants:**  
Prof. Gary HAWKE (New Zealand)  
Dr. Josef T. YAP (Philippines)  
Datuk Seri Jayasiri JAYASENA (Malaysia)

13:36 – 14:10     **Discussion by all the speakers**

14:10 – 14:20     **Q&A**

**14:20 - 14:30**      **Closing Session**

**Summary: Comments and findings**

Dr. HE Dongni, Vice President, CIRDC and Mr. Masakazu TOYODA,  
Chairman & CEO, JEF

**14:30**              **Adjourn**

## 4. 出席者

- Mr. Masakazu TOYODA, Chairman and CEO, Japan Economic Foundation
- Mr. CHI Fulin, President, China Institute for Reform and Development
- Mr. Naoyuki HARAOKA, Executive Managing Director, Japan Economic foundation
- Prof. ZHANG Yunling, Chair Professor and Dean, Institute of International Studies Shandong University
- Dr. Prof. AHN Choong-Yong, Distinguished Professor, Graduate School of International Studies, Chung-Ang University
- Prof. Sachin CHATURVEDI, Director General, Research and Information System for Developing Countries
- Daw Khine Khine NWE, Joint Secretary General, The Republic of the Union of Myanmar Federation of Chambers of Commerce and Industry
- Dr. VO Tri Thanh, Chairman, Vietnam National Committee for Pacific Economic Cooperation
- Ms. Anita PRAKASH, Senior Policy Advisor (International Economic Cooperation), Office of President of Economic Research Institute for ASEAN and East Asia
- Dr. Man-Jung Mignonne CHAN, Chief Strategy Officer (CSO), Forum on Humanities
- Dr. Yose Rizal DAMURI, Head of Department of Economics, Centre for Strategic and International Studies
- Dr. Somkiat TANGKITVANICH, President, Thailand Development Research Institute
- Amb. Murray McLEAN, former Chairman, Dunmore McLean Pty Ltd
- Prof. Shujiro URATA, Professor Emeritus, Waseda University
- Prof. Simon SC TAY, Chairman, Singapore Institute of International Affairs
- Prof. Gary HAWKE, Emeritus Professor, Victoria University of Wellington
- Dr. Josef T. YAP, Senior Technical Advisor, ASEP-CELLs Project
- Datuk Seri Jayasiri JAYASENA, former Secretary General, Ministry of International Trade and Industry
- Dr. HE Dongni, Vice President, China Institute for Reform and Development

## 5. 略歴



**Masakazu TOYODA**

Chairman & CEO,

Japan Economic foundation (JEF)

**Masakazu TOYODA** is Chairman and CEO of the Japan Economic Foundation.

He also serves as Special Advisor to the Institute of Energy Economics (IES, where he was previously Chairman and CEO), Adjunct Professor with the National Graduate Institute for Policy Studies (GRIPS) and is on the Board of Directors for the Pacific International Center for High Technology Research (PICHTR). In 2008, he was Secretary-General of the Secretariat of Strategic Headquarters for Space Policy with Japan's Cabinet Secretariat, and from 2008-08 he was Vice-Minister for International Affairs for Japan's Ministry of Economy, Trade and Industry (previously the Ministry of International Trade and Industry), where he has also held several other positions.



**CHI Fulin**

President,

China Institute for Reform and  
Development (CIRD)

**CHI Fulin**, Senior Research Fellow and Ph.D student supervisor, a member of the 11th and 12th National Committee of CPPCC. He is currently president of China Institute for Reform and Development (CIRD) and . He is also vice chairman of China Society of Economic Reform, vice chairman of China Society of Administrative Reform, a member of the National Experts Committee for Programming Economic and Social Development in the 13th Five-year Plan Period, policy decision-making advisor for provincial governments such as Guangdong, Shandong and Hainan. He is distinguished professor at universities including Peking University, Northeastern University and some others. He, as an expert, has been entitled to the State Council's special allowances. He has been awarded "the Five-One Project Publications Prize", the Sun Yefang Economic Science Award and the China Development Research Award. He is also awarded the title of "Top Outstanding Talents in China" and selected as one of the "100 Economists Who Have Influenced China's Economic Construction in the Last 60 Years". His works are selected and included in the Overview on the academic Achievements of Well-known Chinese Scientists in the 20th Century (Economics Volume). He has been dedicated to the theoretical and practical research of economic system reform for more than three decades. He has published more than 40 monographs in Chinese and English, more than 800 academic papers and more than 70 research reports. He has submitted a large number of policy recommendations, which has exerted positive impacts on decision-making and reform practices.



**Naoyuki HARAOKA**

Executive Managing Director,

Japan Economic foundation (JEF)

**Naoyuki HARAOKA** was born in Tokyo in 1955. 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 and joined JEF as Executive Managing Director.



**Prof. ZHANG Yunling**

Chair Professor and Dean

Institute of International Studies

Shandong University

**ZHANG Yunling**, Academy Member of Chinese Academy of Social Science (CASS); Chair Professor, President of Institute for International Studies, Shandong University. He was Director of International Studies, Director of Institute of Asia-Pacific Studies, CASS, Member of East Asia Vision Group, Chairman of Joint Expert Group for Feasibility Study on EAFTA; Executive Chairman of China-Republic of Korea Joint Expert Committee; Member of China-Japan 21st Century Friendship Commission (2003-2008). Member of National Committee of Chinese Political Consultant Conference (2002-2018.3). Latest Publication: China and Asia Regionalism (English), China and World: New change, understanding and Identification (Chinese), Seeking a benign relationship between China and the world (Chinese), Between the Ideal and Reality-Thinking of East Asian cooperation (Chinese, English, Korean), Centrally grand change: world and China.



**Dr. Prof. AHN  
Choong-Yong**

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

**Dr. AHN** is currently Distinguished Professor at the Graduate School of International Studies, Chung-Ang University Seoul. He is also Co-Chair of the Korea-India Strategic Dialogue organized by the Seoul International Forum. Previously, he was Chairman, Korea Commission for Corporate Partnership (KCCP: 2014-2018) to induce voluntary collaborations between Korea's big businesses and SMEs, and also Chairman of the Board, Korea Electric Power Corporation. Before taking the KCCP post, he served as presidentially appointed Foreign Investment Ombudsman (2006-2014) for foreign direct investors in Korea. He is also 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. He was also a visiting professor to Economic Research Institute, Kyoto University, Japan. 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*, *Global Asia*, and Monograph papers in North-Holland, Cambridge University Press, Springer, Edward Elgar, Palgrave Macmillan, Iwanami Shoten of Japan, Peking University Press, etc.





**Daw Khine Khine  
NWE**

Joint Secretary General  
The Republic of the Union of  
Myanmar Federation of  
Chambers of Commerce and  
Industry

**Khine Khine NWE (Rosaline)** is Joint Secretary General (JSG) of Republic of the Union of Myanmar Federation of Chambers of Commerce and Industry (UMFCCI) and also the Secretary General of Myanmar Garment Manufacturers' Association (MGMA). She heads Responsible Business and Natural Resources Development Committee in UMFCCI and also is a Trustee on the Board of ASEAN CSR Network. She is also a Board member of Myanmar Institute of Directors (MIOD). She is also on the Board of UNGC Network Myanmar and is active in Industrial Relations and has been attending International Labor Conference (Geneva) as Employers' Delegate since 2011.

She holds her Master's Degree from Yangon University, Myanmar and taught at Assumption University in Bangkok, Thailand. She is now Chairman of Myanmar Garment Human Resource Development Center (MGHRDC) and Honorary Principal of UMFCCI Training Institute. She is a member of Accreditation and Certification Committee of National Skill Standard Authorities (NSSA) and is also the Chairman of Manufacturing Sectorial Competency Standard Committee of National Skill Standard Authorities (NSSA). She represented private business sector and became a member of the National Accreditation and Quality Assurance Committee (NAQAC) from 2016 to 2021, Ministry of Education.

	<p>She is a successful business woman leading Best Industrial Co., Ltd, a garment manufacturing company as a Managing Director. Her passion is to help develop an inclusive socio-friendly economic environment in Myanmar that will lead to sustainable, equitable growth and prosperity of the Nation.</p>
 <p><b>Dr. VO Tri Thanh</b></p> <p>Chairman of Vietnam National Committee for Pacific Economic Cooperation (VNCPEC)</p>	<p><b>Dr. VO Tri Thanh</b> is former Vice-president of the Central Institute for Economic Management (CIEM). He is currently Chairman of Vietnam National Committee for Pacific Economic Cooperation (VNCPEC) and a member of the National Financial and Monetary Policy Advisory Council. He is also Director of Institute for Brand and Competitiveness Strategy (BCSI). 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.</p> <p>Dr. Vo Tri Thanh mainly undertakes research and provides consultation on issues related to trade liberalization, international economic integration and macroeconomic policies. His other areas of interests include institutional reforms, financial system and economic development.</p>
 <p><b>Prof. Sachin CHATURVEDI</b></p> <p>Director General of RIS</p>	<p><b>Prof. Sachin CHATURVEDI</b> is currently Director General at the Research and Information System for Developing Countries (RIS), a New Delhi-based Think-Tank. He works on issues related to development economics, involving development finance, SDGs and South-South Cooperation, apart from trade, investment and innovation linkages with special focus on WTO. Currently he is Vice Chairman of Madhya Pradesh State Policy and Planning Commission and Vice Chairman, Atal Bihari Vajpayee Institute of Good Governance and Policy Analysis; and Member, Board of Governors, Reserve Bank of India. He was Global Justice Fellow at the MacMillan Center for International Affairs at Yale University; Developing Country Fellow at the University of Amsterdam (1996); Visiting Fellow at the Institute of Advanced Studies, Shimla (2003); and Visiting Scholar at the German Development Institute (2007). He has served as a Visiting Professor at the Jawaharlal Nehru University (JNU) and has been closely associated with the UN Food and Agricultural Organization, World Bank, UN-ESCAP, UNESCO, OECD and many other agencies.</p> <p>His book “The Logic of Sharing – Indian Approach to South-South Cooperation” has been acclaimed internationally as one of the best volumes on international development cooperation. Apart from this he has authored/edited 21 other books, apart from contributing several chapters in the edited volumes and publishing several research articles in prestigious journals.</p>





**Ms. Anita PRAKASH**

Senior Policy Advisor  
(International Economic  
Cooperation),  
Office of President of Economic  
Research Institute for ASEAN and  
East Asia (ERIA)

**Anita PRAKASH** is Senior Policy Advisor (International Economic Cooperation) in the Office of President of Economic Research Institute for ASEAN and East Asia (ERIA), Jakarta, Indonesia.

Her Key role at ERIA is policy research and policy development for leaders and senior officials of ASEAN, East Asia and Oceania, Europe and Africa. Her policy research covers international trade relations with special focus on trade and investment, GVCs and supply chain connectivity in Southeast Asia, East Asia, and between Asia-Europe and Asia-Africa. Her current research focus is on emerging economic architecture and supply chains in the Indo-Pacific.

She provides policy and research support for bilateral and multilateral processes between ASEAN and its Dialogue Partners, the Trade Ministers meetings in ASEAN, the East Asia Summit, the Asia-Europe Meeting, and the G20.

Prior to her work at ERIA, she served as Director in the Government of India in the Department of Commerce and NITI Aayog. She was a Visiting Research Associate at the Graduate Institute, Geneva from 2016 to 2019.

Her latest work in 2021 are the studies on 'GVCs and Investments: Changing Dynamics in Asia' and 'UK-ASEAN Trade: Strengthening the Supply Chain Linkages.' She is currently writing on 'Regional Integration and New Supply Chain Linkages in Indo-Pacific.

She is an alumni of Delhi University (M.Phil) and Australian National University (MBA).




**Dr. Man-Jung  
Mignonne CHAN**

Chief Strategy Officer (CSO),  
Forum on Humanities

**Dr. Mignonne Man-jung CHAN** has extensive experience in the academia, government, business, and media. She is Chief Strategy Officer (CSO) of the Forum on Humanities, a top-notch cross-strait bilateral business forum, as well as CSO of Healthy Asia, a region-wide company that flagships AI technology, medi-care management expertise, and comprehensive medical humanity. Furthermore, she sits in many Boards, including Independent Non-Executive Director of Standard Chartered Bank (Taiwan); Chinese Taipei PECC (Pacific Economic Cooperation Council) Committee; Executive Board Member of Association of Emerging Market Studies; of Indo-Pacific Policy Research Association; and of 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 the KMT Party think tank, National Policy Research Foundation; Chinese Taipei APEC Study Center at Taiwan Institute of Economic Research; and Advisor to the Chinese Cyan Geese Peace Education Foundation; the 21<sup>st</sup> Century Foundation. She is also Visiting Associated Professor for the MBA program and the International College of Innovation at the National Cheng-chi University in Taiwan. She is also Coach for a special inter-college negotiation program commissioned by the Ministry of Education.

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

	<p>serve as Research Associate at the Harvard University Negotiation Roundtable—a consortium organized by Schools of Law, Business, and Government.</p> <p><b>Education</b> Ph.D., Political Economy, Boston University, USA</p> <p><b>Research Fields</b> National Security, International Organizations, Global Governance, International Political Economy, Business &amp; Government Relations, Regional Economic Integration and cooperation, Global Business Environment, Cross-Taiwan-Strait Relations, Negotiation Theories &amp; Practices, and International Parliamentary Procedure.</p>
 <p><b>Dr. Yose Rizal DAMURI</b> Head of Department of Economics, Centre for Strategic and International Studies (CSIS)</p>	<p><b>Yose Rizal DAMURI</b> 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. He received his PhD in International Economics from the Graduate Institute of International Studies, Geneva, Switzerland. He is active in many networks of research institutes in East Asia, such as in Asia Pacific Research Network on Trade (ARTNet) and ERIA Research Institute Network (ERIA-RIN) and Think 20, the think tank network of G20 countries. Currently he serves as the Co-Chair of Indonesia National Committee of Pacific Economic Cooperation (INCPEC), while also serving as a Member of Governing Board of Economic Research Institute of ASEAN and East Asia (ERIA). Yose is also active in various policy forum in Indonesia, including as the Research Coordinator of Indonesia Service Dialogue, a forum dedicated for the development of services sector in Indonesia.</p> <ul style="list-style-type: none"> <li>• Head of the Department of Economics, Centre for Strategic and International Studies</li> <li>• Executive Co-chair of T20 Indonesia 2022 and Advisor to G20 Indonesia Committee</li> <li>• Member of Governing Board of Economic Research Institute of ASEAN and East Asia (ERIA)</li> <li>• Co-chair of Indonesia National Committee of Pacific Economic Council (INCPEC)</li> <li>• Founder of Indonesia Services Dialogue (ISD)</li> <li>• Founder of Indonesia Bureau of Economic Research (IBER)</li> </ul>



**Dr. Somkiat  
TANGKITVANICH**

President, Thailand Development  
Research Institute

**Dr. Somkiat TANGKITVANICH** obtained his PhD in Computer Science from Tokyo Institute of Technology. He has been recognized as a leading Thai expert in the areas of trade and investment policies, innovation policy, education policy and ICT policy. He was a main architect of Thai PBS, the first public television in Southeast Asia, and many media laws in Thailand. Under his leadership, TDRI was nominated “Person of the Year” in 2012 by the Bangkok Post.



**Amb. Murray  
McLEAN**

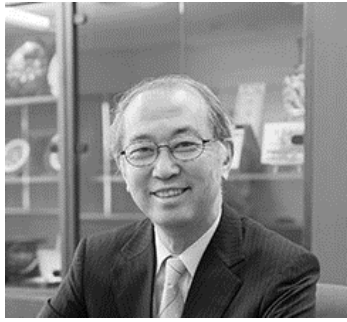
former Chairman of Dunmore  
McLean Pty Ltd

**Murray McLEAN** is Chair, Foundation of Australian and Japanese Studies (NPO); a Fellow of the Australian Institute for International Affairs (since 2018); and Chairman of his family company, Dunmore McLean Pty Ltd. He was Chair, Australia Japan Foundation (2012-2020); a Vice Chancellor’s Professorial Fellow at Monash University (2012-2015) and a non-resident Fellow at the Lowy Institute for International Policy (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). 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.



## Prof. Shujiro URATA

Professor Emeritus,  
Waseda University

**Shujiro URATA** is Professor Emeritus, Waseda University. He was Professor of International Economics, Graduate School Asia-Pacific Studies, Waseda University. He is currently Faculty Fellow at the Research Institute of Economy, Trade and Industry (RIETI), Specially Appointed Fellow at the Japanese Centre for Economic Research (JCER), Senior Research Advisor, Economic Research Institute for ASEAN and East Asia (ERIA), Visiting Fellow, Asian Development Bank Institute (ADBI) and Distinguished Senior Fellow at the Institute of Developing Economies (IDE-JETRO). Professor Urata received his BA in Economics from Keio University, MA and Ph.D. in Economics from Stanford University. 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 has published a number of books and articles on international economic issues. His recent books include *Achieving Inclusive Growth in the Asia Pacific*, co-editor, Australian National University Press, 2020, *Enhancing SME Participation in Global Value Chains*, editor, Asian Development Bank Institute, 2021, *The Effect of Globalisation on Firm and Labour Performance*, co-editor, Routledge, 2021, and *Globalization and Its Economic Consequences: Looking at APEC Economies*, co-editor. Routledge, 2021



## Prof. Simon SC TAY

Chairman,  
Singapore Institute of  
International Affairs

**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 challenges that matter to corporations and policy makers.



The SIIA is ranked by an international survey as the best independent think tank in Asia, and is a founder member of the influential "track-two" network of ASEAN think-tanks.


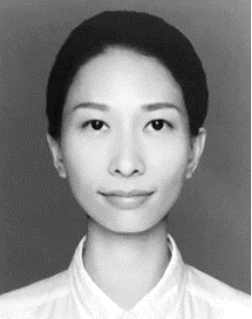
In addition to sharing insights with policy-makers in Singapore, the SIIA has also previously served as pro bono adviser to the Indonesian and Myanmar governments.

He is 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. Prof Tay's 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, CNBC, Bloomberg, the Straits Times, NHK Japan and CCTV.

Prof Tay has concurrently held a number of public appointments for Singapore, including as an independent Member of Parliament (1997-2001); Chairman of the National Environment Agency (2002-08) and an Expert and Eminent Person in the ASEAN Regional Forum (2002-2019). He also coordinated the country's equivalent of the Peace Corps (1990-93) and has served as co-chair for a number of public commissions such as Singapore 21, the Singapore Green Plan and the Singapore Concept Plan 2010. In 2006, Prof Tay received a National Day Award. Since 2020, Tay has been appointed an Ambassador for Singapore, currently accredited to Greece on a non-residential basis.

