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國內
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區域
整合

RCEP 談判上充滿詭譎多變的氣氛： 中國、印度與日本的經貿戰略較勁

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印度近年來對 RCEP+6 談判特別展現經貿談判的話語權，迫使中國亮出排除印度、澳洲、紐西蘭的底牌。印度對 RCEP 成員國有超過 1,000 億美元的貿易逆差，幾乎佔其貿易逆差總額的 64%，其中僅中國就佔了絕大多數，印度最不希望加入 RCEP 後繼續擴大與中國的貿易赤字。而在 RCEP 的經濟體中，中國唯獨沒有與印度和日本簽署自由貿易協定，日本又是 CPTPP



本期重要內容

- ◎ RCEP談判上充滿詭譎多變的氣氛：中國、印度與日本的經貿戰略較勁
- ◎ A Vision for APEC 2040(下)
- ◎ 韓國公布監理沙盒施行半年成果報告將加強社會共識與區域衡平發展

的領頭羊，這些現象意味著未來的 RECP 勢必需要跨越更多障礙。

《區域全面經濟夥伴關係協定》（Regional Comprehensive Economic Partnership, RCEP），2013 年 5 月正式啟動，通過削減關稅及非關稅壁壘，建立 16 國統一市場的自由貿易協定，涵蓋貨物貿易、爭端協調、服務貿易、投資、知識產權、電子商務、中小企業、電信八大領域共 18 章節內容，在東盟成員國和東盟自由貿易區夥伴之間達成「現代」、「全面」、「高質量」、「互利」的經濟夥伴關係協議。不過，無論 RCEP+1（東協 + 中國）、RCEP+3（東協 + 中國、日本、韓國）、RCEP+6（東協 + 中國、日本、韓國、印度、澳洲、紐西蘭）等談判進度一延再延，受到近年來全球貿易情勢走向保護主義的情緒下，RCEP 年底恐難達成協議，讓主導多年的東協 10 國感到無奈。

涵蓋 16 國的 RCEP 畢竟是亞太地區最大的多邊自由貿易協定，參與國佔全球人口的近一半，佔全球 GDP 的 34%，世界貿易的 40%。在 2019 亞洲金融論壇上，該區域被認為投資回報率最高。據悉，中國為加強自身的主導性，近日在泰國提出排除印度、澳洲與紐西蘭的「東協 +3」替代方案，即由東協 10 國與中國、日本、韓國 3 國組成自由貿易協定，藉此對印度施加談判壓力，因為印度政府仍採取強硬姿態，並設法強迫紐、澳兩國表態，但東協內部成員卻對中國的強勢和美國印太戰略的主導表達疑慮，擔憂東盟是否還具有 RCEP 的主導地位。

● 印太戰略成形：印度積極擴展在 RCEP 的經貿話語權

印度正在南亞崛起，被美國視為在該地區制衡中國的一支重要力量，中國希望在美國對大多數亞洲國家施加開放市場的壓力之際，加速推動 RCEP 談判。然而，中國當局年來強勢推動的一帶一路（B&R），使印度擔心中國商品將可能淹沒印度市場，使印度國內製造商陷入困境，因此始終無法與其他 RCEP 成員達成共識，也無法同意 RCEP 談判中對 90% 貿易商品項目實行零關稅的提議。印度總理莫迪（Narendra Modi）在 RCEP 談判議題之所以敢於對中國態度強硬，因為先前印度國會大選中，執政的印度人民黨（BJP）再次狂勝，而且成績比上一屆選舉更好，讓莫迪更能施展印度人民對中國經濟崛起及壓制巴基斯坦的仇恨心理。

到 2024 年、也就是莫迪第二個任期之內，印度人口將超過中國，成為世界第一人口大國，經濟規模超過英國位居世界第五，可預期印度在地緣政治領域將有更多動作，一吐多年來被中國視為小弟的不滿。是以，RCEP 的經貿談判領域正是印度對中國施壓的跳板，何況這個國際戰略大棋盤的背後還有美國、日本的奧援。

