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區域  
整合

## 2020 年新一波亞太經濟整合 競合再起

■ 譚瑾瑜

台灣經濟研究院研究九所所長

繼 2018 年 12 月跨太平洋夥伴全面進步協定 (CPTPP) 正式生效，區域全面經濟夥伴協定 (RCEP) 於 2019 年 11 月的 RCEP 高峰會中正式宣布達成協議，雖然談判成員之一的印度宣佈不加入，然而仍為深化東亞區域經濟整合作出貢獻。可以預期的是，2020 年又開展新一波的亞太區域經濟整合競合發展。

以東協為核心的 RCEP，倘若正式生效，

可以整合並擴大五個東協加一的經濟效益，雖然 RCEP 因印度未參與而有所缺憾，然而 15 個東



### 本期重要內容

- ◎ 2020年新一波亞太經濟整合競合再起
- ◎ A Vision for APEC 2040(中)

亞地區成員，其 GDP 仍達約 24.4 兆美元的規模，涵蓋全球約 3 成的人口及 28% 左右的全球貿易總額，在已簽署完成的巨型自由貿易協定中，RCEP 涵蓋了全球第二及第三大經濟體，不容小覷。

雖然 RCEP 文本尚未公布，然就談判過程中之討論，其開放內容面向應未達 CPTPP。與 CPTPP 參與國家重疊、在 CPTPP 之後完成簽署卻又無法超越 CPTPP 開放程度，是輿論常質疑 RCEP 功能的主要緣由。唯在當前美中貿易戰前景不明之下，RCEP 涵蓋東協十國及中國大陸、日本、韓國的優勢，仍提供了跨國企業找尋消費市場、產業布局，以及建構產品供應鏈時，一個可能整合潛力市場及製造工廠的東亞自貿區。

事實上，RCEP 生效後，可能會進一步改變當前全球供應鏈及 RCEP 成員的產業分工模式，東協也有機會轉化為兼具生產優勢與內需消費潛力的市場，使東協各國成為世界經濟大國競相爭取的目標市場。透過三角貿易、中間財整合供給、具排他性的 RCEP 市場的交互影響，亞太及全球產業供應鏈將可能產生新的凝聚與排擠之雙重效果。

審視 CPTPP 與 RCEP 均參與的國家，包括日本、新加坡、越南、馬來西亞、汶萊等，在美中貿易戰長期化趨勢下，或有機會在重組產業供應鏈中連結亞太，吸引外資投入後搶食全球市場。其中，日本做為主導 CPTPP 的一員，除了將更開放的思維帶入 RCEP，長期耕耘東協市場、建構泰國成為日系車款的東南亞製造基地、長期與位於印尼的東協秘書處建立長期夥伴關係等經驗；新加坡作為東協櫥窗，是東協中發展良

好的已開發國家，長年與香港爭取全球最自由的貿易港，有機會在此時吸納香港外逃資金及各國進駐東南亞的外資；越南鄰近中國大陸，原本已是中南半島上台商及韓商之重要生產基地，在此波美中貿易戰下，成為中國大陸調整生產基地的重點考量國家之一。

展望未來，CPTPP 與 RCEP 是否能進一步擴大參與，將是決定其在亞太地區甚至印太地區重要性的關鍵。CPTPP 早已在 2019 年 1 月的第 1 次執委會確立新成員加入程序，對於其他持續就加入 CPTPP 展現興趣的經濟體表示歡迎，並重申 CPTPP 會員有意藉由願意符合 CPTPP 高標準的經濟體加入，以擴大協定。RCEP 雖未看到相關內容，然從《RCEP 談判指導原則與目標》中，亦曾表示歡迎東協 FTA 夥伴或外部經濟夥伴加入的文句，倘若可以擴大參與持續深化，並進一步研擬擴大開放之可能性，趕上 CPTPP 的開放水準，才有機會與 CPTPP 平起平坐。

最後，彼特森國際經濟研究所 (PIIE) 曾模擬 RCEP、TPP、CPTPP 等生效對於各國實質所得及出口之影響，模擬結果顯示 RCEP 生效對全球及區域內的經濟效益大於 CPTPP，主要原因係為 RCEP 包含全球第二大經濟體中國大陸所致。而 2019 年 1 月 PIIE 報告亦顯示，中國大陸若參與 CPTPP，中國大陸實質所得效益將增加 2,980 億美元，大於加入 RCEP，基於此結果，此報告建議中國大陸應考慮加入 CPTPP。中國大陸是否在 RCEP 生效、美中第一階段協議完成後，重新思考加入 CPTPP 的可能性，應當加以關注後續發展。