	<p>In addition to public service, Prof Tay has extensive experience in advising leading private sector corporations especially on political, economic and sustainability issues. He was Corporate Advisor to Temasek Holdings (2006-09) and has since served on boards for global companies including MUFG Bank of Japan, Toyota Japan, and Deutsche Boerse (Asia), LGT Bank of Liechtenstein, and Far East Group in Singapore. Since 2010, he serves as Senior Consultant at WongPartnership, a leading Asian law firm of some 300 lawyers and with offices in ASEAN, China and the Middle East.</p> <p>Prof Tay is also a prize winning author of fiction and poetry. His novel <i>City of Small Blessings</i> was awarded the 2010 Singapore Literature Prize. He graduated in law from the National University of Singapore (1986), where he was president of the student union for three terms. He also holds a Masters in Law from Harvard Law School (1993-94), which he attended on a Fulbright Scholarship and where he won the Laylin prize in international law.</p> <p>He was born in 1961 and is the only son of the late Tay Seow Huah, who was a senior civil servant in the government reporting to the Prime Minister and Defence Minister, and the late Madam Cheong Keong Hin, a teacher. Prof Tay has one son.</p>
 <p><b>Prof. Gary HAWKE</b> Emeritus Professor, Victoria University of Wellington (VUW)</p>	<p><b>Gary HAWKE</b> 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.</p>
 <p><b>Dr. Josef T. YAP</b> Senior Technical Advisor, ASEP-CELLs Project</p>	<p><b>Josef T. YAP</b> 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 and promoting energy security in the Philippines. 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 <i>The Philippine Economy: East Asia's Stray Cat? Structure, Finance and Adjustment</i> and <i>Lessons from Nationalist Struggle: The Life of Emmanuel Quiason Yap</i>. At</p>

	<p>present, Dr. Yap is Senior Technical Advisor to the ASEP-CELLs Project (Access to Sustainable Energy Program, Clean Energy Living Laboratories) which is being implemented under the auspices of the European Union and the Ateneo School of Government.</p>
 <p><b>Datuk Seri Jayasiri JAYASENA</b> former Secretary General, Ministry of International Trade and Industry</p>	<p><b>J.JAYASIRI</b> 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.</p> <p>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.</p> <p>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.</p>
 <p><b>Dr. HE Dongni</b> Vice President, China Institute for Reform and Development (CIRD)</p>	<p><b>HE Dongni</b>, Vice President and Associate Research Fellow of China Institute for Reform and Development (CIRD). She studied at Xiamen University, Nankai University, Maastricht School of Management in Netherlands and Northeastern University. She obtained a master's degree in economics, a master's degree in business administration, and a PhD. degree in management science and engineering. She participated in the completion of more than 30 national, provincial and ministerial-level projects, published more than 40 papers and reviews, she also participated in the research and compilation of <i>Annual Report on China Reform Studies</i> by CIRD, and published 8 monographs (as deputy Editor and chief editor). The projects she was responsible for including “Research on the Fiscal and Taxation System and Policy Options for the Expansion of Middle-Income Group in China”, “The Path Selection and Institutional Arrangements for the Openness of Hainan's Service Industry under the Background of International Tourism Island”, and “Research on the Sustainability of Hainan Provincial Local Debt Repayment and Construction of Investment and Financing Platform”, etc. She also participated in projects including “Structural Contradictions and Possible solutions in the Establishment of China-Europe FTA”, “The Transformation and Reform Towards Consumption-led Economy”, etc.</p>

## 6. 議事録

### (1) 日本語

以下の日本語サマリーは、共催団体である中国改革発展研究院（CIRD）及び当財団が作成した英文サマリーを当財団が和訳したものである。

### 2021年度日アジア太平洋フォーラム

ポストコロナにおけるアジア太平洋協力の過程：機会と見通し

2021年12月3日

#### 開会の辞

豊田 正和

はじめに参加者への歓迎の言葉を述べ、フォーラムの歴史、自身の役割、および以前の経験について簡単に述べた。また、CIRDと協力してこのアジア太平洋フォーラムを開催できたことについて、両団体とフォーラム自体が記念すべき年にあるということに触れ、嬉しく思うと述べた。続いて、フォーラムでここ数年にわたり議論したトピックを要約し、今回取り上げる2セッションの構成を提示した。第1セッションは「アジア太平洋の成長戦略」と題して、主にパンデミック後の回復に焦点を当て、第2セッションは「アジア太平洋の経済統合と貿易システム」とした。アジアはますます統合が進みつつあるが、まだ多くの課題があると述べた。また、アジアの多様性を指摘し、各国はその違いを尊重しながら、お互いのベストプラクティスから学ぶことができる、という自身の見解を述べた。本フォーラムは1日のみの開催で、新型コロナウイルスのためにオンライン開催になるが、建設的な結果につながる活発で実りの多い議論を期待していると述べた。

#### 開会の辞および基調講演

CHI Fulin 氏

#### 統合された地域市場のためにアジア太平洋経済協力を推進する

CIRDは、Zhang Yunling 教授の推薦と後押しにより、今年からアジア太平洋フォーラムに参加する運びとなった。本日は、国際経済交流財団と専門家の方々と協力して、ア



アジア太平洋地域における地域協力と持続可能な発展を促進するためのシンクタンク協力プラットフォームを目指していく。

2021年は、中国がAPECに参加してから30周年を迎える。11月12日のAPEC首脳会議での講演において、習近平首相は、「アジア太平洋協力の生命線は開放性である。私たちは、オープンな地域主義を掲げ、地域経済統合を推進する上でAPECビジョン2040の指導に従い、アジア太平洋自由貿易圏の早期実現に向けて努力しなくてはならない」と述べている。

かつてない世界の変化とCOVID-19の蔓延を背景に、アジア太平洋地域の経済は多くの共通の課題に直面している。協力を選ぶことは戦略的な選択であり、根本的な解決方法となる。

### 1. 統合された地域市場の構築を主要な目的として掲げる

アジア太平洋地域における長期的な成長の可能性を活かすために私たちが取るべき選択とは、統合された地域市場の構築を主要な目的として、アジア太平洋自由貿易圏の早期実現に向けて協力していくことだ。

近年、アジア太平洋地域は世界経済の成長を牽引する存在となっている。APEC加盟国は、2019年の世界GDP成長率の70%以上に貢献し、2000年の世界GDP成長率から約50%も上昇している。中国もまた、加盟国として、世界のGDP成長率の約30%を連続して貢献している。この期間中、地域全体のGDPは世界全体の55.9%から60.4%に増加した。

アジア太平洋自由貿易圏を推進するにあたり、私たちはユニラテラリズム、ナショナリズム、排他的地域主義といった課題だけではなく、地域経済の成長の多様化と、地域経済の回復の不確実性にも直面している。このような特殊な背景を踏まえて、私たちはアジア太平洋自由貿易圏を手段として、インフラの相互接続を保証し、地域の経済回復を促進することに基づき、地域統合市場の構築を目指すことで、アジア太平洋経済のオープンでバランスのとれた協調的かつ包括的な環境を推進する必要がある。

### 2. 規則、規制、標準、および管理プラクティスを調和させる

RCEPが来年から発効する予定であり、これはアジア太平洋地域における地域経済統合の歴史的な一歩となる。

同時に、FTAの開放にあたっては、地域内で断片化されたりレベルが異なったりしている点にも留意する必要がある。地域経済の貿易障壁は比較的高く、これが地域経済統合の遅れをもたらしており、地域における協力の可能性を最大限に活用することが困難となっている。

中国は環太平洋パートナーシップ協定への加盟を正式に申請したが、これは「規則、規制、標準、管理プラクティスにおける制度的開放の促進」をより高いレベルの開放のための手段として採用している。今私たちがやるべきことは、アジア太平洋経済協力のた

めによりレベルの高い経済・貿易規則をどのようにベンチマークするかを検討し、内部のロードマップや開始のためのタイムテーブルを準備するとともに、開発レベルの異なる国同士の利害調整をして、それぞれの競争優位性に基づき、アジア太平洋自由貿易圏の早期実現のための改革と開放を推進することである。さらに、三次化やデジタル化によって引き起こされたグローバル化の新たな特徴と傾向に直面したとき、アジア太平洋地域の経済は、オープンで包括的な地域政府の規則を策定する取り組みを行う必要がある。

### 3. 公衆衛生安全保障や高齢化社会などの分野において実践的な協力態勢を強化する

COVID-19 の蔓延と高齢化社会は、持続可能な成長に影響を与える重要な要因だ。

現在、パンデミックへの挑戦は依然として危機的状況にある。アジア太平洋地域の経済は、重要な物資の流通を促進し、COVID-19 に対抗する安全で信頼性の高い医療サプライチェーンを構築し、地域の公衆衛生の安全を確保するために、ウイルス検査や、ワクチン、医療用品、医療機器の研究開発における協力を強化する必要がある。

また、アジア太平洋地域では人口の高齢化と少子化が共通の課題となっている。2050 年までには、アジア太平洋地域の人口の 4 分の 1 が 60 歳を超え、2010 年の 3 倍になると推定されている。高齢化社会に対応するためには、アジア太平洋経済には政策交流と相互の学び合いが必要であり、看護、介護、高齢者施設、介護事業の開発など多くの分野で実践的な協力を行う必要がある。

### 4. シンクタンク、教育、および若い世代を優先にして、人と人との交流を深めていく

- シンクタンクの交流と協力を支援・促進し、情報提供というシンクタンクの独自の役割を活かし、世論に積極的に影響を与え、民間外交での対話を通じて効果的に立場を伝えていく。

- 教育分野の交流と協力を強化していく。特に観光、高齢者介護、医療における職業教育の機会創出と協力においては、専門課程、学位および職業資格の相互認識を促進する取り組みが必要だ。

- 若い世代のための様々な文化交流を行う。経済・貿易、学術、文化、環境保護におけるアジア太平洋若手リーダープログラムの開発と提供に向けて、共同して取り組むことができる。アジア太平洋フォーラムがアジア太平洋地域におけるシンクタンク協力の重要な基盤であることを理解した上で、私は、アジア太平洋地域のシンクタンク同盟を構築するための更なる努力を提案したい。

### 5. 海南自由貿易港をアジア太平洋経済協力のプラットフォームの一つとして利用する

海南自由貿易港は、アジア太平洋地域のハブとして地理的に有利な場所にあり、14 億人の消費者が集まる巨大市場への接続ポイントであるため、アジア太平洋地域にとって重要な経済協力プラットフォームとなる可能性がある。

海南自由貿易港では、観光、医療、海洋、デジタル産業を優先にして、工業団地やイノ

バージョンパークを設置することを提案したい。これらのパークは、主にアジア太平洋諸国の協力を目的としている。同時に、アジア太平洋地域の関連機関を誘致し、海南に事務所を設置し、ボアオ・アジア・フォーラムなどのプラットフォームを活用して、更なる交流と協力を図る必要がある。

今年は CIRD が 30 周年を迎える。アジア太平洋地域の経済統合を促進することは、CIRD の研究上の優先事項の 1 つだ。CIRD は、これまでも、日中韓協力ダイアログを継続的に共同で行ってきたが、それに加え、北東アジアフォーラムの北東部・地域協力の活性化、海南自由貿易港の国際フォーラム、東南アジア地域協力について、同盟国との連携を開始した。本日は、アジア太平洋フォーラムのシンクタンクと学者の方々に、地域協力の推進を目的とした CIRD の学術活動に参加していただき、心から光栄に思う。

## セッション 1：アジア太平洋の成長戦略

### モデレーター

フォーラムの進行を務めることを光栄に思っていること、またパネリストには事前に 4 つの議題を提示してあることを述べた。1 つ目の議題は、構造改革による貿易自由化促進の実現には高度な経済成長が必要であるとの自身の主張を踏まえ、パンデミックとワクチン接種運動が進行中であることを背景に、各国の経済成長に対する見解について。2 つ目の議題は、各関係国の成長にデジタル化が与えるプラスの影響について。3 つ目の議題は、グリーン成長のコストについて、4 つ目の議題は、経済構造改革を推進する上で、中小企業（特にスタートアップ企業）が果たす役割についてである。パネリストに 5 分間のプレゼンテーションを行うように促した。

### パネリスト A

中国は依然としてアジア太平洋地域の主要な推進力であり、中国経済は全般的に低迷しているものの、まだ予測からは外れていないと主張した。中国の政策の主なテーマは、より多くの分野を開放し、（特にデジタル経済）よりルール・ベース化することで、より開放的な国を作ることである。中国が環太平洋パートナーシップ協定に参加する申請を行っていることと挙げつつも、日本の政策に依存する部分が大きく、悲観的な見方を示した。

構造改革については、カーボン政策による影響が大きく、今年実施された多くの突発的な措置により問題が生じている。

グリーン開発は、各国が個別にアプローチするのではなく、協力によって行われるべきである。

また、バイデン政権のデカップリング政策に懸念を示した。

日本が強く支持しているインド太平洋における戦略的競争ベースの枠組みは、アジア太平洋における協力ベースの枠組みに対抗するものであり、不確実性を生み出してきた。これはアジア太平洋にとって課題となるが、これに対処する方法の一つは、競合するのではなく、地域的な包括的経済連携と環太平洋パートナーシップ協定をリンクさせることである。

中国には開かれた国をつくり、あらゆるルール・ベースのシステムに参加するという明確な方針がある。

## パネリスト B

韓国経済は一部の問題を除いて順調に進んでいると述べた。去年は景気が後退したにもかかわらず、今年には 4.3%程度の成長に回復するが、失業問題が深刻であり、若者の失業率は 10%になる。また、家計と政府の負債も急速に増加している。

アジア太平洋のマクロ経済問題については、継続的な新型コロナウイルスワクチン接種運動により成長の推進力となっているが、その持続性については疑問がある。コレクティブ・アクションにおいては、早期にワクチン接種を受けた高所得国とワクチン製造業者が、資金調達と技術移転を通じて短期間での地域ワクチン生産、および COVAX を支援する必要がある。パンデミックの終息は、すべての国がそれを克服した時にしか訪れないためである。

サプライチェーンの分断は国家主義と保護主義をもたらした。そのため、一部の国に依存するというリスクは、多様化により回復力を得ることで乗り越えなければならない。これについて、国境を越えた垂直的な海外直接投資を提案し、雇用創出のためにグリーンフィールドと M&A をサプライチェーンネットワークで奨励すべきだと述べた。

アジア太平洋経済は、国連気候変動会議の目標を達成するために、グリーン成長促進のための具体的な取り組みを強化すべきであり、カーボン・ニュートラルになることはリスクではなくチャンスと考えるべきである。

アジア太平洋の中小企業やスタートアップ企業は、イノベーションと製造のエコシステムの一部となる必要があり、アジア太平洋経済が地域連携を実現する中小企業オープン・ナレッジ・プラットフォームを構築するよう求めた。

まもなく制定される地域的な包括的経済連携（RCEP）を踏まえ、すでに制定されている環太平洋パートナーシップ協定（CPTPP）は、保護主義的な政策を回避するために、最も先進的で広範な、規則に基づく貿易・投資の枠組みとなるように拡大すべきである。最後に、APEC と G20 が、包括的な成長を確保するために自由貿易・投資制度を改善できるよう、より効果的かつ強固なものであるべきと主張し、アジア太平洋経済は、規則に基づく地域貿易・投資制度を支持すべきであると結論付けた。

## パネリスト C

イノベーションと製造業は新型コロナウイルスに対処できる可能性を示すものであると述べた。アジア地域のすべての国は、企業の発展、新規計画や戦略的計画を作成する中で、新型コロナウイルスに適応しようとしてきた。これは特にインドで顕著であり、第3四半期では4四半期連続の成長を達成し、拡大を続けている。インド経済は、7.8%の成長回復が見込まれ、来年には8.4%の成長が見込まれている。

インドでは、人口の82%が1回目の新型コロナウイルスワクチンを接種し、そして45%が2回目の接種をしたため、経済活動の孤立が増したことを述べた。同国は、周辺諸国やアフリカに1億9700万本のワクチンを輸出しており、相互協力により一層各国との関わり合いが深められる。

インド政府の対応も進化している。インドでは、GSTの徴収が増加し、輸出が回復しており、信用拡大がみられており、これら3つの要因が金融・財政政策に大きな影響を及ぼしている。

テクノロジーの重要性を指摘し、インドにおけるフィンテック関連の取り組みについて触れ、インドとシンガポールとの潜在的なフィンテック・コリドーを重要視した。続けて、アジア開発銀行（ADB）の中小企業モニタによれば、中小企業は家内工業の企業の99%、南アジアのGDPの33%を占めていることに言及した。これが中小零細企業の重要性を示しており、中小零細企業には焦点を当てる必要があると主張した。インドでは、信用力の確保に力を入れており、これは輸出が再び回復した理由でもある。政策調整に関しては、G20においてインドネシアがリーダーシップをとること、及び2023年にはインドがリーダーシップをとることが重要であることを示唆した。

## パネリスト D

はじめに新型コロナウイルスの状況について、ミャンマーのパンデミック後の見通しについて議論していく意向を述べた。ミャンマーのワクチン部分接種率は31.7%で、完全接種率は20%である。データによれば、新型コロナウイルスは制御されており、企業は契約に沿って機能を再開している。

ADBの予想による2020年の経済成長率は1.8%とされていたが、新型コロナウイルス、緊急事態宣言、およびビジネス部門に対する国際的な圧力によって成長率は低下した。国際労働機関（ILO）は、320万人が雇用を失ったと推定し、金融・銀行サービスへのアクセス困難、モビリティ低下、消費量、投資、貿易の減衰、業務中断、為替レートの不安定があると述べた。

現金主義的な金融システムを持つミャンマーでは、新型コロナウイルスによってデジタル化が促進された。同国の携帯電話加入者数は人口の1.5倍で、多くの人が2台以上の携帯電話を持っているが、インターネットにアクセスできるのは人口の半分にすぎない。ミャンマーには環境保全に関する法律が多くあるが、クリーン技術の点ではまだまだこ

れからというところだ。再生可能エネルギー、レジリエントでスマートな電力網、廃棄物管理システム、自動車や鉄道などの電気自動車など、多くの投資機会がある。ただし、人的資源、技術要件、天然資源管理には課題があると述べた。

ミャンマーの企業のうち 99%以上を中小零細企業が占め、GDP の 36%を占めている。インフォーマル経済が大きな課題となっており、法律が整備されているにもかかわらず、十分に施行されていない。中小零細企業が法律や規制を理解することが重要である。人的資源や能力の課題は依然として存在し、違法取引は中小企業の成長に大きな影響を与えているが、よりクリーンでデジタル化された未来に飛び出すチャンスはある。

パンデミック後の時代には、政治的な危機や制裁による課題は残るが、チャンスもあると指摘した。ミャンマーは苦境に立たされており、世界銀行が予測する 18%の景気後退を避けるためには、アジア太平洋地域の支援が必要である。

## パネリスト E

ベトナムの新型コロナウイルスパンデミックにおいて、経済を支える 3つの要因があると述べた。それは、新型コロナウイルスの制御方法、パンデミックへの対応と人と企業の支援に関する方針、および FTA の活用である。

ベトナムは、最初の 3 波発生の抑制に成功しているが、第 4 波で問題が生じ、経済成長が影響を受けた。現在では、ワクチン接種のペースが上がり、政策もウィズ・コロナへと方針を変えた。

社会、財政、金融は人々を支援する方向で検討され、特にインフラの面で投資ペースが上昇している。しかし、GDP 面では対策の規模が他国よりも小さく、金融政策を中心としている。ベトナムは昨年も成長を続けたが、今年は多くのエリアで回復を見せる協同国に遅れを取った。来年の経済成長率は 6.5%になることを期待している。

ベトナム政府は、今後 2 年間、GDP の規模が拡大するための新たな回復計画を策定しており、これに伴い構造改革と制度改革を継続していく。ベトナムは、マクロ経済の回復力、民間セクターの開発、統合面での優位性の活用に注力していく。

ベトナムはハノイ、ホーチミン、ダナンのイノベーションセンターでイノベーションやスタートアップ企業を推進しており、数年後にはホーチミン市などに金融センターを設立する試みがあると述べた。

## モデレーター

モデレーターはパネリストに感謝の意を表し、続いて討論者からの 5 つの発表についてのコメントに移ると述べた。

## 討論者 A

東アジア・アセアン経済研究センター (ERIA) が行っている研究の観点から、今後数年

間のいくつかの指標に注目した。我々の懸念はアジアとアジア太平洋での発展が中心である。

発展中のアジアには流動性注入が困難になっており、成長戦略の実施が難しく、それは今後も引き続き懸念される。

人の移動が限られているため、東南アジアではサービス分野における特有の問題が生じている。この危機の中で貿易は平均的な水準を維持しているが、所得はより大きなマイナスの影響を受けているため、財・サービスの需要の再構築は重要である。成長戦略は包括的で、仕事の未来全体を検討する必要がある。パンデミック後の世界での成長のための新しい戦略と展望が必要だ。

グローバルな視点から見ると、アジアのサプライチェーンは貿易の緊張と世界的パンデミックに強く、これまでのところは回復力があつた。同時に、インド太平洋の経済構造の再編も行われている。米国と EU は重要な貢献者となることを約束しているが、インド太平洋経済構造における新しい経済的関係を定義するのはアジアそのものであると考えられる。

G20 がグローバル・サウスに進出することで、より包括的になり、発展途上経済の懸念を考慮に入れることができるだろうか。もしそれが実現し、パンデミックからの回復のメカニズムが含まれるのなら、G20 は多国間主義の将来を示す重要な指標になる可能性がある。