在 RCEP 的經濟體中，中國唯獨沒有與印度和日本簽署自由貿易協定，這就意味著談判中印、中日的協定需要跨越更多障礙，但中國與日本、印度兩國在 RCEP 中仍分歧不斷，處處體現出不信任。印度不願降低進口商品關稅，其他國家也沒有開放服務業的意願，服務貿易自由化爭議將是 RCEP 今年底無法達陣的關鍵原因。

印度向來重視 RCEP 談判過程中的服務業，但東協多數國家並無太大意願與印度探討服務貿易自由化的議題。而印度向來是各種國際經貿談判的高手，深知透過參與 RCEP，從服務貿易自由化中獲益，尤其美國工作簽證的收緊及歐盟境內保護主義情緒蔓延，印度急需一個新的大型貿易市場，來吸收其服務貿易的出口。

● 捍衛印度製造：印度對中國的貿易赤字表達毫不妥協的態度

印度國內對 RCEP 的顧慮，筆者歸納起來有三個面向：首先，RCEP 雖然是巨大的市場機遇，但也可能會進一步擴大印度貿易逆差，印度一方面覬覦 RCEP 新興市場及該區域中產階級帶來的機遇，另一方面擔心假如繼續降低關稅，擴大市場自由化，那貿易逆差可能會更嚴重，國內經濟恐怕會更進一步惡化；其次，印度亟欲處理對非關稅壁壘的成本，其中特別指出是中國使用非關稅壁壘，如複雜的產品認證過程，標籤標準，海關清關，裝運前檢驗和進口許可，阻礙了印度進入中國市場；第三，印度希望在 RCEP 內部建立針對印度保障條款，在自由貿易協定範圍內，應規定在達到相關產品的數量或價格觸發時援引保障措施，以防印度國內產業受損。

印度在 2014 年也高喊「印度製造」，關注汽車及其零部件、航空技術、生物技術、食品加工、紡織和服裝、製藥產品、皮革製品、IT 產品等。上述產業在日本、南韓及新加坡的協助之下，在亞洲地區存在著廣泛國際生產網絡。長期而言，印度參與 RCEP 將進一步促進知識和技

術轉移，印度的出口潛力也會得到顯著成長，甚至還能改善貿易逆差。尤甚，印度與中國存在嚴重的貿易逆差，中國必須承諾為印度商品進入中國市場提供更多的便利措施，印度也希望中國能加快投資工業園區的增長。RCEP 部長會議就貨物貿易、服務貿易、投資保護、衛生和植物衛生措施、標準技術法規和合格評定程序、電子商務等議題進行了深入討論，希冀推動各方完成年底一籃子成果，並實質性結束談判。

● 中印較勁下的日本：儼然成為 CPTPP 與 RCEP 的橋樑

亞洲各國過去並不熱衷於區域經濟整合，區域貿易協定的數目也屈指可數，其中僅有東協自由貿易區（ASEAN Free Trade Area, AFTA）為較具規模的 FTA。大約在 2000 年之後，國際政經情勢及區域經貿組織的興起，帶動亞洲各國積極投入區域經濟整合，特別是雙邊經貿協議的簽署。由於美洲及歐洲較早投入區域經濟整合，在整合程度不斷深化下，對於亞洲國家自然會產生示範效應，當然也產生被摒除在外的危機心理，於是亞太地區也搭上了區域整合的列車，此種骨牌效應（domino effect）近年來持續在擴散中，東協主導的 RCEP、美國主導的 TPP、日本主導的 CPTPP 及 APEC 主導的 FTAAP，都是基於上述骨牌效應所驅使。