(曾經刊載經新聞)

# A Vision for APEC 2040( 中 )

■ Tan Sri Rastam Mohd Isa; Mr Brian Lynch;  
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Dr Vo Tri Thanh

## 2、IMPLEMENTING THE VISION

**APEC's regional integration agenda must demonstrate a strong collective commitment to sustainable and inclusive economic growth.**

Sustainability and inclusiveness are already highlighted as necessary features of economic growth in the APEC Strategy for Strengthening Quality Growth, endorsed by Leaders in 2015.

Sustainability is arguably the greatest existential challenge facing humanity today. It is an issue that intersects with a wide range of policy areas including social policy, environment, energy, health, food security, oceans, science and innovation, technology development and application, environmental goods and services. APEC already has work programmes in many if not all of these areas, and should build on these by ensuring that a sustainability lens is built into each programme.

Global warming and climate change are widely acknowledged as the greatest challenge to sustainability. A serious commitment to

sustainability must imply active support for global efforts to address these issues.

The Pacific Ocean that connects APEC economies is one of the most important repositories of resources that are critical for the sustainability of the planet. Addressing sustainability issues in the Pacific Ocean is becoming urgent and needs to be prioritised. APEC economies should accept a collective responsibility for this as the principal custodians of these resources.

APEC must:

- Ensure that a sustainability framework is built into its programme areas;
- Provide leadership for global climate change and environmental initiatives;
- Ensure that its sustainability initiatives contribute effectively to the Sustainable Development Goals agreed by the United Nations in 2015;
- Commit to mutual review by its members of their individually determined climate change commitments, through a shared individual action plan process; and

- Build on existing APEC work on oceans to develop, support and contribute to work programmes addressing key sustainability issues in the Pacific Ocean.

Inclusive growth has unrestricted access to economic opportunities for all sections of society at its heart.

The inequalities and inequities arising from inadequate attention to inclusiveness generate political and social tensions that can undermine commitments made by APEC economies in pursuit of regional prosperity.

Experience has shown that open, well-functioning, transparent and competitive markets have a strong positive impact on economic growth and can provide a wide range of increased economic opportunities. That is not, however, sufficient to ensure that the benefits of economic growth flow through to all sections of society. This is because barriers exist in all APEC economies that serve to restrict or deny access to these opportunities for substantial groups in society.

These issues should be addressed in APEC by:

- Further developing its structural reform agenda to place increased emphasis on the removal of barriers to participation in the economy by women, youth, MSMEs, indigenous communities, the disabled, and communities in rural and remote areas;

- Incorporating an inclusiveness dimension in APEC work programmes and agendas on policy areas of central importance to achieving full economic participation by all sections of society;
- Identifying and agreeing a suitable range of indicators of inclusiveness, which taken together can provide a useful portrayal of progress in this important area, and can be reported as such on an annual basis for all APEC economies.

## **APEC's future agenda must give high priority to continued structural reforms**

While trade liberalisation has been central to growth in the APEC region to date, the fundamental norms that have historically underpinned liberalisation efforts are no longer sufficient by themselves to drive growth and trade forward. Maintaining future momentum will also be critically dependent on meaningful structural reform in member economies, in order to:

- Boost productivity through operation of open, well-functioning, transparent and competitive markets;
- Encourage the use of economic instruments to support sustainability objectives;
- Identify and remove barriers to full economic participation by all segments of society.

Structural reform embraces the policy and regulatory changes required to ensure that the potential for economic growth is realised. Specifically, the APEC structural reform agenda includes competition policy, regulatory reform, corporate governance, public sector governance and strengthening economic and legal infrastructure. It can and should extend to ensuring that reforms are consistent with and support inclusiveness and sustainability objectives.

Acceptance of the benefits of structural reform is an essential prerequisite for more effective progress in liberalising cross border flows that have hitherto proved relatively resistant to liberalisation, notably services trade, agricultural trade, and foreign investment.