## 討論者 B

新型コロナウイルスパンデミックは、私たちの仕事のペース、そして特に生産と消費の様式、世界における私たちの役割、外部環境との関係、内的な自己など、発展の意味を振り返る機会を与えてくれた。それは、文明を進めてきた私たちの努力に値する価値があるものだった。

台湾のビジネスコミュニティは最近、環境と社会的ガバナンスについて議論し、GDP を超えた問題や株主の優位性を超えた問題について議論している。これらに代わって注目すべきは、気候変動、カーボン・フットプリント、カーボン・ニュートラル、ネットゼロ、グリーン・クレジット、 サプライチェーンのグリーン化である。

## 討論者 C

ここで、2つの重要な課題に注目する必要がある。デジタル・トランスフォーメーションのメリットを最適化し、いかに悪影響を軽減するか、そして環境に配慮した持続可能な経済へ効率的かつ効果的に移行するかだ。これらは、インドネシアが来年 G20 で取り組む3つの優先事項のうちの2つであり、もう1つは世界的な保健システムの強化である。

インドネシアは、デジタル・トランスフォーメーションとグリーン経済への移行に取り



組んでいきたいと考えているが、課題は多い。インドネシアは、この4ヶ月間で多くの状況が改善しているが、依然としてパンデミック問題に対処し、景気回復に力を入れる必要がある。インドネシアでは新型コロナウイルスの拡大はほぼ抑えられており、経済は急速に成長しているが、デジタル経済の面では急速な進展を遂げようと奮闘しているところである。インドネシアには、デジタルテクノロジーの利点を最大限に活用するために、より優れたデジタル接続だけでなく、規制や枠組みが必要である。

グリーン経済に移行するためには、インドネシアをはじめとするアジア太平洋諸国のほとんどの国が、まだ多くの投資と資金調達を必要としている。さらに、環境に配慮した経済への移行には、大きなパラダイムシフトと既存の経済機関の大幅な変化が必要である。私は、グローバルコミュニティの支援とアジア太平洋諸国とのさらなる協力があれば、インドネシアやアジア太平洋地域のその他の途上国がこれを達成できると楽観視している。

#### 討論者 D

ここでは、2つの主なポイントについて話す。

第1のポイントは、アジア諸国は、セクター間のバランスを取るのではなく、経済発展モデルを見直す必要があるということである。例えば、タイの場合、製造業と農産物のバランスが取れているだけでなく、観光業も非常に盛んであると考えられてきた。しかし、新型コロナウイルスパンデミックが起こったとき、観光業は停止し、これが多くのタイ人に経済的な困難をもたらした。経済はよりバランスの取れたポートフォリオを持ち、より包括的で環境に優しいものである必要がある。

第2のポイントは、コロナ後の世界に向けて、新しい開発目標があるということである。これまでは主に効率化に重点を置いており、ジャストインタイムの生産を行っていた。しかし、将来的には、効率性と成長だけでなく、リスク管理のためにも、複数の開発目標を設定する必要がある。ジャストインタイムだけでなく、不測の事態に備えたジャストインケースでも対応していく。また、パンデミック対応により、家計、企業部門、政府が大きな財政負担を負うため、発展に新たな制約が生じる。我々は、より回復力を高めるだけでなく、リソースの使用に関しても効率的になる必要がある。デジタル化は、これを実現するためのツールとなりうる。

#### モデレーター

モデレーターは討論者の発表に感謝の意を述べた。

また、まずは各国がパンデミック問題にうまく対処していること、依然として不確実性はあるものの、経済は最も深刻な局面は乗り越えたことを嬉しく思うと述べた。そして、デジタル経済の重要性は、改革、自由化、協力の余地をもたらす成長の原動力であると言及した。これは成長の原動力でもあり、そのために好循環が形成される。

続いては、聴講者の参加による討論へと進んだ。

## ディスカッション

### 討論者 C

まず、デジタル・トランスフォーメーションについて述べる。これは私たちの経済の未来となることは確かであり、経済成長と経済発展に多くの利益をもたらすだろう。デジタル経済をサポートするためには、接続性の問題や国内規制の枠組みだけでなく、デジタル経済における国際的な取り決めの作成など、多くのことを行う必要がある。このデジタル・トランスフォーメーションによって、国内経済だけでなく国境を越えた取引のあり方がすでに変革されているためである。地域レベルでは、より協力的なルールと取り決めも必要である。アジア太平洋諸国は、このような行動を加速する必要があると思う。

### モデレーター

これは重要なポイントである。我々には、データフロー、eコマースなどのルールも必要である。これについて他に意見はあるだろうか。

### 討論者 D

コロナ後の世界において、デジタル化は回復と新たな成長のために非常に重要であると考えている。しかし、他の国でもそうだろうが、タイでの障害となるのは政府だ。デジタルでの政府のサービスは非常に重要である。民間セクターはすでにビジネスモデルを急速に変革しており、人々はどこからでも仕事を行うことができる。取引はオンラインで行うことができるが、政府が関与すると常に問題が発生する。

政府の法律や規則には非常に多くの時代遅れな問題があり、デジタル経済に移行するためには、アップグレードが必要である。

### 参加者 A

デジタル経済を推進するという考えを支持しているが、デジタル経済やデジタル化の負の影響についても言及したい。一つは、失業の可能性である。ご存知のように、デジタル化によって労働需要が減少し、失業につながる可能性がある。失業が想定される場合の労働市場の対応を知りたいと思う。これは労働市場の規則に関連しており、労働市場が柔軟であれば失業給付を削減することができる。そこで、各国の労働市場の状況をパネリストに伺いたい。デジタル化によって発生する可能性のある失業に対処する準備はできているのだろうか。

## パネリスト B

韓国では、全セクターでデジタル化の下地が十分に発達している。多くの工場やサービスプロバイダーがデジタル化プログラムを導入し始めたとき、特に中小企業では多くの人々が失業していることがわかった。工場が閉鎖されている間は中小企業で働く人々はいずれにしても仕事をしていないため、現在のパンデミックに対処するために直接補助金を与えるのではなく、包括的なデジタルトレーニングプログラムのための参加券を政府が提供することを提案した。このように、初期段階で個人事業主のためにデジタル化を促進するというのも、できることのひとつである。しかし、そのような個人事業主を超える多くの業種や企業がデジタル化を導入し始めている。

そのため、韓国教育システムは現在、デジタルコースや AI コースなど、小学校から中学校、高校、さらには大学までの主要な必須コースの作成を試みている。教育システム全体を通じてデジタルトレーニングプログラムを構築する必要があると思う。

これは我が国の議題だが、国内で苦闘している中小企業のためには、デジタル・オープン・e コマース・プラットフォームにおいて、アジア太平洋全体で合意する必要があることを強調したい。これは、地域全体の取り組みであるべきである。

## モデレーター

デジタル化のマイナス面についてコメントはあるだろうか。

## 討論者 A

デジタル経済では労働力は代替可能だが、この代替の可能性は正確に計算されていない。現時点で、特にデジタル経済が台頭している国では、労働力の代替に関する政策を確立することが政府にとっての大きな課題となっている。代替の可能性の程度はまだほとんどわからないため、政策的観点からは大きな課題となる。

しかし、デジタル経済とデジタル化により、熟練労働者の生産性が向上する一方で、スキルのない労働者やスキルの低い労働者の参加は減少する可能性がある。デジタル経済で製造業がなくなるわけではないので、製造業の性質は変化するかもしれないが、スキルの低い労働者は引き続き必要である。そしていずれの国も多かれ少なかれ、製造業への投資とデジタル経済への投資、どちらをどの程度行うかという同じ振出に戻るようになる。そのバランスを取ることは、アジアのほとんどの発展途上国にとって最優先課題である。

## パネリスト A

デジタル化は、今後の大きなトレンドだと思う。中国では、広く深い範囲で、非常に急速に発展している。対象範囲は、生産、商業活動、人々の生活、金融、そして文化など、ほとんどすべてであり、今後さらに発展していくと思われる。

中国での大きな影響の一つは、農村地域と都市部間の従来の格差を克服する可能性となる、農村地域のつながりである。これにより、農村地域が販売、生産、技術などにおいてこのデジタル化のフレームワークに参加することができるようになる。これは主に従来の商売に損害を与えるので、再調整しなければならない。また、政府税制や人々の生活も調整しなければならない。中小企業にとっては、チャンスであり課題でもあるが、従来のビジネス手法にとっては脅威ともいえる課題のため、調整が必要だと思う。場合によっては、非常に大きなコストを要する。しかし、先に述べたとおり、技術開発のスピードによるこのトレンドを、私たちは受け入れなければならない。

### 参加者 B

デジタル化を推進しなければならない一方で、デジタル化のマイナス面がいくつかあり、それを克服しなければならないのは興味深い。クリーンエネルギー推進のマイナス面についてはどのように考えるだろうか。また、どのように克服できるだろうか。

### モデレーター

先に、すべての質問を受け付ける。

### 参加者 C

コメントと質問がある。デジタル経済とデジタル化については、検討すべき4つの課題を提起したい。

最初の課題は規制の枠組みである。デジタル経済に対して、規則に基づくアプローチが重要であるという点には、完全に同意する。中国は近年、デジタル経済の急速な発展を遂げてきたが、もちろんその一方で、対処すべき重要な課題もいくつかあった。1つ目はデータセキュリティ、2つ目は大企業側に包括的かつ非差別的な政策、3つ目は弱者の保護である。中国はP2Pオンラインクレジットやオンラインローンのために、多くの弱者が資産を失ってしまっているからだ。そして4つ目は、独占を規制してこのような有望なイノベーションとのバランスを取る方法である。デジタル経済の発展の初期段階では、スタートアップ企業やさまざまなテクノロジー企業が発展するために十分な自由があるべきだが、これらの大企業が業界で独占的になる傾向は防ぐ必要がある。

2つ目の課題はインフラである。デジタル経済の発展は、インフラに大きく依存している。中国は、ブロードバンドと携帯電話の料金の安さから多くのメリットを得ている。これは、特に5Gテクノロジーの導入が、ICTテクノロジーを利用するための基本的なインフラとなるためだ。これはデジタル経済の発展をさらに大きく推進するものとなるだろう。5Gはおそらく韓国では成功を収めており、中国もそれに追いつこうとしている。

3つ目の課題は物流である。eコマースを利用するには、効率的で効果的、かつコスト

効率の高い物流が必要である。

4つ目の課題は、資本の流れである。国境を越えた資本の流れや取引を規制する方法を検討する必要がある。また、地域経済の課税面で各国の政策をどのように調整していくかということも、これに関連する課題である。

他国のインフラと規制の枠組みについてぜひ知りたいと思う。デジタル経済はまだ発展の初期段階にあるため、アジア太平洋地域の規制の枠組み全体を考慮して、この地域のデジタル経済の発展が確実に利益をもたらすように、多くの効果的な議論を行う必要がある。

#### **パネリスト D**

デジタル化のマイナス面についての発言について、コメントする。ミャンマーは後発開発途上国 (LDC) である。人口の 67%は農村地域に居住しており、教育が十分ではない。このような人々には仕事が必要で、デジタル化のような事について学ぶ能力は持っていない。

ミャンマーは LDC のため、貿易やサービスの点ではデジタル化はうまくいく。しかし、デジタル問題に関しては周辺諸国が高いレベルの優位性を有しているため、地域のエコシステムはより成長する必要がある。しかし、製造業では、中小零細企業の 60%は食品産業だ。彼らは投資できるほどの資金や技術を持っておらず、まだ現場労働者を使用している。ミャンマーにとってデジタル化は良い面もいくつかあるが、失業率は多く、人口の半数、農村部の若い女性は半数以上であるため、現場労働はまだ必要である。デジタル化は良いが、これだけに焦点を絞ることはできない。投資、技術、能力、これらすべてが依然として国にとって大きな課題であり、農村地域出身の人々、農村地域に移住したいと考える人々には、雇用を提供する必要がある。

#### **パネリスト B**

デジタル化について、いくつかコメントしたいと思う。パンデミックがデジタル化を加速させている一方で、特に韓国ではデジタル格差が生まれている。マイクロビジネスはまだデジタル化の初期段階にあるため、マイクロビジネスを確実にデジタル化していく方法について注意しなければならない。2つ目の課題は、デジタル化による労働の代替性である。韓国では、未開拓の産業、特に配送サービスが急増したことに驚いた。デジタル化は、経済のデジタル化を進めながら、新たな雇用機会を創出することもできると思う。

#### **パネリスト E**

私の見解は3つある。まず、ベトナムで新型コロナウイルスが流行する前は、デジタル化によって人々がビジネスにさまざまなプラットフォームを使用し、数百万人の雇用を

創出できたため、失業の圧力よりも多くの雇用が創出された。新型コロナウイルスが流行してから、企業は接触型から非接触型にビジネスのやり方を変えたため、デジタル化によって失業の圧力が生じた。全体的に見て、企業が事業を継続できたという点でプラスの貢献となった。

次に、インフォーマルセクターは問題である。私たちは人々に社会的支援を提供しようとしたが、実際にはインフォーマルセクターの従業員とつながることは困難だった。ASEAN とアジアは社会保障制度に重点を置くべきであり、デジタル化はそれを助けることができると思う。

最後に、新エネルギー産業である。ベトナムは太陽エネルギーと風力エネルギーの開発に強みを持っているが、問題が2つある。1つ目は政策である。テクノロジーは急速に変化するため、その変化に対して適切な政策を維持することができない。2つ目は、太陽光、風力、新エネルギーの開発には、発電量に適した送電線システムが必要なため、非常に体系的なアプローチが必要なことである。

#### モデレーター

活発な議論に感謝したい。特に、パネリストや討論者の方々に、議論に役立つ優れた資料を提供していただいたことに感謝する。

結論を出す前に、グローバル・サプライチェーンの回復力を促進または強化するためには、何らかの規則に基づく貿易・投資体制が必要であることには、全員が同意のようだ。

また、デジタル化とグリーン成長のための重要な政策決定には、何らかのエビデンスに基づく政策立案プロセスを適用する必要があると付け加えたい。

## セッション2：アジア太平洋の経済統合と貿易システム

### パネリスト A

近年世界が経済成長に向けて大きな課題に直面していると述べた。この状況に対処するために重要なことは、第一に、市場をできる限り自由かつ公正に運営できるようにし、多国間合意された規則を遵守することである。第二に、APEC や ASEAN などの長年にわたる協議機関を用いて、中小国が多国間における懸念を提起できるようにすることがこれまで以上に重要である。第三に、環太平洋パートナーシップ協定と地域的な包括的経済連携で設定された高い基準を、加盟国が遵守することも重要である。特に、これらの協定に追加の加盟国が承認される場合には重要である。第四に、環太平洋パートナーシップ協定と地域的な包括的経済連携には WTO にはない新しい規定が含まれているが、デジタル経済の急速な変化を反映し、管理するための規定をさらに策定する必要が

ある。第五に、アジア太平洋の平和と安定の継続は、経済の繁栄を継続する上で極めて重要である。

### パネリスト B

持続可能で回復力があり、包括的でダイナミックな経済成長を達成するために考慮すべき問題は数多くあると述べた。最も重要な要素の一つは、自由でオープンかつ透明性のある規則に基づく経済・ビジネス環境を構築し、管理することであり、これにより物品、サービス、データと情報、および人材の国際・地域的な移動を促進し、グローバルバリューチェーンの拡大、強化、多様化に貢献することである。途上国にとっては、先進国の経済協力・援助が必要であると考え。先進国では、一時的な所得補償、人材育成（教育・訓練、デジタル技術）、途上国と同様に自国の中小企業の発展など、経済支援（貿易調整支援）を行うことが求められている。

### パネリスト C

パンデミック下で急増し、将来性のあるデジタル化の分野では、より多くの規則が必要であると述べた。たとえば、他の協力国との間でデジタル経済契約（DEA）に署名することは、問題への対処に役立ち、今後の草分けとなる可能性がある。次に、持続可能性と炭素である。気候変動対策への関心とコミットメントの高まりから、経済的、貿易的な問題が生じている。また、EU が提案した炭素国境調整措置（CBAM）や、アジア以外の貿易相手国が設定したその他のカーボン・リーケージ政策の影響についても懸念がある。同時に、協力の機会が生まれ、グリーン経済協定も草分け的取り組みとなっている。最後に、二国間取り組みである。EU や中南米の太平洋同盟などの他の地域との経済関係は重要である。これ自体も重要だが、米中対立においても重要である。この点では、後に ASEAN 全体の協定に拡大された 2000 年代初めの二国間の FTA のようなものが見られた。これが進行すると、より多くの協力国に開放され、経済貿易協定や投資協定に統合される可能性がある。

### 討論者 A

「規則ベース」をあまり検討せずに採択すべきではない。「規則ベース」は、単一で不変のルールと解釈すべきではない。既存の規則に挑み続ける革新と、変化を常に求めていく必要がある。経済協力の分野で規則を制定、実施する国際的な権限機関はない。規則が「法的拘束力がある」といえるのは、それを破ることで恥をかく場合であり、ほとんどコストを伴わない。国際的な制度に有効な規則を課すことのできる経済組織などない。国際規則は、交渉の上、合意される必要がある。テクノロジーやその他の変化に直面すれば、必然的に不十分であることが証明されるだろう。したがって、規則の維持は、その策定と同様に、交渉と合意を中心としなければならない。「規則ベース」は、「国間

の関係性により成り立つ」と理解する必要がある。

### 討論者 B

デジタル化の分野では、いくつかの重要な課題に対処する必要がある。1つ目は規則に基づく競争である。2つ目は雇用保障と雇用保護である。3つ目は、データアクセス、プライバシー、セキュリティの問題についても、私たちはもっと注意を払うべきである。一方、国境を越えた問題や課題への対応を強化するためには、地域連携を強化する必要がある。

### 討論者 C

中小企業の取り決めなど、ソフト面のアプローチが必要である。デジタル化は地域を分断する可能性があるが、経済活動を促進することもできる。各地域はそれぞれに繋がりがあがあるため、デジタル化、連携、協力を進めることは重要である。3つ目の中小企業については、この地域のすべての国が中小企業に大きく依存しているにもかかわらず、中小企業への統合アプローチはほとんどない。環太平洋パートナーシップ協定には中小企業に関する章があり、中小企業がレジリエンスを得るためには、合併整理を行い、中小企業の真の連携を行う必要がある。中小企業を地域の経済統合を促進するツールにするのです。

### ディスカッション

1. 中小企業の問題について議論したいが、すべてのコメントに同意する。次に、政治問題では、私は日本で中小企業政策を策定した経験があるが、すべての政党が中小企業を支援している。中小企業の政治的な影響力から、日本企業の99%は中小企業であり、従業員の70%は中小企業で働いているため、中小企業を支援すると票が集まる。必要なのは、経済目標を達成するための中小企業の競争力を高めることだと思う。
2. 一つ質問したいことがある。最初のセッションでは、私は環太平洋パートナーシップ協定の加盟国拡大が重要であると示したが、既存の加盟国がどの国を承認または拒否するかを決めるための加盟条件は何か。既存の加盟国が、加盟を希望する国にアクセスできることは知っているか。
3. デジタル経済がどのように異なるのか、私が言及したアイデアについてオープンにしておかなければならないと思うか。私たちは、この問題を既存の貿易の流れに統合する方法を検討しているが、デジタル経済についてはこれまでほとんど例がない。デジタル化は注目に値する新しい要素であり、経済統合にとっても非常に重要であると思う。これについては、米国の取り組みを知りたいと思うが、投資、デジタル、その他の協力要



素について、オープンな議論をすべきかどうかは分からない。

## 閉会の辞

### 豊田 正和

モデレーターおよび議論の参加者に謝意を表した。そして、最初のセッションでデジタル化のマイナス面について聞くのは興味深かったが、それでもこの重要な動きを止めるべきではないと述べた。

最後に、今日の洞察力に富んだ議論に謝意を表した。

**結びの言葉 A：** 専門家の講話からは多くのプラスの意見が見られたが、当然問題もある。基調講演では、アジア太平洋自由貿易地域の確立を加速化することが、非常に重要な柱であり、進むべき道の選択であることが示唆されたと考えている。また、オープンなアジア太平洋経済を推進するためには、高レベルの開放性を推進するとともに、いかに低所得国、途上国、低所得層、中小企業などを取り込むかについて検討が必要である。最後に、アジア太平洋フォーラムがこれらの重要なトピックで引き続き重要な役割を果たすことを期待していると述べた。

**結びの言葉 B：** 議論では、マイナス面について聞いたことは興味深かったが、そのようなマイナス面によって重要な動きを止めるべきではない。最も重要なことは、こうしたマイナス面を克服し、デジタル化やグリーンエネルギーなどの利点を最大限に活用する方法である。また、アジア太平洋地域ではお互いに学ぶことが重要である。第2セッションでは、規則に基づく競争が非常に重要であることに誰もが同意しているが、自由化を進めるためにはまだいくつかの限界がある。ソフトアプローチが重要であるかもしれないし、ASEAN 諸国だけでなく、アジア太平洋地域は、世界経済のために協力する必要がある。

(2) 英語

English Summary drafted by CIRD and JEF

## **Asia-Pacific Forum 2021**

“Process of Asia Pacific Cooperation in the Post Pandemic Era:  
Opportunities and Prospects”

### **Opening Remarks**

#### **Mr. Masakazu TOYODA**

The speaker welcomes the participants, and talks briefly about the history of the forum, his role, and his previous experience. He notes that he is pleased to be able to hold this Asia-Pacific Forum in cooperation with CIRD, given that both organizations as well as the forum itself are celebrating anniversaries. He subsequently recaps the topics that the forum has discussed in the preceding few years before setting out the two-session format that the event will take, the first session being entitled “Growth Strategy of Asia-Pacific” and focusing mainly on a post-pandemic recovery, with the second session being entitled “Economic Integration and Trade System of Asia-Pacific”. The speaker says that although Asia is becoming increasingly integrated, there are still many challenges. He notes the diversity of Asia and his view that it is possible for countries to learn from each other’s best practice while respecting their differences. The speaker explains that while the forum will last only for one day and be online due to Covid-19, he anticipates a lively and fruitful discussion leading to a constructive outcome.

### **Opening Remarks and Keynote Speech**

#### **Mr. CHI Fulin**

#### **Promote Asia-Pacific economic cooperation for an integrated regional market**

Recommended and facilitated by Prof. Zhang Yunling, CIRD started to participate in the Asia-Pacific Forum from this year on. With Japan Economic Foundation and the experts here today, we will work together for this think tank cooperation platform to promote regional cooperation and sustainable development in Asia-Pacific.

2021 marks the 30<sup>th</sup> anniversary of China’s participation in APEC. In his remarks at 28th APEC Economic Leaders' Meeting on November 12<sup>th</sup>, president Xi Jinping said, “Openness is the lifeline of Asia-Pacific cooperation. We need to uphold open regionalism, follow the guidance of the APEC Vision 2040 in advancing regional

economic integration, and work for the early realization of a high-standard Free Trade Area of the Asia-Pacific (FTAAP).”

Against the background of unprecedented global changes and the covid-19 pandemic, economies at Asia-Pacific region are facing many common challenges. Choosing cooperation is a strategic choice and the fundamental way out.

### **1. Take building up an integrated regional market as a key objective.**

To tap the potential of long-term growth in the Asia-Pacific region, the choice of route would be working together for the early realization of FTAAP by building up an integrated regional market as a major objective.

In recent years, Asia-Pacific region has become the major driver for world economic growth. APEC member states contributed more than 70% of the world GDP growth in 2019, rising from around 50% in 2000. As a member state, China has contributed around 30% of the global GDP growth for a number of consecutive years. During this period, the total GDP of the region has been increased from 55.9% to 60.4% of the global total.

To promote FTAAP, we are facing not only challenges of unilateralism, nationalism and exclusive regionalism, but also diverging growth of regional economies and uncertainty of regional economic recovery. Against such a special background, we need to promote an open, balanced, coordinated and inclusive Asia-Pacific economic landscape, by aiming at building an integrated regional market, with FTAAP as an instrument, with enhanced interconnection of infrastructure as a guarantee and on the basis of promoting full economic recovery of the region.

### **2. Initiate the harmonization of rules, regulations, standards and management practices.**

RECP is to take effect from next year, and this is a historic breakthrough for the regional economic integration in Asia-Pacific.

At the same time, we need to be aware that there have been fragmentation and different levels in opening for FTAs in the region. Trade barriers of regional economies remain comparatively high, leading to the lag of the regional economic integration and making it difficult to maximize the utilization of cooperation potentials in the region.

China has formally applied to join CPTPP, and it takes “promoting institutional opening in rules, regulations, standards and management practices” as a major measure for higher level of opening-up. Now we need to study how to benchmark high-level economic and trade rules for Asia-Pacific economic cooperation, to prepare

internal roadmaps and timetables for opening-up efforts, we shall also try to coordinate the interests among countries with different development levels, and promote reform and opening-up accordingly, based on our respective competitive advantages, for early realization of FTAAP. What's more, when faced with new features and new trends for the tertiarization- and digitalization- driven globalization, economies in Asia Pacific region need to take the initiative to develop open and inclusive regional government rules.

### **3. Enhance practical cooperation in such areas as public health security and population ageing.**

Covid-19 pandemic and population ageing are important variables that affect sustainable growth.

Currently, the challenge of pandemic remains critical. Economies in Asia-Pacific need to enhance cooperation in virus testing, as well as R&D in vaccines, medical supplies and medical equipment, in order to promote circulation of critical supplies, to build up a secure and reliable medical supply chain to fight covid-19, and to ensure regional public health security.

In addition, population ageing and low fertility have become common challenges for the Asia-Pacific region. It is estimated that by 2050, a quarter of the population in the Asia-Pacific region will be over 60 years old, which is three times the number in 2010. To address population aging, the Asia-Pacific economies need policy exchanges and mutual learning, and should carry out practical cooperation in many fields such as nursing, elderly care, introducing ageing facilities, and developing elderly care industries.

### **4. Deepen people-to-people exchange with that of think tanks, education and youth as priorities.**

- Support and facilitate more think tank exchange and cooperation, utilize the unique role of think tanks in offering intellectual support, positively influencing public opinions, and effectively communicating positions through track II dialogues.
- Enhance exchange and cooperation in education, especially in the opening and cooperation of vocational education in tourism, elderly care and health care, efforts should be made to promote mutual recognition of diplomas, degrees and professional qualifications.
- Carry out various cultural exchange for youth. Joint efforts could be made to develop and offer Asia-Pacific Young Leaders Program in economy & trade, academia, culture and environmental protection. I understand that Asia-Pacific Forum is an

important platform for think tank cooperation in the region, and I would like to suggest further efforts could be made to establish a think tank alliance for the Asia-Pacific.

#### **5. Take Hainan Free Trade Port as one of the platforms for Asia-Pacific economic cooperation.**

Hainan Free Trade Port could be an important economic cooperation platform for the Asia-Pacific region, as it has a favorable geographical location as a hub in the region, and it is a connecting point to a huge market of 1.4 billion consumers.

I would like to suggest to set up industrial parks and innovation parks, with tourism, medical care, marine and digital industries as the priority, at Hainan Free Trade Port. These parks will mainly be aiming at cooperation among Asia-Pacific economies. At the same time, we need to attract relevant Asia-Pacific institutions to set up offices in Hainan, making joint efforts to utilize platforms like Boao Forum for Asia to further exchange and cooperation.

This year marks the 30<sup>th</sup> anniversary of CIRD. Promoting regional economic integration of the Asia-Pacific has been one of CIRD's research priorities. CIRD has been continuously co-organize CJK Cooperation Dialogue with its counterparts, it also initiated Revitalizing Northeast and Regional Cooperation of Northeast Asia Forum, international forum of Hainan Free Trade Port and Regional Cooperation with Southeast Asia with its partners. Hereby, we welcome think tanks and scholars of this Asia-Pacific Forum to participate CIRD's academic activities, which aim to promote regional cooperation.

### **Session 1: Growth Strategy of Asia-Pacific**

#### **Moderator**

The moderator states that he is always honored to moderate the forum, and says that he distributed four questions to the panelists in advance. The first question concerns the panelists' views on economic growth in their own country against the backdrop of the ongoing pandemic and vaccination campaigns, given his assertion that a high level of economic growth is required to achieve structural reform encourage trade liberalization. The second question concerns the positive impact of digitalization on growth in each of the relevant countries. The third question concerns the cost of green growth, and the fourth question concerns the role that SMEs, especially startups, play in promoting structural economic reform. The speaker goes on to invite the panelists to give their 5-minute presentations.

### **Panelist A**

The panelist asserts that China is still the main driving force in the Asia-Pacific area, and while there is a general downturn in the Chinese economy, it is still on course to meet projections. The main theme of policy in China is to make the country more open by opening more sectors and becoming more rule-based (especially in terms of the digital economy.) The panelist points to China's application to join the CPTPP, but expresses pessimism, stating that a lot depends on Japan's policy.

In terms of restructuring, the main effect is from carbon policy, and the many sudden actions taken this year have caused problems. Green development should take place through cooperation rather than each country approaching it individually.

The panelist expresses concern at the Biden administration's policy of decoupling. The strategic competition-based framework in the Indo-Pacific, strongly supported by Japan, challenges the cooperation-based framework in the Asia Pacific, and this has created uncertainty. This presents a challenge to the Asia-Pacific, but one way to deal with this would be to link the RCEP and CPTPP rather than compete.

China has a clear policy: continue to open the country and join any kind of rule-based system.

### **Panelist B**

The panelist states that the Korean economy is doing well, except for a few problems. Despite a contraction in the previous year, this year the economy will bounce back to around 4.3% growth, but there is a serious unemployment problem, with youth unemployment standing at 10%. Household and government debt is also rising quickly.

Concerning macroeconomic issues in the Asia-Pacific, ongoing Covid-19 vaccination campaigns have provided growth momentum, but there are questions over its durability. In terms of collective action, early-vaccinated high-income countries and vaccine manufacturers should support regional vaccine production in the near-term and COVAX through financing and technology transfer as the pandemic will only end when all countries have overcome it.

Supply chain disruption has resulted in nationalism and protectionism, so the risk of dependence on a few countries needs to be overcome by diversifying to achieve resilience. The panelist proposes cross-border vertical foreign direct investment for this, and says Greenfield and M&A should be encouraged in supply chain networks to create jobs.

The Asia-Pacific economy should make a stronger, concrete commitment to grow

green growth to meet the target of the United Nations Climate Change Conference, and become carbon neutral should be seen as an opportunity rather than a risk.

SME and startups in the Asia-Pacific need to be a part of the innovation and manufacturing ecosystem, and the panelist urges Asia-Pacific economies to create an open SME knowledge platform for regional collaboration.

In light of the soon to be enacted RCEP, the already enacted CPTPP should expand to become the most advanced and wide-reaching rule-based trade and investment framework in order to shun protectionist policies.

Finally, the panelist argues that APEC and G20 should be made more effective and robust for a better free trade and investment system to ensure inclusive growth, and concludes that Asia-Pacific economies should stick to a rule-based regional trade and investment system.

### **Panelist C**

The panelist says that innovation and manufacturing represent a possible way forward in dealing with Covid-19. All countries in the Asian region have tried to adapt to Covid-19, with businesses evolving and creating new and strategic plans. This is becoming quite evident in India, with Q3 results showing continued expansion and resulting in the fourth consecutive quarter of growth. The Indian economy is bouncing back with 7.8% growth expected, and 8.4% the following year. The panelist remarks that India has now given a first shot of Covid-19 vaccine to 82% of its population, with 45% having had their second shot, thus increasing the insulation of economic activity. The country has exported 197 million doses to surrounding countries and Africa, and mutual cooperation is creating greater engagement abilities.

The Indian government's response has also evolved. GST collection is rising, and exports have rebounded, and increasing credit expansion is being observed in India, and these three factors have greatly influenced monetary and fiscal policy.

The panelist notes the importance of technology and mentions fintech-related initiatives in India, placing importance on a potential fintech corridor between India and Singapore. The panelist then mentions that according to the ADB's SME monitor, SMEs account for 99% of enterprise in cottage industries, and 33% of GDP in South Asia. This illustrates their importance, and the panelist asserts that MSMEs need to be focused on. Efforts in India are concentrated on ensuring access to credit for them, and this is why exports are bouncing back. With regards to policy coordination, the panelist suggests Indonesia's leadership of the G20 and India's in 2023 will be

important.

#### **Panelist D**

The panelist states their intention to discuss post-pandemic prospects for Myanmar, starting with the Covid-19 situation. Myanmar's partial vaccination rate is 31.7%, with a full vaccination rate of 20%. The data suggests that Covid-19 is under control, and businesses have resumed their functions in line with their contracts.

Although economic growth was forecast to be 1.8% by the ADB in 2020, Covid-19, a state of emergency, and international pressure on the business sector have resulted in growth being down. The ILO estimates that 3.2 million jobs have been lost, there is difficulty in accessing financial and banking services, reduced mobility, weakened consumption, investment, and trade, operations have been disrupted, and there is instability in the exchange rate.

Digitalization is Covid-19-driven in Myanmar, which has a cash dominant financial system. The country has a mobile subscriber rate of 1.5 times the population, meaning many people have two or more mobile phones, but only half the population has access to the internet.

While Myanmar has many laws on environmental conservation, it still has a long way to go in terms of clean technology. The panelist notes that there are many opportunities for investment, including renewable energy, resilient smart electricity grids, waste management systems, and electric vehicles like cars and trains, although there are challenges in terms of human resources, technical requirements, and natural resource management.

MSMEs comprise more than 99% of business in Myanmar, and contribute 36% of GDP. The informal economy presents a large challenge, and even though there are laws in place, there is a lack of enforcement. It is important for MSMEs to understand laws and regulations. While human resource and competency challenges remain and illegal trade has a large impact on SME growth, there are opportunities to leapfrog to a cleaner, digitized future.

The panelist notes that in the post-pandemic era there will still be challenges due to the political crisis and sanctions, but there are also opportunities. The country is struggling and needs help from the Asia-Pacific if it is to avoid a contraction of 18% as the World Bank expects.

#### **Panelist E**

The panelist states that in the Covid-19 pandemic in Vietnam, there have three



factors behind economic performance: how Covid-19 has been controlled, good policy to respond to the pandemic and support people and business, and utilization of FTAs. Vietnam has been successful in controlling the first three outbreaks, but the fourth has caused problems and economic growth has been affected. Vaccination has now picked up pace and the policy has changed to living with Covid-19.

Social, fiscal, and monetary has been geared to supporting people, and the pace of investment has been picked up, particularly in infrastructure. However, the scale of the measures has been smaller than other countries in terms of GDP and based mainly on monetary policy. Vietnam managed to keep growing last year, but this year is unable to keep pace with the recovery of partners in many areas. The hope is for high economic growth of 6.5% next year.

The Vietnamese government is currently drafting a new program for recovery over the next two years that have a larger scale in terms of GDP, and structural and institutional reform shall continue along with this. Vietnam will deepen its focus on building macroeconomic resilience, private sector development, and leveraging its advantages in terms of integration.

The panelist notes that Vietnam is also promoting innovation and startups with innovation centers in Hanoi, Ho Chi Minh City, and Da Nang, and an attempt will be made in a few years to develop a financial center, perhaps in Ho Chi Minh City.

### **Moderator**

The moderator thanks the panelists and declares that proceedings will now move on to comments on the five presentations from discussants.

### **Discussant A**

From the perspective of the research that ERIA does, we have noted some markers for the coming years. Our concern is mostly development in Asia and the Asia-Pacific. Liquidity infusion is becoming more difficult for developing Asia, making it difficult to implement any growth strategy, and this will continue to be a concern in the coming months.

Limited mobility of people gives Southeast Asia a unique problem in the services sector. Rebuilding demand for goods and services is important as trade has remained average throughout this crisis, but incomes have been impacted negatively in greater degree. Growth strategies will have to be inclusive, and they must examine the entire future of work. New strategies and perspectives for growth in post pandemic world will be required.

From a global perspective, supply chains in Asia have been resilient to trade tensions and the pandemic, thus far. At the same time, there is a realignment towards the economic architecture of the Indo-Pacific. While the US and EU pledge to be important contributors, it will likely be Asia itself that will define the new economic linkages in the Indo Pacific economic architecture.

With the G20 coming to the global south, will it become more inclusive and take into account the concerns of developing economies? If it does, and includes mechanisms for recovery from the pandemic, then the G20 can be an important indicator of the future of multilateralism.

### **Discussant B**

The COVID pandemic has provided an opportunity to reflect on our pace of working and the content of development, particularly in terms of modes of production and consumption, our role in the universe, our relationship with the external environment and our internal humble self, that is worthy of our efforts in promoting civilization.

The business community in Taiwan has recently been discussing the environment and social governance, discussing matters beyond GDP and going beyond shareholder supremacy. Instead of these things, the focus is on climate change, carbon footprint, carbon neutrality, net zero, green credit, and supply chain greening.

### **Discussant C**

Two important issues require our core attention: how to optimize the benefits of digital transformation and to reduce its adverse effects, and how to efficiently and effectively transition to a greener and sustainable economy. These are two of three priorities that Indonesia will tackle at the G20 next year, the other one being how to strengthen global health systems.

Indonesia would like to work on its digital transformation and transition to a green economy, but there are challenges. Indonesia still needs to deal with the pandemic and to strengthen its economic recovery, although the situation has improved a lot over the last four months. Covid-19 transmission is largely under control and the economy is fast growing, but Indonesia is still struggling to make rapid progress in terms of the digital economy. Indonesia still needs, among other things, better digital connectivity as well as a sufficient digital and supportive regulatory framework to maximize the benefits of digital technology.

To transition to a green economy, Indonesia, and most countries in Asia-Pacific, still

require a lot of investment and financing. Moreover, transition to a greener economy requires a big shift of paradigm and a significant change in its existing economic institutions. With the support of the global community and greater cooperation with other Asia-Pacific countries, I'm optimistic that Indonesia and other developing countries in the Asia-Pacific can achieve this.

#### **Discussant D**

I'd like to discuss two main points.

The first point is that countries in Asia need to rethink their economic development model instead of balancing between sectors. In the case of Thailand, for example, the belief was that the country is well-balanced in terms of manufacturing goods and agricultural products yet also having a really big tourism sector. But when the COVID pandemic happened, the tourism sector halted and this created a lot of economic hardship for many Thai people. The economy needs to have a more balanced portfolio, while being more inclusive as well as more environmentally friendly.

My second point is that looking forward to a post-COVID world, I think there will be new development objectives. The focus in the past was largely on efficiency, and we used just-in-time production. But in the future, we will need to have multiple development objectives - not only for efficiency and growth but also for risk management. As well as just-in-time, there will also be just-in-case for contingencies. There will also be new constraints in development since households, the corporate sector, and the government have a greater financial burden and fiscal burden from fighting the pandemic. We need to be not only more resilient, but also more efficient in terms of using resources. Digitalization can be a tool to achieve this.

#### **Moderator**

The moderator thanks the discussants for their contributions.

Before the start of the discussion, the moderator notes that they are glad that the nations are dealing with the pandemic well, and while there are still uncertainties, the economies have overcome the most serious difficulties. The moderator also notes the importance of the digital economy as it is growth driver that will provide the leeway for reform, liberalization, and cooperation. This is also a growth driver, and thus a virtuous cycle will be formed.

The moderator now moves the proceedings on to the discussion with audience participation.

## **Discussion**

### **Discussant C**

I will start by looking at digital transformation. It is sure to be the future of our economy, and will bring a lot of benefits to our economic growth and economic development. There are naturally many things that need to be done, not only in terms of connectivity issues or domestic regulatory framework to support the digital economy, but the creation of an international arrangement on the digital economy because this digital transformation has actually already transformed the way transactions are performed, not only in the domestic economy but also across borders. More supportive rules and arrangements will also be required at the regional level. I think countries in the Asia-Pacific need to speed up this kind of action.

### **Moderator**

This is an important point. We need rules for data flow, e-commerce and other such matters. Are there any other views on this?