A strong commitment to deeper regulatory reform cooperation will be central to improving connectivity and infrastructure, and to unlocking significant growth potential in APEC services markets and through the use of digital technologies.

The current mandate of the Renewed APEC Agenda for Structural Reform (RAASR) expires in 2020.

PECC recommends that APEC replace RAASR by a successor agenda that:

- Promotes structural reform to achieve well functioning, transparent and competitive markets;

- Recognises the importance of structural reform for progressing liberalisation, facilitation and expansion of services and agricultural trade, and in facilitating the freer, more efficient flow of foreign investment;
- Embraces a strong commitment to deeper regulatory cooperation and development of compatible standards to improve connectivity and efficient investment in infrastructure;
- Underlines how structural reform can contribute to the achievement of APEC's inclusion and sustainability objectives;
- Enhances the region's capacity to respond to opportunities associated with digital technologies, including by
  - recognising the importance of competition in key sectoral markets such as telecommunications as a prerequisite for capturing the full benefits of the digital technologies.

### **APEC must prioritise policies and policy frameworks to harness the positive potential and address the disruptive impact of digital and other disruptive technologies.**

Newly developed technologies (digital, biological, material and others) have the potential to greatly improve living standards in APEC economies. At the same time, there are significant distributional and displacement implications associated with these technologies.

APEC members must cooperate in

developing frameworks and understandings on best practice to assist member economies in adopting and managing disruptive technologies. Such initiatives should support technological innovation and assist smaller firms to adjust to, and benefit from, changing and expanding markets, while taking full account of the social and ethical implications of the new technologies.

In particular, APEC is now faced by the urgent challenge of developing principles, frameworks and understandings for the utilisation of digital technologies that:

- Recognise the critical role of digital technologies in realising the potential of services to drive future economic growth;
- Recognise the vital contribution of digital technologies to competitiveness in all economic sectors;
- Facilitate interconnectedness and integration rather than fragmentation of markets across APEC economies, and between APEC economies and the rest of the global economy;
- Provide for participation of all sections of society in the opportunities and benefits from the spread of these technologies, so that they reduce disparities in opportunities rather than increasing them; and
- Facilitate cross border data flows consistent with meeting convergent regulatory objectives

in such areas as security, privacy and consumer protection.

APEC has already contributed important work in this area, notably its development of a Cross Border Privacy Rules (CBPR) system, the APEC Privacy Framework, and the APEC Framework on Human Resource Development in the Digital Age.

The APEC Internet and Digital Economy Roadmap (2017) sets out an extensive and formidable agenda of issues in APEC, including:

- Development of digital infrastructure;
- Promotion of inter-operability;
- Achievement of universal broadband access;
- Development of holistic government policy frameworks for the Internet and Digital Economy;
- Promoting coherence and cooperation of regulatory approaches affecting the Internet and Digital Economy;
- Promoting innovation and adoption of enabling technologies and services;
- Enhancing trust and security in the use of information and communication technologies (ICTs);
- Facilitating the free flow of information and data for the development of the Internet and Digital Economy, while respecting applicable domestic laws and regulations;



- Enhancing inclusiveness of the Internet and Digital Economy.

APEC must now urgently advance this agenda by:

- Prioritising the urgent development of understandings and consensus leading to development of a unified Asia-Pacific digital market by 2030;
- Fulfilling APEC Leaders' instructions under the APEC Action Agenda for the Digital Economy. This should be given the highest priority;
- Developing understanding of the potentially enormous economic costs of fragmentation of the digital economy, and providing a forum for dialogue aimed at avoiding this outcome;
- Supporting development of common priorities and responses by members on critical issues associated with related technologies such as artificial intelligence (AI), robotics, block-chain, and quantum computing, as well as other path-breaking technologies, including new biotechnologies;
- Facilitating development of members' capacity to appropriately regulate emerging technologies in ways that expand opportunities and minimise distortions on digital trade and data flows while at the same time meeting the legitimate objectives of regulation.
- Recognising that the Roadmap is a

living document, needing revisions and adjustments with the continuing advance of technologies as well as further work to develop understandings on key issues such as providing for adequate competition in the digital environment.