### **Discussant D**

I think digitalization is really important for recovery and generating new growth in the post-COVID world. However, the obstacles in Thailand, as I'm sure they are in other countries, are in the government sector. Digital government services are very important. The private sector has already quickly transformed its business model, and people can work from anywhere. Transactions can be conducted online, but problems always arise when the government is involved.

There are so many matters in government legislation and regulations that are outdated and have to be upgraded so that we can move forward to the digital economy.

### **Participant A**

While I do support the idea of promoting the digital economy, I would like mention possible negative impacts of the digital economy or digitalization. One is possible unemployment. As we know, digitalization tends to reduce the demand for labor, and this leads to unemployment. When unemployment comes into the picture, I would like to know how the labor market will respond. This is related to regulation in the labor market, and if we have a flexible labor market, the cost of unemployment can be reduced. So, I would like to ask the panelists what the labor market situation is in their country, and is the country ready to deal with any unemployment which may arise from digitalization?

### **Panelist B**

In Korea, there is a well-developed digitalization background across all sectors. When many factories and services providers started to adopt a digitalization program, we see that a lot of people become unemployed, especially at SMEs. Rather than giving a direct subsidy to help deal with the current pandemic, I have suggested that the government provide some vouchers for a very comprehensive digital training program because the people who work at SMEs are off work anyway while factories are shut down. This is one thing we can do, encouraging digitalization at the very starting point for self-employed people. But many business sectors above those self-employed people and many companies have started to adopt digitalization. As such, the Korean education system is now trying to make digital courses, courses on AI, and other such major compulsory courses from elementary to middle and senior high school, and even at college. So, I think we really need to institute a digital training program throughout the entire education system.

This is our national agenda, but Asia-Pacific-wide, I would like to emphasize that the region needs to agree on a digital open e-commerce platform for our struggling SMEs. This should be our region-wide effort.

### **Moderator**

Are there any comments on the negative aspects of digitalization?

### **Discussant A**

Labor is substitutable in the digital economy, but this substitutability has not exactly been calculated. Establishing policies for the replacement of labor is a huge challenge before governments at this time, more so, in those countries where the digital economy is emerging. Because the degree of substitutability is still largely unknown, it becomes a challenge from a policy perspective.

However, the digital economy and digitalization increase the productivity of skilled labor while being likely to reduce the participation of unskilled or low-skilled labor. Manufacturing is not going to go away in the digital economy, and while the nature of manufacturing may change, low-skilled labor will still be required. So, countries are more or less going back to the same drawing board: how much investment in manufacturing and how much investment in the digital economy. Getting that balance right is the immediate priority for most of the developing Asia.

**Panelist A**

I think digitalization is the main trend for the future. It's developing very fast in China, both in terms of the breadth and depth of its coverage and depth. The coverage reaches almost every area; production, commercial activities, human lives, finance, and culture – almost everything. This trend will develop further.

One of the big effects in China is the connecting of rural areas, which can overcome the traditional gap between rural areas and urban areas, allowing rural areas to join this digitalization framework for selling, production, technology, and so on. This mainly damages traditional trades, so they have to readjust. Government tax systems and human life also have to adjust. For SMEs, it's both an opportunity and challenge, but the challenge I think, even to some extent as a threat, is to the traditional ways of business and so they have to adjust. In some cases, the cost is very huge. However, as I mentioned, that's a trend we have to accept due to the speed of technological development.

**Participant B**

It is quite interesting to hear that while we have to promote digitalization, there are some negative aspects of digitalization that we have to overcome. What are your views on the negative aspects of clean energy promotion, and how can they be overcome?

**Moderator**

I will first get all of the questions.

**Participant C**

I have some comments and a question. I would like to raise four issues that need to be considered when it comes to the digital economy and digitalization.

The first issue is the regulatory framework. I fully agree that a rules-based approach to the digital economy is important. China has seen rapid development of its digital economy recently, but of course, it has also encountered some critical matters that need to be tackled. The first is data security, the second is inclusive and nondiscriminatory policy on the part of large companies, the third is the protection of vulnerable individuals, because China has seen many vulnerable individuals losing a lot of their wealth because of this P2P online credits or online loans, and the fourth is how to balance this encouraging innovation while regulating monopolies. While in the early stages of the development of digital economy there should be

sufficient freedom for startups and different tech companies to develop, we have to prevent the trend of these big companies become monopolies in the industry.

The second issue is infrastructure. The development of the digital economy heavily depends on infrastructure. China benefits a lot from lower rates for broadband and mobile phone fees, and this is the basic infrastructure for utilizing the ICT technology, especially now when it comes to introducing 5G technology. This is going to be another big push in the development of digital economy. 5G probably has done well in Korea, and China is also trying to catch up.

The third issue is logistics. With e-commerce, we need to have very efficient, effective and cost-efficient logistics.

The fourth issue is the flow of capital. How to regulate cross-border capital flows and transactions potentially needs to be considered. In addition, how to coordinate the policy of different countries in terms of taxation in the economies of the region is also a pertinent issue.

I would like to know about infrastructure and regulatory framework in other countries. The digital economy is still at an early stage of development, so we need to have a lot of effective discussions in consideration of an overall regulatory framework for the Asia-Pacific region to make sure it is conducive to the development of region's digital economy.

#### **Panelist D**

I would like to respond to what was said about the negative aspects of the digitalization. Myanmar is an LDC. 67% of the population live in rural areas and are not well educated. These people need jobs, and they don't have the capacity to learn about digitalization or such things.

Because Myanmar is an LDC, for trading and services, digitalization works. But the local ecosystem needs to grow more because there is a high level of superiority in the surrounding countries concerning digital issues. But for the manufacturing sector, 60% of MSMEs are in the food industry. They don't have the money to invest for the technology, they still use manual workers. Digitalization is good in some aspects for Myanmar, but there is a lot of unemployment and half of the population, more than half are young women in the rural areas, so we do need manual work. Digitalization is good, but we cannot make it our only focus. The investment, the technology, the capacity, all of these are still a big requirement for the country, and we need to provide jobs to those from the rural areas and who want to migrate to the rural areas.

**Panelist B**

I would like to provide a couple of comments on digitalization. While the pandemic accelerated digitalization, it also really created a digital divide, especially in Korea. Microbusiness is still really at the infant stage of digitalization, so we need to pay attention to how we can ensure the microbusiness goes digital. The second issue is the substitutability of digitalization for labor. In Korea, I was really surprised that untapped industries suddenly mushroomed, especially delivery services. I think digitalization can also create new job opportunities, while making progress on the digital service-ization of your economy.

**Panelist E**

I have three observations. Firstly, before Covid-19 in Vietnam, digitalization created a lot of jobs rather than unemployment pressure because people could use many different platforms for doing business, creating millions of jobs. After Covid-19, digitalization creates unemployment pressure because firms changed their way of doing business from contact to contactless. Overall, it has made a positive contribution by keeping firm in business.

Secondly, the informal sector is a problem. We tried to provide social support to people, but actually accessing employees in the informal sector was difficult. I think ASEAN and Asia should focus more on social security systems, and digitalization can help.

Lastly, the new energy sector. Vietnam has an advantage in developing solar and wind energy, but faces two problems. One is policy, because technology changes quickly, you cannot keep the appropriate policy with a change in technology. The second is the need to have a very systematic approach in developing the solar, wind, and new energy because you need to have a grid system to suit the electricity generation.

**Moderator**

Thank you so much for having had a good discussion. I would especially like to thank the panelists and the discussants for contributing excellent material to our discussion.

Without drawing any conclusions, it seems everybody agrees that in order to promote or strengthen resilience of global supply chains, we need some sort of rule-based trade and investment regime.

I would like to add that we need some sort of evidence-based policymaking process



to be applied to important policy decisions for digitalization and green growth.

## **Session 2: Economic Integration and Trade System of Asia Pacific**

### **Panelist A**

The panelist states that nowadays the world is facing major challenges to its economic growth. The key factors to address the situation are firstly, adhering to the multilaterally-agreed rules of the road, which enable the market to operate as freely and as fairly as possible. Secondly, using the long-standing consultative mechanisms such as ASEAN, APEC, which will be more important than ever so that smaller and medium sized countries have an ability to raise concerns in a multilateral context. Thirdly, adherence by signatories to the high standards set down under CPTPP and RCEP will also be important - especially if additional signatories to these agreements are accepted. Fourthly, while the CPTPP and RCEP include new rules not covered by the WTO, much more needs to be done to develop rules to reflect and manage the rapid changes occurring in the digital economy. Fifth, continued peace and stability in the Asia Pacific remains paramount to ensure ongoing economic prosperity.

### **Panelist B**

The panelist says that lots of issues that need to be considered to achieve sustainable, resilient, inclusive, and dynamic economic growth. One of the most important factors is to establish and manage a free, open, transparent, rules-based economic/business environment, which will facilitate international/regional movement of goods, services, data/information, and people, contributing to expansion/ intensification/ diversification of GVCs. For developing countries, the speaker believes that economic cooperation/assistance from developed economies is necessary. While for developed economies, they are supposed to provide economic assistance (trade adjustment assistance) such as temporary income compensation, human resource development (education and (re)training, digital skills) and the development of SMEs for their own countries as well as for developing countries.

### **Panelist C**

The panelist states that more rules are needed on the field of digitalization, which has been booming during the pandemic and has much promise. For example, signing Digital Economy Agreements (DEAs) with other partners, will be helped to address

issues and be potential pathfinders. Secondly, sustainability and carbon: There are economic and trade issues that arise from the increased attention and commitments to climate action. There may also be concerns over the effects of Carbon-Based Adjustment Measures (CBAM) proposed by the EU or other carbon leakage policies set by our non-Asian trade partners. At the same time, opportunities for cooperation arise and Green Economy Agreements be another path-finding effort. Thirdly, bilateral initiatives: The economic ties with other regions like the EU and with the Pacific Alliance in Latin America will be of importance. In themselves they are important and with Sino-American tensions. In this regard, what had been seen is somewhat like the bilateral FTAs in the early 2000s that then were expanded into ASEAN-wide agreements. As they progress, these can later be open to more partners and also integrated into economic trade and investment agreements.

#### **Discussant A**

We should not pass over “rules-based” with too little deliberation. “Rules based” should not be interpreted as a single unchanging set of rules. We must always expect innovation and change to pose challenges to existing rules. There is no international authority to create and enforce rules across the sphere of economic cooperation. Rules are “legally binding” if their rupture would be embarrassing and embarrassment usually comes at little cost. No single economy can impose rules on the international system with any degree of validity. International rules have to be negotiated and agreed. They will inevitably prove to be inadequate in the face of technology and other changes. So the maintenance of rules, as much as the formulation of rules, has to be a matter of negotiation and agreement. “Rules-based” has to be understood as “relationship-supported”.

#### **Discussant B**

There are some key issues that need to be addressed in the area of digitalization. The first one is rule-based competition. Secondly is labor security and protection. Thirdly, we are also supposed to pay more attention on data access, privacy and security issues. Meanwhile, regional cooperation must be strengthened in order to better address cross-border issues and challenges.

#### **Discussant C**

We need some soft approaches like having arrangement on SMEs. Digitalization has potential to divide the region, but it also has the ability to facilitate the region

economy activities. It is important that we work with the digitalization, collaboration, cooperation within the region, because each region would be a part of the chain, the third point the speaker would like to talk is SMEs, every countries in the region depend heavily on SMEs, yet they have been very little integration approach on SMEs, the CPTPP has got very good chapter on SMEs, we need to consolidate on this and have a real collaboration on SMEs, so that SMEs can be very resilience. Let SMEs to be a tool for greater economy integration within the region.

### **Discussion**

1. I would like to discuss on SMEs issues, I do agree with all the comments. Secondly for the political issue, I have some experience in Japan in formulating SMEs policies, all political parties they support SME. Because of the political influence that SMEs have, 99% Japanese firms are SMEs, but 70% employees they work for SMEs, so supporting SMEs, you get the vote. I think what is needed is to promote competitiveness of SMEs, that is the way that we achieve economy goals

2. I want to ask a question. In the first session I indicated that it is important that the membership expansion at the CPTPP, but what is the entry criteria for the existing CPTPP member to decide which country would be accepted or rejected. I know the existing member can access those countries who wants to join?

3. I think we must be open about the idea I mentioned how digital economy might be different? We look a way to integrate the issues into our existing trade tides, but there are so little about digital economy before. I think digitalization is new factor that deserve attention, which would also be very important for economy integration. As for this, I do want to know the American initiative, I don't know whether people should be open to discuss on some elements like investment, digital or other elements of cooperation with them.

### **Closing Remarks**

#### **Masakazu Toyoda**

The speaker expresses his gratitude to the moderators and the participants in the discussions. He notes that he found it interesting to hear about the negative aspects of digitalization in the first session, but that these shouldn't stop this important movement.

Finally, the speaker reiterates his gratitude for the insightful discussion today.

**The concluding remarks A:** while many positive signals have been captured from the speeches of experts, and of course there are also problems. She believes what the keynote speech suggested that speeding up the establishment of an Asia-Pacific free trade area is a very important main stay and the path choice. Besides, in order to promote an open Asia-Pacific economy, while advancing a high level of openness, it is necessary to consider how to include low-income countries, developing countries, low-income groups, and small and medium-sized enterprises. Finally she states that hope the Asia-Pacific Forum will continue to play an important role on these important topics.

**The concluding remarks B:** The discussion was interesting to hear some negative perspective about that, but those negative aspects should not stop those important movement, the most important thing is how to overcome those negative aspects and maximize the benefit of digitalization, green energy etc, and it is important that we learn from each other in Asia-pacific region. For the second session, everybody agree that the rule based competition is very important, but there are still some limitations to overcome to move further liberalization, perhaps the soft approach might be important and I say not only ASEAN country, but also Asia-Pacific region need to work together for the world economy.

## 7. 発表資料

パワーポイントスライド、トーキングポイント、メモを活用したスピーカー分のみを掲載。

### **Session 1: Growth Strategy of Asia Pacific**

- ① Dr. Prof. AHN Choong-Yong
- ② Daw Khine Khine NWE
- ③ Dr. VO Tri Thanh
- ④ Dr. Man-Jung Mignonne CHAN

### **Session 2: Economic Integration and Trade System of Asia Pacific**

- ① Amb. Murray McLEAN
- ② Prof. Shujiro URATA
- ③ Prof. Simon SC TAY
- ④ Prof. Gary HAWKE
- ⑤ Dr. Josef T. YAP

Session 1: ① Dr. Prof. AHN Choong-Yong

Asia-Pacific Forum 2021:

Remarks at the session 1: Growth Strategy of Asia-Pacific

By Ahn, Choong Yong

Distinguished Professor, Graduate School of International Studies

Chung-Ang University

- 1) Asia Pacific economies are truly diverse in terms of population, GDP, and development stage, including the world top three economies, the US, China, and Japan, and other major economies like the sub regional economic entity, ASEAN, India, Canada, South Korea, Australia, Mexico, and other developing economies.
- 2) APEC 21 members of Asia-Pacific occupied 62 percent of world GDP and 52 percent of global trade respectively in 2020. Eleven of the Asia-Pacific economies constitute the already effective CPTPP. In November 2020, the 15 regional economies concluded the RCEP, which is likely to effectuate in early part of 2022. Seven economies belong to both CPTPP and RCEP.
- 3) Since the outbreak of the Corona Pandemic in December 2019, Asia Pacific economies like the rest of the world economies have suffered unprecedented economic fallouts. In 2020, the US and Japan's economy contracted 3.5 percent and 4.7 percent respectively while China registered 2.3 percent growth still much lower than 6.0 percent growth in 2019. East Asia and Pacific economies as a whole performed with 1.2 percent growth rate much better than the world growth -3.5 percent in 2020 (The world Bank, global economic Prospects, June 2021).
- 4) During the high time of the Pandemic last year, the lockdowns caused

terrifying disruptions of well embedded regional supply chains, even feeding inflation in many countries, and further stopped nearly movement of people to chill entirely intra-regional travel and tourism. As a result, the Asia-Pacific economies have experienced the worst economic contraction and massive unemployment since the great depression.

- 5) Together with the Pandemic, climate change driven natural disasters and trade rows between major economic powers, especially between the U.S. and China are likely to contribute to downside risk and uncertainty a great deal even in the post-Pandemic era.
- 6) At present, with the corona vaccination significantly underway, Asia Pacific economies have gained significant growth momentum but there is considerable uncertainty about its durability. With severe outbreaks of the Pandemic continuing, Asia-Pacific economies face daunting challenges on how to leverage concerted and collective regional efforts to ensure speedy recovery and sustainable growth. What would be our effective multilateral strategy for Asian-Pacific economies to return to normal growth track in the post-Pandemic era?
- 7) Foremost, early vaccinated high income countries and vaccine manufactures should support the regional production of COVI-19 vaccines in near term to developing Asia-Pacific economies through financing and technology transfer so that adequate numbers of people across nation could be vaccinated and prevent more virulent virus mutations. In this regard, early vaccinated countries and vaccine manufactures also need to deliver to COVAX facilities in the near term. We should remember that there is no real exit from the Pandemic unless any single country is free from the Pandemic spread.
- 8) Second critical issue is related to how we can ensure regional supply chains

resilient. In reality, about 70% of international trade today involves global supply chains as services, raw materials, parts, and components cross borders numerous times. The supply chain disruptions while the COVID-19 Pandemic unfolding has invoked nationalistic reshoring policies for self-sufficiency and protectionism. We learned from the COVID -19 spread a hard lesson that the commercial efficiency and cost effectiveness with no inventory practice for regional supply chains in the pre-pandemic period is being now replaced by new values like resilience and stability. In the past two years, we also experienced that the supply chains have been disrupted by three forces; 1) COVID -19 pandemic, 2) climate change driven natural disasters, and 3) geopolitical trade rows among major powers in the region. Therefore, the more we reduce the risks associated with excessive dependence on a single country, the better we would be positioned to make supply chains more secured.

To ensure the economic recovery momentum going, we need to recognize the proliferating production fragmentation across countries creates a strong trade-investment nexus. Especially, cross-border vertical FDI tends to complement trade because cross-border production entails trade in intermediate inputs between multiple divisions of the same firm, leading to natural and inevitable supply chains.

Toward the supply chain resiliency, we need to diversify supply chain outsourcing. For this purpose, we need to increase supply chain capability and green investment of each regional economy by encouraging cross-border supply chain FDI flows for sustainable growth. In this regards, Asia-Pacific economies, developed or developing, should revive the functions of WTO, WHO, and COP institutions to shun away a danger of protectionism and nationalism.



Given the trade-investment nexus, cross-border vertical FDI in the form of greenfield investments or M&A type investments should be encouraged for supply chain network based on comparative advantage to generate economic efficiency and well-beings of consumers, most importantly job creation for all the trading partners in the Asia-Pacific.

- 9) Third, stronger concrete commitments to green growth are needed to meet the target of the United Nations Climate Change Conference (COP26). A policy strategy that encompasses an international carbon price floor adjusted to country circumstances, a green public investment and research subsidy push, and compensatory, targeted transfers to households can help advance the energy transition in an equitable way. “Going green and going carbon neutral is where the global economy is going, it should be considered an opportunity to grow and expand instead of seeing it as a risk.”
- 10) Fourth, SME’s and start-ups in Asia-Pacific should be a part of the innovation/manufacturing ecosystem. SMEs in Asia-Pacific economies are the backbone of every economy and essential part of innovation/manufacturing ecosystem, providing major portion of national employment but technologically outdated and domestic market oriented. Asia-Pacific economies are urged to create a regional open SME knowledge platform for regional SMEs to adapt to digital business environment and globalization process, eventually leading to a regional digital trade pact, a new path forward for their competitive survival.
- 11) Fifth, in an Asia-Pacific regional context, given the conclusion of the RCEP just a year ago between 15 signatory member states, the already effective CPTPP should expand its membership to establish by far the most advanced and wider rule-based trade liberalization and investment facilitation

framework, which will help shun away the protectionists policies. In the absence of the U.S. membership in the CPTTP, it should be noted that the U.K., China, and Taiwan have submitted official applications to join the CPTPP. Korea is likely to follow suit very soon.

- 12) For the expanded CPTPP, the sooner the U.S. rejoins the free trade deal, the better the Asia Pacific economies to engage in reviving a more resilient supply chain network in a rule based regional framework. In this context, although lower quality than the CPTPP, the RCEP needs to be put in force rather quickly next year to ensure an open regionalism back and then to upgrade it for eventual convergence of the two mega deals down the road by eliminating tariff and non-tariff barriers deeply and widely and introducing labor and environmental standard., protection of intellectual property rights, most-favored nation treatment for foreign invested companies, and an investor-state disputes settlement mechanism.
- 13) Together, we should also note that the APEC and G20 process should also be more effective and robust to build back better regional free trade and investment system for inclusive growth across developing and developed countries.
- 14) Finally, for any geopolitical reasons, any country's supply chain linkages should not be disrupted. Asia-Pacific economies should stay on a rule based regional trade and investment system as the APEC has alluded for the FTAAP many years.

# Post-Pandemic prospects for Myanmar

Presentation prepared for  
 “Process of Asia Pacific Cooperation in the Post Pandemic Era:  
 Opportunities and Prospects”

3 December 2021

by  
 Khine Khine Nwe  
 Joint Secretary General  
 The Union of Myanmar Federation of  
 Chambers of Commerce and Industry  
 Myanmar

## COVID-19 Situation

### Vaccination:

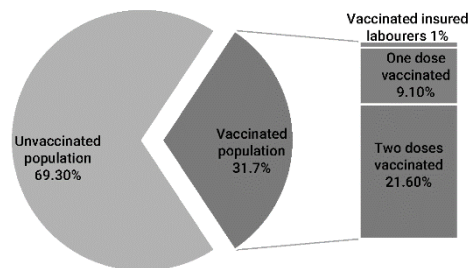
- **Target** – 50% of over-18 target population (37 million) by end-2020
  - ~200,000 doses / day
- **11.6 million (~31% of target population, 20% of entire population) fully vaccinated** as of 27 November 2021
- over **0.9 million insured labourers** (83% of Social Security insured pool) vaccinated as of late November.
  - 2,000 labourers vaccinated/day.

### COVID-19 situation:

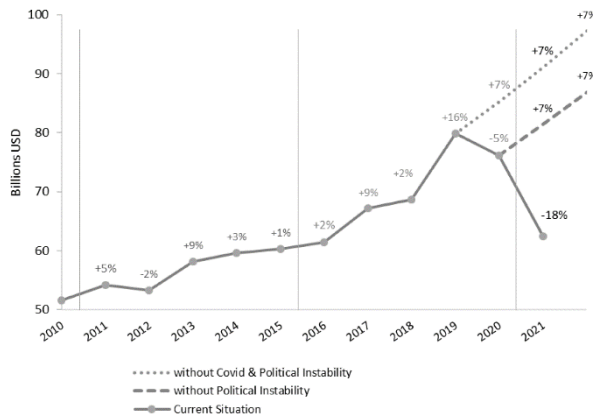
- Three waves
- Severe health system challenges after February
- Devastating Third Wave (Delta + Impact of political crisis)
- **90% of businesses negatively impacted**

Note : The vaccination of labor in the informal economy is not accounted for in the calculation.

THE REPUBLIC OF THE UNION OF MYANMAR MINISTRY OF HEALTH	
<a href="#">Home</a> <a href="#">News</a> <a href="#">Announcements</a> <a href="#">Others</a>	
ကိုဗစ်-19 ရောဂါ ကာကွယ်ဆေး ထိုးနှံ(ပြီးစီး)မှု (30-11-2021 ရက်နေ့အထိ)	
Cumulative fully vaccinated people	- 11,858,598
Cumulative one dose vaccinated people	- 4,990,574
Cumulative vaccinated people	- 16,849,172
Cumulative vaccinated doses	- 28,707,770



## Economic impact



### Projections:

- 1.8% growth in 2020 (ADB)
- 18.4% contraction in 2021 (World Bank)

### Impact of pandemic and political crisis

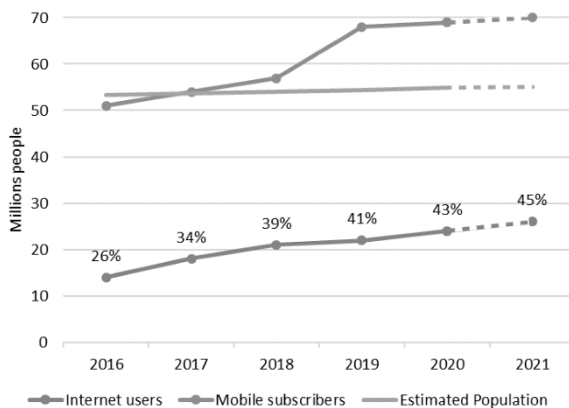
- ILO: **3.2 million jobs** (15% of workforce) lost since March 2020
  - 2 million (2020)
  - 1.2 million (2021, up to July)

### Economic activity hit by

- Difficulty accessing financial & banking services
- Exchange rate instability
- Reduced mobility, weakened consumption, investment and trade
- Disrupted operations, labour supply and inputs

2

## Covid-19 driven digitalization



- **Cash-dominant financial system**
  - ~ 15% of businesses started/ increased digitalization since pandemic began
- **Sizeable gap in adoption of online & digital financial services**
  - 3.6% make purchases / pay bills online
  - 0.7% has mobile money / digital wallet account
- **Cash shortage in 2021 forced second round of digitalization.**
- **Impetus for digitalization of bureaucracy**

3

## Digitalization

Digital Economy Development Committee (Est. 2017)

- Digital Economy Roadmap (2018-2025) to enable digital transformation, e-Government and digital trade

Central Bank of Myanmar

- Myanmar Payment Union (2011)
- launched new payment and settlement system (2020)

Myanmar Digital Economy Association (Est. 2019)

- Promote digital economy ecosystem
- Innovation for traditional brick-and-mortar businesses through digital platforms
- Increase market access for MSMEs
- Promotion and advocacy for digital economy industry development
- Research and advocacy for policy and legal matters



### Challenges

- Limited digital literacy (especially SMEs)
- Paper-based bureaucracy
- Limited internet access
- Lack of capacity
- One-dimensional landscape (overwhelmingly dominated by Facebook)

4

## Clean Technology

### • Economic policy on environmentally sustainable pathway

- Environmental conservation law (2012)
- Environmental Impact Assessment Procedures (2015)
- National Environmental Policy (2019)
- Myanmar Sustainable Development Plan (2018)

### • Opportunities for

- Renewable energy (solar, wind, hydroelectric and geothermal) generation
  - only 50% of households have access to electricity (2020)
  - Large-scale as well as mini/micro grids
- Resilient and smart electricity grids
- Waste management systems
- Electric vehicles (cars and trains)

### • Major benefits

- Development through energy equity (e.g. mini/micro-grids in remote / hard-to-reach communities)
- Fuel imports
- Air quality

### • Challenges

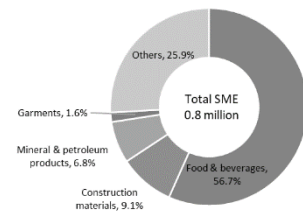
- Human resource & technical requirements
- Management of natural resources



5

## SMEs & Startups

- Over 99% of businesses are SMEs
- Contribute 36% of GDP
- Challenges
  - **Large informal economy** (over 80% of workforce, IMF 2020; and estimated to be larger than the formal economy, UNCTAD 2021)
  - Only 10% of business loans go to MSMEs, 5% of total outstanding loans (ADB 2020)
  - Technology and productivity
  - Policies, laws and regulations, including lack of understanding
  - Human resource and competency
  - Illegal trade
- Opportunities to leapfrog to a cleaner digitized future
- No evidence that clean tech-based economies grew slower



6

## Post-Pandemic era

- **Opportunities and challenges**
  - Current political crisis and calls for broad economic sanctions
  - Policy inconsistencies
  - Businesses trying their best to brave the multiple challenges
  - Innovation, R&D, resilience and sustainability

7



# VIETNAM ECONOMY AMID COVID-19

Hanoi, 03 Dec 2021



Covid-19 hit hard the world economy. VN is not an exception

***The economic performance depends much on***

- The way of dealing with Covid-19: How to balance the implementation of “social distancing”/“locked down” policies with “opening the economy” (?)
- Government’s policy response to support business and people
- Utilization of the FTAs (esp. as the partners’ economies have recovered)



### ■ Controlling Covid-19

- Response earlier as in January 2020 with the participation of whole political system and support of people
- Quite successful until March 2021, but having problems in controlling the 4<sup>th</sup> outbreak (Many provinces, incl. HCM City and Hanoi, have had to implement very strictly “social distancing” and “locked down” policies”)
- Vaccination has been accelerated since Aug 2021 + Strategy of fighting against Covid-19 has changed, with “living safe with pandemic”



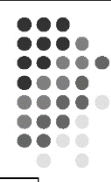
### ■ Having policies to support business

- Following market closely, getting timely feedbacks from business community, and being ready for various scenarios, incl. the worse one.
- Trying to make and to implement policies timely and proactively, incl. the social, monetary and fiscal measures, the measures for accelerating public investments, and the measures for minimizing disruptions of supply chains (Measures issued in March and April 2020, expanded and continued in 2021)

#### An assessment:

- The size of supporting measure package is not big enough (much smaller in terms of GDP compared to the world average and other economies in the region)
- The package relied on monetary policy rather than fiscal expenditures
- The implementation & disbursement has been in general much slower than expected

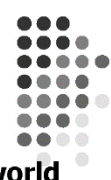




■ ***Economic performance***

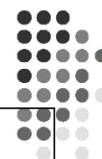
<b>GDP growth (%)</b>	<b>Vietnam</b>	<b>World (IMF 10/2021)</b>
2020	2.9	- 3.1
2021 (projections)	2.0 – 2.5 1 <sup>st</sup> H: 5.6; 3 <sup>rd</sup> Q: -6.2 (HCM City: -25)	5.9
2022 (forecast)	6.0 - 6.5	4.9

- 2020 & 2021: The lowest growth rates in process of Doi Moi. 2020: a “star” among few economies having positive growth in the world recession. 2021: Falling far below the “world average”. An optimistic view on VN’s recovery in 2021
- Good news: (i) Low inflation. Average 9 months: 1.8% (ii). Merchandise export: USD 240.5 bill, increased by 18.8%; (iii). FDI commitments: USD 22.2 bill, increased by 4.4%. FDI implementation: USD 13.3 bill, decreased only by 3.5%
- **Note:** in the 1<sup>st</sup> half of 2020 merchandise export decreased by 11.0% but for the whole year increased by 5,1 % (EVFTA became effective since Aug 2020)



***Way Forward: “Rethink, Redesign, and Rebuild” in a changing world***

- Designing and realizing a Program for promoting recovery and development the economy
  - Size: big enough. Time: long enough (2022-23). Implementation: decisive enough
  - Not only to support business community to overcome current difficulties and to recover quickly but also somehow to accelerate the structural and institutional reforms for a sustainable, inclusive and innovative development, while paying attention on managing risks and uncertainties for ensuring resilience of the economy to various kinds of shocks



Reforms till 2019	Reforms amid & post Covid-19
Business environment improvement (esp. since 2014)	Continuation with accelerating administrative reforms and E-gov't building
Restructuring of the economy (SOEs; Financial & banking sector; Public investment)	Focus is also on private sector dev't and restructuring of agricultural sector, tourism, and some industrial clusters.
Deeper international integration (TPP/CPTPP; EVFTA: AEC và RCEP; some bilateral FTAs, ...)	Effective realization (CPTPP since Jan 2019 & EVFTA since Aug 2020). RCEP: Since 2022 Attraction of quality FDI, esp. the leading firms, thanks to the shifts of GVCs
Promotion of productivity and innovation/startups (esp. since 2015)	Mobile money, Fintech; Program of National Digital Transformation (6/2020); AI Strategy; Innovation Centres; Financial Centres ...

# Growth Strategy in Taiwan

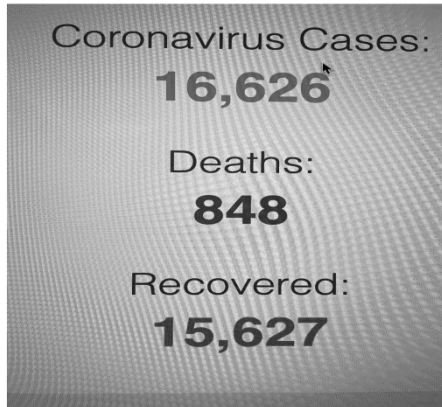
Dr. Mignonne Man-Jung Chan (詹滿容)

2021.12.03.

## Briefing Outline

- Taiwan's Economic Growth under the on-going Pandemic and Vaccination.
- Taiwan's Digitalization
- The Cost and Benefits of Clean-technology-based economic growth
- the Role of SMEs and Start-ups in Taiwan's Economic Growth & Promotion Strategy

## Sound COVID-Fighting, .... but Insufficient Vaccination Coverage

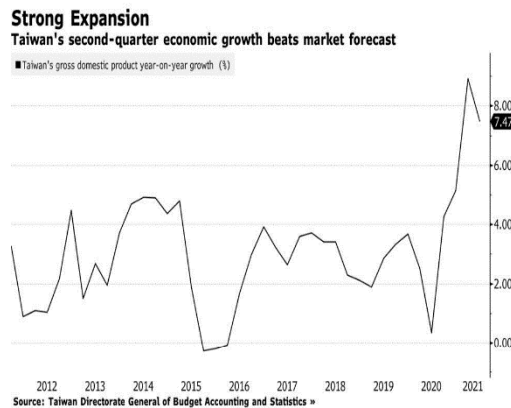


Taiwan's COVID Cases as of 2021.12.02

- the “precision-prevention” model of strategies: including tight border controls, strict quarantine policy, procurement of anti-pandemic medical supplies, and public campaign on health awareness (mandatory face-mask wearing in public, maintaining proper social distance, and handwashing procedures).
- In addition, the medical facilities and a national health insurance program along with the utilization of technology and big data to enhance enforcement.
- Due to insufficient supply, vaccination coverage rates: (as of 2021.11.29)
  - 1<sup>st</sup> dose: 70%
  - 2<sup>nd</sup> dose: 30.9%

## Taiwan's Economic Growth

- Taiwan's exporters will benefit from a persistent global shortage in semiconductors in 2022, but moderating external demand elsewhere will cause Taiwan's real GDP to slow to 3.2%, from an estimated 5.7% in 2021.
- The government's new stimulus voucher scheme is expected to spur private consumption, which will offset slower trade & investment growth.



## Cost & Benefit of Clean-Technology based Economic Growth

- According to Deloitte's Report on "Taiwan's Turning Point":
  - The cost of doing nothing is economically devastating--US\$1.4 trillion lost from Taiwan's economy by 2070;
  - The benefit of acting on climate change is the new economic engine---US\$1.3 trillion added to Taiwan's economy by 2070;
  - A gain of US\$165 billion alone --- equivalent to 3 times the entire market value of the Hon Hai Precision Industry, one of Taiwan's largest electronic manufacturers.

## Alert on Economic Sustainability & ESG

- Over the past few years, widely discussed topics in the business community include: climate change, carbon footprint, carbon neutrality, net zero, green credit and supply chain greening, etc.
- COVID-19 is expected to serve as a wake-up call that GDP growth alone does not equal national success.
- "Shareholder Primacy" is somewhat sidelined;
- "GDP and Beyond" – which highlights the concept of economic well-being, including everything from income distribution to healthcare and macroeconomic sustainability.

## Taiwan's Digital Strategy

- 2021.02.05: a “White Paper on Digital Transformation” for the Taiwanese capital to stay competitive in the post-COVID era.
- Five Areas for Transformation: digital infrastructure, digital talent nurturing, digital transformation assistance for businesses, the development of a stay-at-home economy, and contactless services.
- The initiatives include: a big data center and 5G test field, upgrading commercial districts, promoting online entertainment, encouraging digital payments, and enhancing remote medical care. Meanwhile, the government of Taipei is mulling issuing digital infrastructure bonds to realize the digital vision.

## Roles of SMEs & Start-Ups & Key Promotion Strategy

- There are about 1.4 million small and medium-sized enterprises (SMEs) in Taiwan, accounting for over 97% of all enterprises. Hence, SMEs play a very significant role in promoting Taiwan's economic development and employment.
- Providing diverse learning resources and tailor-made counseling to encourage innovation and sandbox experiments;
- Enhancing the entrepreneurial ecosystem;
- Boosting sound financing system for SMEs;
- Strengthening international connection and cooperation.

**The End**

**Thank you!**

**Asia-Pacific Forum 2021**

*“Process of Asia Pacific Cooperation in the post-pandemic era: Opportunities and prospects”*

**Session 2: Economic Integration and Trade System of the Asia Pacific**

**3 December 2021**

**Presentation by Murray McLean**

First of all, I would like to express my appreciation to the Japan Economic Foundation and the China Institute for Reform and Development for arranging to hold this online conference under the difficult circumstances caused by the ongoing Covid pandemic. May I also welcome and congratulate my old friend Mr Masakazu Toyoda on his assuming the role of Chairman and CEO of JEF.

As we all know very well the Asia Pacific region has been and continues to be a major wellspring of global economic growth and prosperity throughout much of the past sixty years. This has also led to enhanced economic integration within the broad Indo-Pacific region and lifted billions of people out of poverty.

When we think of how the region may fare in a post-pandemic era, it is essential to have at the top of mind the key factors that have enabled and driven this prolonged period of consistent economic growth and deepening economic integration.

1. The region has enjoyed relative peace and stability, underpinned by the US forward strategic posture in the Asia-Pacific, for almost all the years since the Korean war (notwithstanding other regional conflicts such as the Indo-China war and other simmering security issues)
2. This relative peace and stability has enabled, indeed encouraged massive flows of investment and technology transfers (both from external sources (notably the United States and Europe) and from within the region (notably Japan followed by the Asian tigers and later China) have taken place. Preferential attraction policies encouraging greater reliance on market forces and the opening up of hitherto closed or heavily protected economies, have further stimulated this growth.
3. The WTO has played a vital role in liberalising and regulating global (and regional) trade and investment and providing an essential framework for rules-based trade and investment



4. In line with global investments and technology transfers, many Asia Pacific countries became crucial parts of in Global Value Chains GVCs and Regional VCs
5. The formation of intra-regional groupings of countries and their associated dialogue partnerships – of which ASEAN is central - followed later by the establishment of APEC as a more geographically far-reaching collaboration have bred and sustained regular habits of consultation and multilateral engagement within the Asia Pacific region for decades. Regular engagement in consultative, consensus-based groupings has become vital in guaranteeing that the interests and concerns of smaller or medium-sized countries are heard and facilitated.
6. Multiple bilateral and plurilateral trade and investment agreements between countries within the region and with countries outside the region supplement the WTO framework and include updated rules and frameworks for new areas of trade and investment.
7. CPTPP as a “gold standard” agreement and the RCEP, separately, embody more ambitious and up-to-date commitments adding to those covered by the WTO and its processes. This all enables further liberalisation and regulation of traditional trade and service trade including digital commerce

Currently the world, including the Asia Pacific region, is facing major challenges to its economic growth. These include:

- the ongoing impact of the Covid pandemic which has contracted global demand, reduced trade and investment and hampered people movement to cite several examples
- at the same time global and regional security and trade tensions exist in parallel with growing competition and assertiveness between China and the United States - a trend that started before the pandemic, but which has deepened further over the past two years
- a disturbing trend by some countries to undermine, ignore or misuse the WTO processes governing fair trade
- we are also seeing the resort to self-interested, unilateral protectionist moves and coercive trade measures in direct violation of established free trade agreements and WTO rules. In so doing these steps have distorted market-based trade in goods and services and in some cases impacted adversely on established GVCs and RVCs.

So where does this all leave us?

In the first part of these very brief remarks, I outlined seven factors (and there are probably more) that have facilitated and underpinned the economic growth and prosperity of the Asia Pacific while leading to greater integration in the region.

All those seven key factors must remain central to our thinking as it recovers from setbacks due to the pandemic.