**APEC's agenda must include a strong emphasis on specific tangible actions to strengthen connectivity in all its dimensions: physical, institutional, regulatory, supply chain- and people-to-people.**

The rapid proliferation of supply chains and expansion of the digital economy has been paralleled by an increased focus on physical and regulatory connectivity between APEC economies, complementing the more traditional focus on connectivity through trade in goods and services.

Under the overarching guidance of the APEC Blueprint on Connectivity 2015-2025, APEC economies are committed to tangible actions to strengthen physical,

institutional, and people-to-people connectivity, with the objective of achieving a seamless and comprehensively connected and integrated Asia Pacific.

APEC's work on infrastructure should:

- Emphasise the need for regulatory environments to ensure that infrastructure

developments are of high quality, cost effective, and broadly beneficial in achieving the desired connectivity objectives;

- Ensure that infrastructure projects among APEC economies give due consideration to the imperative for interconnection across the APEC region, by giving particular attention to issues of standards and inter-operability.

Significant progress has been made within APEC in physical, institutional and people-to-people connectivity for commercial purposes. This progress should be continued and broadened to include initiatives to promote:

- Connectivity between policy-making bodies with responsibility for issues with important region-wide ramifications, such as climate change and the digital economy;
- Connectivity improvements that will facilitate more efficient flows of goods, services, capital and people;
- People-to-people connectivity for cultural, educational and social purposes;
- Cooperative educational programs to help build an Asia-Pacific community;
- Tourism that supports development consistent with sustainability objectives, with particular emphasis on delivering benefits to less developed areas.

## **APEC must intensify efforts to fully achieve the Bogor Goals of free and open trade and investment, with particular emphasis on components of the agenda where progress has been lagging.**

Progress on services trade and investment has lagged behind progress on manufactured goods tariffs. Yet these two areas today offer some of the greatest potential for driving economic growth. Governments need to be convinced not only of the economic benefits of services and investment liberalisation, but also that an acceptable balance can be struck between international commitments and domestic policy autonomy, and that the social and political economy effects can be managed to facilitate broad political acceptability.

In the APEC Services Competitiveness Roadmap (ASCR) member economies have adopted an initiative with the potential to drive a concerted set of actions toward mutually agreed targets to be achieved by 2025. APEC should:

- Complement the Roadmap by programmes, including case studies and exchanges of information and experiences, designed to increase the level of confidence of governments in relation to services trade liberalisation;
- Begin consideration of next steps to follow the projected ending of the ASCR in 2025.



APEC updated its Non-Binding Investment Principles in 2011. Since then a number of controversies have arisen over issues with the potential to inhibit or even derail cross border investment flows. APEC members should:

- Reaffirm commitment to a further updated set of APEC's Investment Principles that address these controversies, including on issues such as investor-state dispute settlement, technology transfer, intellectual property protection, and practical aspects of non-discriminatory treatment of foreign investors.

In relation to goods trade, average tariffs have been successfully reduced to relatively low levels in the APEC region. But substantial tariff peaks remain, most conspicuously in agricultural trade, which has proved particularly resistant to liberalisation. Non-tariff barriers not only remain significant but have actually been increasing in recent years, and an effective overall approach to reducing non-tariff barriers has yet to be developed, despite repeated calls from the business sector.

APEC members should

- Recognise that effective action to address tariff peaks and the continuing impediments to trade posed by non-tariff barriers must form an important part of APEC's on-going

agenda for achieving the Bogor goals.

- Explore the potential for its work on structural reform to contribute to achieving the Bogor goals in these areas.

Intellectual property has emerged as a central issue in the current trade conflict, and has been one of the most contentious issues in recent trade negotiations. It has become a highly strategic issue given the rate of technology development.

APEC members should:

- Identify areas of concern in existing intellectual property rules, including areas of special interest to developing economies;
- Build understandings on ways to address the concerns and to appropriately develop these rules for the 21st century in ways that are informed by empirical evidence and that maintain an effective balance between the requirements for current and future innovation. Setting IP rules at levels that are neither too weak nor too strong will ensure that innovators and creators benefit from the provision of optimal incentives for dynamic innovation and creativity, on the one hand, and that other members of society benefit from early accessible direct economic welfare gains on the other.

In cases where domestic regulation

plays a significant role in restricting trade and investment, progress can be facilitated by working toward regulatory coherence based on agreed principles on issues such as competition policy, corporate and public sector governance, and strengthening economic and legal infrastructure, which can then be applied, as appropriate, in individual jurisdictions.