So, first of all, adhering to the multilaterally-agreed rules of the road will be a crucial element enabling the market to operate as freely and as fairly as possible, so that trade and investment and people flows can be restored and continue to grow and GVCs are not interrupted by protectionism.

Secondly, the use of long-standing consultative and cooperative mechanisms such as ASEAN and APEC, will be more important than ever so that smaller and medium sized countries have an ability to raise concerns in a multilateral context.

Thirdly, adherence by signatories to the high standards set down under CPTPP and RCEP will also be important. This is especially so also, if additional signatories to these agreements are accepted.

Fourthly, while the CPTPP and RCEP include new rules not covered by the WTO, much more needs to be done to develop rules to reflect and manage the rapid changes occurring in the digital economy, to give one example. At the same time parallel policy support to improve digital infrastructure and connectivity is needed so that all countries can take the many new opportunities offered by digital technology.

Fifth, continued peace and stability in the Asia Pacific remains paramount to ensure ongoing economic prosperity

In conclusion, there is good reason why Asia Pacific Economic integration can continue to be nurtured and there is some room to be optimistic if the rules of the road are followed by all countries and partners in the region.

Session 2: Economic Integration and Trade System of Asia Pacific.  
Shujiro Urata

- Key words for describing current global and regional economic situation
- COVID-19 Pandemic: export restriction, production subsidy
- Growing protectionism: particularly in the form of NTMs, trade remedies
- Increasing government intervention: government subsidy, industrial policy
- US-China conflict: tariff war, tech war, decoupling, managed trade
- Digital economy: digital trade, prevent digital protectionism, protection of privacy
- Global value chains (GVCs): robust and resilient
- Environment
- Energy

- To deal with these problems and achieve sustainable, resilient, inclusive, and dynamic economic growth
- Asia-Pacific economies need to establish and manage a free, open, transparent, rules-based economic/business environment, which will facilitate international/regional movement of goods, services, data/information, and people, contributing to expansion/intensification/diversification of GVCs, which have shown to be robust and resilient to COVID pandemic
- Important regional trade and investment frameworks
- RCEP: monitoring the compliance by the members
- CPTPP: expansion of membership, UK, China, Taipei, China, possibly other economies including Thailand, South Korea, Indonesia, etc. Strict application of accession requirement, e.g. e-commerce, state-owned enterprises, labor
- FTAAP
- Lead global discussions on digital trade rules, subsidy issue, etc
- Use APEC and G-20 meetings to discuss regional and global issues on trade and investment, respectively

- Need to deal with negative impacts of globalization and technological progress (skill-biased technical change) : unemployment, increased inequality
- Economic Cooperation/Assistance and Income/Asset Redistribution
- For developing economies:
- Economic cooperation/assistance from developed economies: International/regional economic cooperation: provision of soft (educational and legal systems, governance, etc) and hard (transportation, and communication systems etc) infrastructure, particularly development of human resources (education, training, digital skills) and MSMEs
- For developed economies:
- Economic assistance (trade adjustment assistance): temporary income compensation, human resource development (education and (re)training, digital skills), MSMEs
- For both developing and developed economies
- Income/asset redistribution

**Asia Pacific Cooperation in the Post Pandemic Era**  
**Brief Presentation by Simon Tay**

**Introduction**

Allow me to begin by thanking the organizers for this year CIRD-China and JEF-Japan. This is a long-standing and valued discussion among us in the region, organized by the JEF and each of us as partners in turn. I also wish to welcome to Toyoda-san as new Chairman and CEO of JEF. Much has been said, and I have just five minutes. So may I emphasize three words that perhaps have not been mentioned as much:

- Politics – geopolitical, but also bilateral among countries in our region, and within our societies.
- Transformation – going beyond efforts to recover ground but how to move forward, especially for digitalisation and sustainability, as issues that cut across sectors, to emerge stronger, better and greener from the pandemic.
- Agency – looking at how each country, even smaller ones, can try to find paths forward.

**Now and Next:**

- Re-opening for ASEAN and most in Asia. This has become clear for ASEAN after its recent summit. The re-opening comes after the bad surges of 2021, and it is predicated on the speed of raising vaccination rates. There are dangers from emerging variants of concern and it will be an important effort to re-open linked to efforts to harmonize standards and procedures and to use science and data while dealing with politics and sensitivity.
- Recovery and Resilience
- Reform and Transformation

**Pre-existing agenda:**

- **RCEP and CPTPP:** These are complete and ratifications are being received, so are applicants to the CPTPP. There is a need to make these agreements work and deliver. For the CPTPP, there is a need not only for consensus but to be assured that the quality can be maintained by any prospective new member, and by the existing members in implementation. This is being complicated by geo-politics and competition between the major powers, and by bilateral differences also involving trade.
- **BRI and infrastructure:** This too has been politicised by some, while others including Singapore have welcomed China's initiative. We are now seeing infrastructure initiatives by the USA and the EU, and this will change the context. There may be one competition, but hopefully rational competition with more alternatives, rather than Cold War thinking.
- **Asean Community and Centrality:** In this context, for its members like Singapore, ASEAN will be central. It can also be of help to its key partners, who share similar concerns, like South Korea. On some issues however ASEAN will need to accept and even encourage bilateral and unilateral initiatives – when the group as a whole may not be ready. ASEAN is important even more important amid the great power rivalry. But it cannot always answer all needs and initiatives, and there is a need for flexibility.

**Accelerating tensions:**

- **Sino-American conflict:** We can hope that the Biden-Xi summit can lead to a more stable relationship with “guardrails” and understanding of the sensitivities and legitimate concerns that each side has. There is little or nothing any one of us can do to influence this bilateral relationship. But we can hope not to make it worse by band-wagoning. Instead, I believe that countries must take a rational look at their national interests issue-by-issue and explain their choices accordingly.
- **IRBO:** There are concerns that the IRBO is not just unable to move forward but failing to even keep pace. There is a growing politicization of trade, using trade measures against others. There is also a need to avoid over politicization over decisions like 3<sup>rd</sup> accession to the CPTPP; we need to rationally focus on the quality of the agreement and ability and will of any party to accept and implement those undertakings.
- **Domestic constituencies:** There will also be need to adapt trade and economic integration to concerns of equality, opportunities and social changes within countries. Each country will need to give attention to concerns from their citizens and show the benefits from economic integration. It may also need to explain to partners the limits they face domestically and again find ways to resolve this based on rules.

**Next integration agendas**

- **Digitalisation:** This has been booming during the pandemic and has much promise. But there are insufficient agreed rules on many issues. There is a need for thining as a region like ASEAN being an interoperable unified bloc with a harmonized approach. There is also scope for Digital Economy Agreements (DEAs) with other partners, to help address issues and be potential pathfinders.
- **Sustainability and carbon:** There are economic and trade issues that arise from the increased attention and commitments to climate action. As more Asian countries commit to carbon neutrality their investment and supply chains across the region must adjust. There may also be concerns over the effects of Carbon-Based Adjustment Measures (CBAM) proposed by the EU or other carbon leakage policies set by our non-Asian trade partners. At the same time, opportunities for cooperation arise and Green Economy Agreements be another path-finding effort.
- **Bilateral initiatives:** The economic ties with other regions like the EU and with the Pacific Alliance in Latin America will be of importance. In themselves they are important and with Sino-American tensions, there is even more need for multilateralism and many partners and supply chains. Beyond these FTAs with DEAs and GEAs, there is a need for bilateral and mini-lateral efforts to move forward as path finders. These can augment the economic focus of the FTAs. In this regard, what I see is somewhat like the bilateral FTAs in the early 2000s that then were expanded into ASEAN-wide agreements. We may be in a similar time with the inability of major powers to agree, and the multilateral system is so stuck that bilateral effort are needed to serve as pathfinders in sustainability and on digitalization. As they progress, these can later be open to more partners and also integrated into economic trade and investment agreements.

**Singapore's Approach and Initiatives**

My small country has declared an endemic strategy to Covid-19 and has started to re-open both domestically and with travel lanes with key partners – of course with due regard to health and safety concerns. We have also had a private-public dialogue called the Emerging Stronger Taskforce to look at strategies and private sector alliances to move forward. The SIIA think tank I chair served as a knowledge partner to the Taskforce and we are happy to see that the region (especially key ASEAN economies), sustainability and digitalization are writ large as we move forward. Singapore is also actively discussing and negotiating DEAs and GEAs bilaterally, and in ASEAN we are supporting similar initiatives for sustainability and digitalization. There are many issues to manage both domestically and internationally, but we remain positive about our region and our abilities to not only recover but to transform to address issues of equity, competitiveness, openness and sustainability as we integrate.

**JEF APR**  
**3 December 2021**

Economic Integration and Trade System of Asia Pacific.

We hear a great deal about support for “principles for a rules-based, inclusive, open, and connected world order” and I have no quarrel with that, but we pass over “rules-based” with too little deliberation.

“Rules based” should not be interpreted as a single unchanging set of rules. Clarity and certainty are welcome, especially where business is concerned, but we must always expect innovation and change to pose challenges to existing rules.

Covid has made us all more aware of the importance of “resilience”, and we should be resistant to efforts to draw on that idea to promote “self-reliance” and withdrawal from international interdependence. Resilience is about management of change.

What is needed is a set of relationships which permits challenges and difficulties to be addressed discussed and resolved at least to a level which is tolerable to all relevant parties.

ASEAN is central not because of its geographical position but because “the ASEAN way” provides a model for maintaining relationships in the face of challenges to existing ways of doing things. The ASEAN way is essentially patient evolution of agreement on objectives and periodical reporting on by what means and with how much success individual parties have pursued those objectives. It may seem to be slow and ineffectual, but it and its results are enduring.

There is no international authority to create and enforce rules across the sphere of economic cooperation. Rules are “legally binding” if their rupture would be embarrassing and embarrassment usually comes at little cost.

No single economy can impose rules on the international system with any degree of validity. International rules have to be negotiated and agreed. They will inevitably prove to be inadequate in the face of technology and other changes. So the maintenance of rules, as much as the formulation of rules, has to be a matter of negotiation and agreement.

“Rules-based” has to be understood as “relationship-supported”.

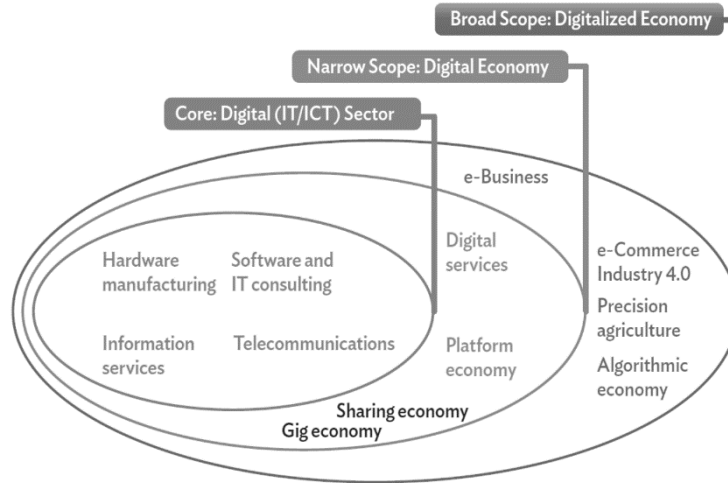


# **Economic Integration and Trade System of Asia Pacific**

Remarks by *Josef T. Yap*  
03 December 2021

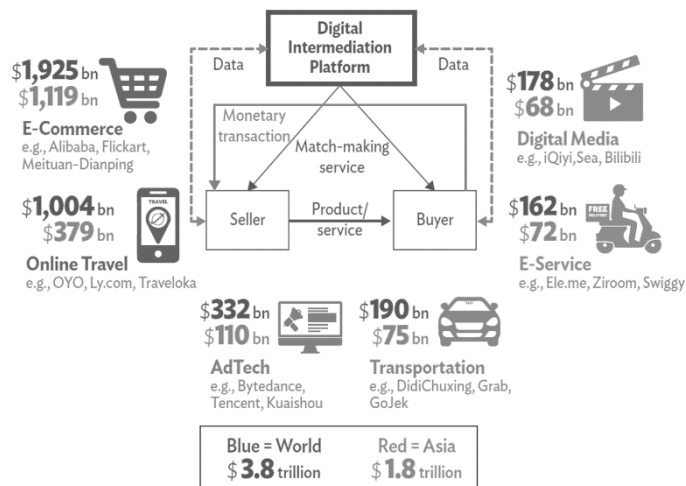
**Economic integration is being  
driven by digitalization**

**Figure 1.2: Three Dimensions of Digital Transactions**



ICT = information and communication technology, IT = information technology.  
 Source: Bukht and Heeks (2017).

**Figure 1.3: Digital Platform Revenues—World and Asia, 2019**



AdTech = advertising technology, bn = billion.  
 Note: Refer to Figure 8.4 in ADB (2021) for the country composition and the detailed sources.  
 Source: ADB (2021).

## Key Issues to be addressed

- Competition
- Labor security and protection
- Data access, privacy, and security
- Taxation
- Digital divide
- Regional cooperation must be strengthened to better address cross-border issues and challenges

감사합니다

Maraming Salamat!!!

Terima Kasih

\*\*\*

ありがとう

धन्यवाद

Cảm ơn rất nhiều

ຂອບໃຈຫລາຍໆ

謝謝你。

សូមអរគុណ

ကျေးဇူးတင်ပါတယ်။

THANK YOU !!!

## 8. 若手研究員の参加報告



三浦秀之

杏林大学総合政策学部准教授

1982 年生まれ。杏林大学総合政策学部准教授。上智大学比較文化学部（現、国際教養学部）卒業、早稲田大学大学院アジア太平洋研究科修士・博士後期課程（国際関係学専攻）修了。博士（学術）。アジア開発銀行研究所研究員、早稲田大学アジア太平洋研究センター助手、杏林大学総合政策学部専任講師などを経て現職。その間、日本国際問題研究所若手客員研究員、早稲田大学日米研究所招聘研究員などを兼任。専門は、国際関係論、国際政治経済学、地域主義・地域統合論。主な著書に『農産物貿易交渉の政治経済学』（単著、勁草書房、2020 年）、『揺らぐ世界経済秩序と日本：反グローバルリズムと保護主義の深層』（共著、文眞堂、2019 年）。

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### Asia Pacific Forum 2021 に参加して

昨年に続き、国際経済交流財団（JEF）若手研究者参加プログラムを通じて、12 月 3 日にオンライン上で開催されたアジア太平洋フォーラム（Asia-Pacific Forum 2021）にオブザーバーとして参加させていただいた。本シンポジウムは、JEF と中国改革発展研究院（CIRD: China Institute for Reform and Development）による共催のフォーラムである。今年度は、JEF が設立されてから 40 年目の節目であるばかりか、2003 年にシンガポールにおいて第 1 回の Asia Pacific Forum 2021 が開催されて以来、今年度は 20 回目のフォーラムとなる。コロナ禍の中で開催された同フォーラムは、本来であれば中国の海南島にて開

催される予定であったが、二年連続のオンライン・ウェビナー形式による開催となった。

「Process of Asia Pacific Cooperation in the Post Pandemic Era: Opportunities and Prospects (ポスト・パンデミック時代におけるアジア太平洋地域協力のプロセス：機会と展望)」と題された本フォーラムには、アジア太平洋地域で指導的役割を果たす各界の有識者がオンライン上で一堂に会し、豊富な経験に基づき共有する今後の地域課題解決に向けた活発な意見交換や討論が展開された。

会議開催に先立ち、豊田正和・JEF 会長は、コロナ禍におけるアジア太平洋地域において、世界貿易が保護主義化する中で、いかに保護的な措置を脱却し、ポスト・コロナへと導き、経済を回復させていくのか、経済統合と貿易システムをあらためてしっかりと構築することの重要性が言及された。同時に、そしてそのツールとしての CPTPP や RCEP の役割について論じられた。さらに、アジア太平洋の特徴は、政治体制、経済システム、宗教などの違いによる多様性であると指摘され、そのうえで、お互いを尊重することの重要性が述べられた。

中国側のホストである、迟福林 (Chi Fulin) CIRD 会長からは、2020 年に中国が APEC に加入してから 20 年が経過し、開放性は、アジア太平洋地域における重要な考え方であると論じられた。そのうえで、アジア太平洋地域の経済協力をいかに進めていくのかを考えたときに、経済統合、とりわけ FTAAP が重要な考え方であると言及された。アジア太平洋地域は、世界経済の成長および発展に貢献し、とりわけ中国がその中で大きく寄与している一方で、同地域は一方主義 (ユニラテラリズム) や保護主義に直面していると指摘された。その上で、迟会長は、開放的かつ包摂的なアジア太平洋地域を構築することの重要性を論じていた。そしてそれを実現する上で、FTAAP がそのツールとなり得ることが強調された。また、昨今の中国による地域統合において、RCEP を批准するとともに、CPTPP への加盟を申請したことから、いかにしてアジア太平洋地域の協力において、さらなる高い質の経済統合を実現するためにどのようにすればよいのか検討することが重要であると論じられた。また、COVID19 におけるクリティカル・サプライを維持するために、各国がお互いに協力することが重油王であると言及された。また、人口の高齢化、福祉の協力などにおいて、とりわけ、日中韓が協力することが大切であると述べられた。その上で、シンクタンクの協力、ならびに、教育、とりわけ青少年交流の促進の重要性が強調された。

#### 第 1 セッション「アジア太平洋の成長戦略」

第 1 セッションでは、原岡直幸氏 (JEF) がモデレーターを務め、「アジア太平洋の成長戦略」について各国からの知見が、5 名のパネラーによって話された。冒頭に、モデレーターの原岡氏から、(1) 現在の国の経済状況の評価をどのようにし、とりわけ、ワクチンの状況はどうか？また、構造改革を進めるためには高い経済成長率を確保する必要があるが、経済成長を保てるのか？ (2) 長期的に、デジタル化とクリーンテクノロジーの影響をいかに考えるのか？また、コスト・ベネフィットをいかに考えているのか？ (3) SMEs の

役割についていかに考えるか？また、とりわけスタート・アップの状況および役割をどのように考えるのか？という 3 つの共通の質問が投げられた。以下、セッションにおける議論の内容をまとめる。

まず、中国経済についてであるが、アジア太平洋地域の成長に貢献しているということであった。中国にとって重要な政策は、**Make China Open** であり、国家を開放することであり、ルール・ベースである。とりわけ中国が目下重視していることは、デジタル貿易であり、**CPTPP** への加盟である。そうした中で、地域協力においては、米国によるデカップリング政策が、問題をもたらしていることが言及され、さらに、米国と日本が積極的にインド太平洋構想を進めているが、これは地域に問題をもたらし、中国の参加がなければ、意味をなさないということが指摘された。

続いて、韓国経済は、比較的堅調に推移しているということであった。他方で、失業率、とりわけ若年層の失業率が非常に高いという。さらに、コロナのワクチンが、アジア太平洋地域において重要な役割を果たすとした一方で、アジア太平洋地域において不確実性が高まっていることが論じられた。特に、ワクチンが進展した先進国は、途上国の協力を高めるべきであると指摘された。また、サプライチェーンのレジリエンスを高めることの必要性、また、クリーンテクノロジーが非常に重要であると論じられた。さらに、開放的な **SMEs** は、地域協力を進める不可欠であり、イノベーションのエコシステムにおいて重要な役割を果たすことが指摘された。**CPTPP** についても論じられ、加盟国を拡大するべきであると語られた。また、ルール・ベースの枠組みが重要であり、それが保護主義の台頭を防ぐと論じられ、また、途上国が安定した成長を保つためには、**G20** の枠組みが重要であると指摘された。

ミャンマーでは、国民の 7% しかワクチンの接種が進んでおらず、ミャンマー経済は、**COVID19** のみならず、政変によって打撃を受けているという。また、そのみならず国際的な圧力から非常に影響を受けている。他方で、**COVID19** によって、ミャンマーのデジタル化が進み、携帯加入者が増えているという。とはいえ、インターネットの加入者は全国民の半分しかおらず、また、クリーンテクノロジーの導入が推進されているが、人材や技術の面で限りがあるという。ミャンマー経済において、99% が **SMEs** であり、**GDP** の 36% を寄与していることから **SMEs** がとても重要であるが、他方で、**SMEs** による経済的流れが不透明であると論じられた。