APEC should:

- Utilise the potential of APEC's structural reform agenda to contribute to achievement of the Bogor goals by developing common understandings on steps to enhance regulatory coherence among APEC economies.

### **APEC must provide strong proactive support for a dynamic multilateral rules based trade and economic system**

An open, transparent, inclusive, non-discriminatory and rules-based multilateral trading system provides an essential framework for pursuit of a dynamic regional economic integration agenda and sustained economic growth.

The WTO has underpinned the expansion of global and regional trade by providing an extensive range of market access concessions and trade rules supported by a widely-used

and respected dispute settlement system, and an embedded set of norms underpinning a trade environment characterised by absence of discrimination, increasing openness, predictability and transparency, enhanced competition, added benefits for less developed economies, and support for environmental protection.

Today the WTO needs rejuvenating to withstand and transcend the challenges it is currently facing. Multilateral rules need to be updated to reflect the realities of 21st century international trade and the range of legitimate interests of all member economies. Gaps in market access commitments need to be addressed more effectively, the dispute settlement system needs to be preserved and enhanced, and members need to renew their commitments to multilateral trade norms.

APEC can lead the way by:

- Leaders working to develop a common understanding and appreciation of the norms of the system;
- Reaffirming the support of APEC economies for the rules-based multilateral trading system;
- Addressing longstanding issues and new ones as they arise, and responding to the current threats to the multilateral trading system, including by contributing to defining a

new WTO work programme;

- APEC members proactively participating in emerging plurilateral groupings in the WTO while also supporting a longer-term goal of eventual multilateralisation of agreements reached in these groupings;
- Supporting on-going technical work in areas where forward momentum exists, for example on fisheries subsidies;
- Contributing to development of proposals for reform of the WTO, consistent with the WTO's fundamental principles;
- Strengthening its own consultative mechanisms and seeking to build common understandings to avoid and resolve trade disputes between members.
- Developing regional and sub-regional trade architectures that serve as benchmarks for the multilateral system.

**APEC should be a strong pillar of open, rules-based regional economic arrangements in goods, services, investment, and e-commerce, as well as supporting technical assistance and capacity building.**

Trade liberalization, particularly the dramatic reduction in tariffs on manufactured products among APEC economies, has been a powerful driver of the region's economic growth and dynamism to date. Supported by technological developments, this has facilitated

the growth of extensive FT based in the region.

These value chains continue to evolve.

In the face of new threats to the global trading system, APEC must:

- Remain outward-looking and support the spirit of open regionalism;
- Preserve its achievements to date and ensure that forward momentum continues to achieve the full potential of an open and deeply integrated region;
- Continue to encourage regional initiatives that support this forward momentum, including the Comprehensive and Progressive Trans Pacific Partnership (CPTPP), the Regional Comprehensive Economic Partnership (RCEP), the Pacific Alliance, and other bilateral and plurilateral agreements;
- Continue to work towards a Free Trade Area of the Asia Pacific (FTAAP), as the eventual organising framework for regional integration initiatives;
- Ensure that all elements of this evolving trade architecture support greater transparency, openness, competitiveness and the ultimate fulfilment of the Bogor goals;
- Ensure that all trade initiatives by APEC member economies are fully consistent with and supportive of WTO obligations, understandings and disciplines;
- Maintain and further develop robust work programmes on trade and investment,

with a particular emphasis on addressing “21st century” and “next generation” trade issues, aimed at contributing inputs to trade policy development in individual members, the design of provisions in regional trade initiatives including the eventual FTAAP,

and the formulation of new or updated multilateral trade rules;

- Collectively encourage well-designed pathfinder initiatives that support deeper connectedness and openness.

### 意見箱

◎「中華民國太平洋企業論壇簡訊」係由太平洋經濟合作理事會中華民國委員會出版，為國內產官學所組成的非營利性區域經濟合作組織，對於本刊物內容有任何指教者，請逕洽本會編輯部主編陳文彬（分機 518），更改收件資料請洽劉芸甄小姐（分機 545）

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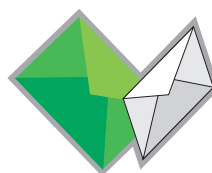
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