続いて、ベトナムでは、**COVID19** のコントロールをうまく行っているとのことで、とりわけ 8 月以降、ワクチンの接種率が高まり、ゼロ **COVID19** からウィズ・コロナに変化していることが論じられた。他方で、ベトナム経済を支える上で、大規模な財政政策が求められているが、それには限界があることが指摘され、ベトナム経済は、現在、金融政策に大きく依存しているという。とはいえ、ベトナムへの旺盛は **FDI** が続くとともに、ベトナムからの輸出も堅調で、経済成長を持続しており、今後も経済成長を維持することが見込まれるという。また、**CPTPP** と **RCEP** が、今後もベトナム経済に寄与することが論じられた。さ

らに、今後、ベトナムが経済成長を維持するうえで、経済のデジタル化や SOE の構造改革の重要性であるという点が指摘された。

最後に、コロナ禍のなかでインド経済は拡大し、COVID19 に企業やビジネスが適応し、今後回復することを見込まれているという。また、インドでは、ワクチンの接種率も高まっており、そればかりかワクチンを近隣国やアフリカ諸国に輸出していることから、相互協力の重要性が論じられた。また、インド経済においても、デジタル化と SMEs が、極めて重要であることが指摘された。

全パネラーからの報告が終わった後にコメントがなされた。まず、アジア太平洋の経済において、とりわけ、東南アジアにおけるサービス・セクターが困難に直面しているということが指摘された。人の移動の制限による影響も大きいという。他方で、東南アジアにおけるサプライチェーンならびに貿易は、安定した動きを示しているという。ただし、一人当たりの所得は減少していることから、各国政府による需要の創出が重要であると指摘された。今後、G20 は、インドネシア、インド、ブラジルなどの新興国がホスト国になることから、包摂性という考え方がより重要な側面になると指摘された。また、台湾では、COVID19 によって、経済界で、近年、環境に特化した経営を進めていることが紹介され、持続的発展および成長が重要なテーマであることが論じられた。さらにインドネシアでは、どのように効率的にデジタル・トランスフォーメーションやグリーン・イノベーションを進めていくのかという点で、コロナと戦う必要があり、現状、そうしたことに資源を割くことが難しいという点が指摘され、国際コミュニティからの投資と資金が求められると論じられた。さらに、タイは、財政的な余力が限られており、いかに効率的に資源を活用するかが重要であり、そのうえで、デジタル化が重要であるという点が共有された。

最後に、モデレーターの前岡氏から、多くの国においてコロナを克服しつつあり、経済的に安定している状況であると論じられた。一方で、当然のことながら不確実性があることが言及された。そのうえで、各国において、デジタル化、ルール・ベースの貿易投資枠組みの構築および推進が重要であるという点が共有された。また、いかなる経済政策においてもポジティブな側面とネガティブな側面が出てくることから、エビデンスをベースにした客観的な政策論議が重要であると論じられ、第一セッションが締めくくられた。

## 第2セッション「アジア太平洋の経済統合と貿易システム」

第2セッションでは、ZHANG Yunling 氏がモデレーターを務め、「アジア太平洋の成長戦略」について各国からの知見が報告された。冒頭に、アジア太平洋地域は経済統合を推進しているが、ポスト・パンデミックにおいて、経済成長を持続するためには、経済統合をさらに深化していく必要があることが指摘された。また、WTO における貿易投資の自由化、ならびに APEC の枠組み非常に役に立っており、また二国間、域内、多国間の貿易投資協定がアジア太平洋の経済に大きく貢献していることが論じられた。さらに、CPTPP がさらなる自由化を押し進め、デジタル貿易においてもうまく機能しているという。そうした中で、

一方的な保護主義が課題として浮上していることから、多国間による貿易の自由化が重要であり、高い基準の CPTPP および RCEP の存在が、あらためて重要になってくるということが指摘された。とりわけ、WTO にカバーされていないルールの重要性、特に、デジタル経済において重要であると論じられた。

続いて、コロナ禍の中で、各国政府によって自国経済を保護するために、輸出規制や補助金となされるとともに、保護貿易の拡大、とりわけ非関税障壁や貿易救済措置という形で広がっているという点が指摘された。また各国政府による産業政策や補助金を通じた経済への介入も高まっていることが論じられた。他方で、GVC は安定しているとともに、デジタル経済の構築に向けてデジタル貿易の枠組みの構築が重要になってきているという。そうした中で、こうした課題に対応する上で、包摂的で、持続的、強靱な、経済成長と経済統合を促進することが重要であると論じられた。それを実現する上で、加盟国が RCEP をどれだけ履行しているのかをモニタリングする仕組み、CPTPP の加盟国の拡大、そして FTAA の枠組みの構築に向けた検討、フォーラムとしての APEC、G20、WTO を促すことが引き続き必要であると指摘された。

最後に、COVID19 によって一時的に国境が閉じられていたが、国境が再開放されていることが言及され、アジアが再びつながることが、貿易のレジリエンスにおいて重要であるという点が指摘された。また、RCEP と TPP が進むにしたがって、これを評価していくことが重要であると論じられた。また、デジタルやグリーンテクノロジーの進展において、各国は競争し合っているが、いかに協力していくかが重要なテーマであると言及された。

全パネラーからの報告が終わった後に、コメントがなされた。まず、ルール・ベースという考え方は、単一で変更ができないものと考えるべきではないという指摘がなされた。そうした中で、域内各国による安定した関係性が重要であると言及する。安定的な関係性を実現する上で、地理的な要因ではなく、ASEAN ウエイのような考え方が重要になってくると論じていた。さらに、現状いかなる国際機関にも、ルールを強制するような組織はないため、国際ルールは交渉を経て、合意することが重要であると指摘された。

続いて、アジア太平洋の成長戦略をめぐる 3 つの点が指摘された。第一に、地域はこれ以上のあらたなる枠組みを求めておらず、これまで構築したものをいかに強化していくかが重要であると指摘していた。また、第二に、地域統合は、ハードな統合ではなく、ソフト面での強化、例えば SME におけるデジタル化の協力などが重要であると論じられた。そして第三に、多くの国において SME へ依存する一方で、統合的なアプローチがなされていないことが言及された。CPTPP において SME の詳細な章を設けており、今後、いかに SME 同士のコラボレーションを促進していくかが重要であると論じられた。

おわりに

アジア太平洋フォーラム 2021 は、昨年につき、世界的に COVID19 の感染拡大、とりわけデルタ株とともに、あらたにオミクロン株が各国経済を襲い、猛威を振るう中で開催され



た。オンラインを通じた各国の報告とディスカッションを通じて、現在の各国のコロナ禍における経済の状況を共有されたとともに、各国が、ポスト・コロナにおける経済をいかに回復に導くのかを考えるうえで非常に良い機会となった。

とりわけ、アジア太平洋地域における経済秩序および経済統合を考えるにあたり、アジア太平洋地域は、COVID19の感染拡大による経済的影響のみならず、各国の保護主義的な動きなど多くの課題を抱えている。一方で、アジア太平洋地域は、こうした課題がありながらも、域経済統合をめぐり大きな進展を遂げており、RCEPの発効が間近に迫るのみならず、アジア各国によるCPTPPへの参加の意思表示がなされている。

他方で、こうした二国間や域内におけるハード面での経済的な枠組みの構築は重要であるものの、より実質的な経済的な関係性を促すソフト面の枠組み、例えばデジタル経済に根差したフレームワークの構築などが、今後の重要な課題であると考えられる。とりわけ各国による報告の中でも、コロナ化でよりデジタル経済に向けた動きが進んでいることが共有された。一方、そうしたことを推進するうえで、アジア各国政府が苦しんでいることが、コロナ禍で財政的な余力が制限されているという経済状況であろう。いかにこうした取り組みを域内で協力し、突破していくかが、今後のアジア太平洋地域の大きな課題といえる。そのうえで、APECやASEAN+6などの多様なフォーラムの重要性があらためて問われると考える。こうした観点からも、アジア太平洋地域における多様な課題を踏まえながら議論をする場としてのアジア太平洋フォーラムの位置づけは極めて重要であろう。

冒頭でも記したように、本年度でJEFが40周年を迎え、そして、アジア太平洋フォーラムも20周年を迎える。コロナ禍で対面でのフォーラムの開催は叶わなかったものの、他方で、フォーラムにおける議論は熱を帯びていた。長い年月、この場で育まれた各国の有識者の信頼醸成が、結果として将来のアジア太平洋地域の秩序構築に導くと考える。最後になるが、本フォーラムの実現にご尽力をいただいた国際経済交流財団の皆様にご心から敬意を表するとともに、同フォーラムへのオブザーバー参加を推薦して下さった浦田秀次郎先生、またそれをお許し下さった国際経済交流財団の豊田正和会長、原岡直幸専務理事にご心から御礼を申し上げたい。

## 9. 活動と成果

### 1. 活動

当財団では、毎年世界の4地域に焦点を絞ったフォーラムやダイアログを開催している。アジア太平洋を対象としたこのフォーラムの特徴は、対象となる地域の15機関から毎年代表メンバーが集まり、継続して日本と周辺地域及び世界の関係について持論を述べ、意見をたたかわせる点にある。同地域のあるべき姿に近付けるため、アジア・オセアニア諸国・地域はどう協力し、諸課題の解決を図ることができるのか議論するこの取り組みは、今年で20回目を迎えた。初回から毎回参加するスピーカーも少なくなく、定点観測ができるこうした機会への参加では、いつもながらの意欲的かつ前向きな発言が相次いだ。

今年度は、中国の改革発展研究院 China Institute for Reform and Development (CIRD)が共催機関として名乗りを上げてくれたが、開催時期が先方事業の繁忙期に当たったため、通常の2日間に替え、今年度は1日だけのオンライン開催となった。

その結果、セッションは2つのみとし、参加者もプレゼンテーションを行う者とコメントをする者に分けることとした。最後はセッションごとに参加者全員でディスカッションを行った。以下は、その活動の要旨。

(1) 開催日時： 2021年12月3日(金) 11:30~14:30

(2) 開催形式

- ・参加者各自がネットにつなぐオンライン方式 (Zoom)
- ・英語のみによるラウンドテーブル・ディスカッション
- ・チャタムハウスルールを採用

(3) 共催機関：中国改革発展研究院

China Institute for Reform and Development (CIRD)

(4) 全体テーマとセッション

Process of Asia Pacific Cooperation in the Post Pandemic Era:  
Opportunities and Prospects

①Session 1: Growth Strategy of Asia Pacific

②Session 2: Economic Integration and Trade System of Asia Pacific

(5) 参加者

アジア太平洋地域15カ国・地域と関係機関代表(日本、中国、インドネシア、マレーシア、ミャンマー、フィリピン、シンガポール、タイ、ベトナム、韓国、台湾、

インド、オーストラリア、ニュージーランド、ERIA)、主催・共催機関代表・専門家等、聴衆 計 44 名

## (6) 趣旨

1) Session 1 では、「コロナ禍後のアジア太平洋地域間協力に向けた機会と展望」について、モデレーターから予め出された以下 4 つの課題に基づきパネリストたちによるプレゼンが行われた。

① コロナ禍においても見られる自国の経済成長

② デジタル化が自国に与える良い影響

③ グリーン成長にかかるコスト

④ 中小企業、とりわけスタートアップが経済構造改革の促進に果たす役割

その結果、各国とも不確実性はまだあるものの、コロナへの対応はうまくできており、経済も最悪の状態からは抜け出せているとの感触を得た。また、グローバル・サプライチェーンの促進と強靱化を図るためには、ルールに基づく貿易・投資制度が必要であり、デジタル経済は成長のドライバーになり、改革・自由化・協力への余地を与えるため重要だとの認識で一致した。デジタル化とグリーン成長に関する重要な政策決定には、事象に基づいた立案プロセスが必要。

スピーカーからの議論のポイントは次のとおり。

- 伝統的手法からデジタル化への調整は必要であり、コストもかかるが、農村と都市部の格差縮小など将来に向けた明らかなトレンドであり避けては通れない。
- 経済回復と新しい経済の循環にデジタル化はとても重要。アジア太平洋地域のデジタル経済を促進するルール策定のスピード化が必要。ビジネス界ではデジタル化したビジネスモデルが既に出来ているが、法制化・規定化対応が遅い政府が絡むとデジタル経済への前進に問題が生じる。
- デジタル化による失業懸念は、製造業も単純労働も簡単にはなくなるしないし熟練工にとっては生産性向上にもなる。製造業とデジタル化に対するバランスの取れた投資が大事。
- 国民の半数以上がデジタル技術を学ぶ機会もない農村部に住む国では、貿易面でデジタル化が役立っても、製造業もそこへ投資する余裕がなく、単純労働者の多くが失業している。雇用面を考えるとデジタル化のみに焦点を当てることはできない。
- 地域デジタル経済の発展には、規制体制（データの安全性、企業規模如何を問わない包括的政策、脆弱性のある個人資産の保護、モノポリを防ぎながらのイノベーション促進）、デジタル化に即したインフラ整備、物流、資本フローに

関する多くの議論が必要。

- デジタル化はコロナで加速したが、大きな情報格差を生じていることから、零細企業のデジタル化に注力する必要がある。
- 一般的にデジタル化は前向きな影響を及ぼしているが、ASEAN 及びアジアはもっと社会保障制度に注目し、デジタル化により非正規セクター労働者にも恩恵が及ぶようにすべき。

2) Session 2 では、「アジア太平洋地域の経済統合と貿易制度」について議論が行われた。出された主な意見は以下のとおり。

- 各国ともに経済成長の妨げというチャレンジを受ける今、より自由かつ平等な市場のために、従前からある ASEAN、APEC といった多国間枠組みの中で中小規模国が懸案事項を挙げ易くし、CPTPP や RCEP のように高い水準の協定を遵守し通すことが重要。急激に変化するデジタル経済に対応するため WTO でもカバーできていないルールの制定に尽力する必要がある。
- 持続可能な強靱かつ包摂的・機能的な経済を達成させるには多くの課題があるが、最も重要なのはグローバル・サプライチェーンの拡大強化と多様化に寄与するより良い環境－自由で開かれ、透明性の高いルールに基づく環境を作り、管理すること。また、先進国は自国で収入補助や人材開発、中小企業支援を行うのみならず新興国に対しても経済支援協力と貿易調整による支援をすべき。
- コロナ禍で急拡大したデジタル化に関する経済協定の締結など、もっとルールの設定が必要。気候変動に対する関心とコミットメントが高まり、EU 他アジア域外の地域との間で経済貿易上の課題が生じた一方、協定締結による協力の機会も想定される。米中の緊張がある中、EU や環太平洋ラテンアメリカ諸国との経済上の連携は重要。二国間協定が地域協定に発展したように、今後更に多くのパートナー国が入れば、貿易投資協定に統合していくことも可能。
- 経済連携の世界では、ルールを作って強制できるような国際的権威は存在しない。また、如何なる正当性があっても国際システムにルールの強制ができる単一経済は存在しない。既存の国際ルールは技術革新やその他の変化により変わるものであり、ルールの維持はその制定と同じく、協議し納得されるものでなければならない。「ルールに基づく」とは、「関係者間で支持されている」との意味に置き換えられる。
- デジタル化はルールに基づく競争であること、労働の保障と保護があること、データアクセス、プライバシーと安全保障が確保されること。国境を超えた課題とチャレンジに対処するためには地域協力の強化が必要。
- どの地域もサプライチェーンの一部であるため、域内でデジタル化、コラボレ

ーション、協力を進めることが大事。アジア太平洋は中小企業に依存する地域でありながら融合に向けてのアプローチをして来なかった。CPTPP にはとても良い中小企業の章があるので、その強靱化のためにも真に地域間協力と中小企業強化を行い、より大きな経済統合のツールとしていくべき。経済目標を達成させるために中小企業の競争力を促す必要はある。デジタル化は地域を分断する可能性も秘めている一方、経済活動を促進する力もある。

- 今まで殆ど触れられて来なかったが、経済統合にデジタル化は大変重要であり、現存の貿易の潮流に盛り込まれるべき。この点について米国のイニシアチブを問いたい。

## 2. 成果・反省点

共催機関とのコミュニケーションに通常より多くの時間を割く必要が生じ、結果として開催日数がいつもの2日間ではなく、1日になってしまったことは大変残念であった。せっかくオンライン上に集まった各国参加者との十分な意見交換の時間と、それをまとめて結論としての提言が出せなかったことも今年度の大きな反省点である。

ただ、制限のある中でそれなりに中身が濃い情報交換とディスカッションが行えたことは幸いであった。同じアジア太平洋地域に存在するものの、参加者の背景は様々であり、出身地の経済発展や開放の度合い、給与水準、企業規模はそれぞれ大きく異なる。そのような状況下でも、関心事項や課題の共有はできたと考える。

世界的には良いと思われる経済変革も、例えばデジタル化やエネルギーのグリーン化ではマイナス面を含む場合があることが指摘された。しかし、これらは進めずにはいられない大きな潮流であり、最適化できる道を探っていくしかない。その際にアジア太平洋諸国の連携や協力、お互いに学び合う関係は欠かせないものになる。

2回目のオンライン開催となった本アジア太平洋フォーラムは、移動が伴うリアル開催と比較すればスピーカーのみならず、オーディエンスにとっても参加し易いものになった。今後はコロナ禍の状況を判断しつつ、対面開催の機会を復活すべく模索し、従来ながらのより深い議論の場を再構築したい。また、渡航が難しい参加者や聴衆には引き続きオンライン参加もできるよう、道を開いておければと考える。

参加者アンケート（事項参照）では、開催時間は短かったものの、議論の質や率直性、現状を的確に捉えたポイントを取り上げたことを高く評価いただいた。一方、日程が長ければスピーカー間のディスカッションも聴衆との質疑応答・意

見交換がもっとできたのに残念だったとする向きもあった。

今年度はオンラインフォーラム終了後に同画面で調査票を表示し、そのまま回答できるよう工夫したが十分な回答が得られず、昨年度に引き続きオンライン開催で回答数を増やす必要性を痛感している。今後に向け、更なる改善策を考えていきたい。

フォーラムで議論された内容については、JEF ウェブページでの公表と報告書の送付に加え、より多くの方にエッセンスが届くよう、更なる活用法を検討していく。

## 10. 共催団体紹介



### **Japan Economic Foundation (JEF)**

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

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

URL: <https://www.jef.or.jp>



### **China Institute for Reform and Development (CIRD)**

China Institute for Reform and Development (CIRD), established on November 1, 1991, is a public research institution focusing on reform and development policy research.

#### **Reform Research**

Taking “recommending on China reform” as its bounden duty, CIRD has dedicated itself to independent and forward-looking research around important, difficult and hot reform topics, and has made great efforts to facilitate reform policy decision-making by submitting research and policy recommendation reports to relevant policy-making bodies. It has also organized various academic activities including *International Forum on China Reform* and regular expert consultative workshops on China’s reforms.

#### **Policy Consulting**

Equally dedicated to reform consulting services for the central and provincial government, CIRD has been commissioned with various reform consulting projects by a number of ministries and provincial-level governments.

#### **International Cooperation**

With the support of the government, CIRD has played a marked role in promoting academic exchanges on reform between China and other countries/regions by implementing a large number of multilateral and bilateral international cooperation projects, and has established academic exchanges with research institutions of more than 20 countries/regions.

#### **Education & Training**

As one of the first national training bases for China’s systematic reform, CIRD has devoted itself to training reform specialists with international outlook. It has offered a large number of training and education programs such as tailor-made reform training programs for government officials, executive programs for senior business managers, Ph. D program in reform research, MBA and MPA programs.

#### **Publication & Dissemination**

Besides publishing annual reports on China’s reforms every year, CIRD has published more than 350 volumes of reform research publications. It has also been running a specialized website [chinareform.org.cn](http://chinareform.org.cn), which has become an important platform offering reform updates and promoting online discussions of reforms.

## 11. 事務局

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2022年3月

一般財団法人 国際経済交流財団

JAPAN ECONOMIC FOUNDATION (JEF)

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