RCEP 談判擬將取消關稅品種比例之貿易自由化率提升至約 90%，各方還考慮寫入到實現為止設置最長 20 年寬限期等顧及新興市場國

家的內容，可謂包容性十足，但包容性卻難以真正滿足各方的經貿期待利益。尤甚，日本主導的 CPTPP 已於 2018 年 12 月正式生效，簽約國之間 95% 的貨物實行零關稅。日本與歐盟的經濟及夥伴關係協定（EPA）也在今年 2 月生效，歐盟將取消約 99% 的日本進口商品關稅，日本也逐步取消約 94% 來自歐盟的關稅。這樣的高標

準，日本也同樣希望在 RCEP 中能有所達成。此外，日本尋求一項涵蓋服務和投資的全面和高質量的交易，而不僅僅是降低交易商品的關稅。

RCEP 當中擁有話語權的不只是中國，日本與印度的影響力也不容小覷。RCEP 日後的談判進程，恐怕會更加崎嶇。

（曾經刊載芋傳媒）



印度與日本在亞洲的地緣政治影響力，正默默趕上中國
圖片來源：WIKIMEDIA COMMONS

A Vision for APEC 2040(下)

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3、SUSTAINING AND ENHANCING APEC'S UNIQUE ROLE

As the only trans-Pacific institution with a broad economic mandate and a regional focus, APEC's contribution to the Asia-Pacific as well as the global economy has been vital, and is today more important than ever.

Over the past quarter century, the Asia-Pacific has become a vital and increasingly interdependent community, economically and socially:

- Average regional tariff barriers have fallen;
- APEC economies are trading intensively among themselves, with intra-APEC trade today accounting for almost 70 percent of exports and imports of APEC economies;
- Enormous flows of people criss-cross the region as a consequence of reduced political and legal barriers and increased infrastructure.

APEC today is a unique and critical part of the region's architecture. It has:

- Embedded across the region values and norms and a modus operandi that support an open rules-based economic order;
- Stimulated unilateral, bilateral and plurilateral actions, that have contributed significantly to economic growth, based on recognising the value of increasing interdependence, connectivity and regional value chains that were largely embryonic in the early 1990s;
- Provided an opportunity for governmental leaders at the highest level to meet to discuss economic and social issues on a regular basis.

The 1994 APEC Bogor Goals have been the organising framework that underpinned this significant progress towards a vision of a more peaceful, prosperous and open Asia-Pacific economy.

Advancing domestic reform under the APEC umbrella has been helpful in legitimizing reform and setting regional norms.

At the same time the APEC region has become progressively more central to the global economy:

- Comprising 60 percent of global GDP;
- Accounting for nearly half of global trade;
- Including the three largest individual economies in the world among its members.

With increased openness and deeper regional economic integration, the health of the global economy today impacts each individual Asia-Pacific economy as never before.

As some developing economies with higher growth rates have risen ahead of others in relative global weight over the past quarter century, the most important trend is that global economic power is becoming increasingly dispersed. In the future, it is likely that there will be no single dominant economy. This will place a high premium on collaboration and cooperation to assure the maintenance of sustained growth across all economies in the region by maximising economic opportunity and managing risks. The ability of APEC economies to work together to successfully address this challenge will be critical to the wellbeing of the global economy as a whole.

In the face of many disrupters and emerging challenges, the opportunity provided by APEC's unique form and modus operandi for robust and constructive dialogue is more, not less, important today to advancing a prosperous, peaceful regional and global order:

- APEC remains the only trans-Pacific institution with a broad economic mandate

and region-wide focus supported by broad and high level political commitment;

- To date that expressed political commitment to cooperation and dialogue has been central;
- APEC leaders and ministers must now renew that political commitment to cooperation and dialogue and reaffirm a clear articulation of APEC's value proposition that embraces all member economies;
- Senior officials have a key responsibility for maintaining the relevance, constructiveness and vibrancy of dialogue within APEC.

APEC's norms based on openness, voluntarism, consensus-building, concerted unilateral action, commitment to economic and technical cooperation and support for the multilateral system, and its modus operandi based on dialogue and collective promotion of best practice, are best suited to meeting the challenges beyond 2020.

The voluntary and non-binding modality of APEC recognizes the wide variation among APEC members in terms of size, strength, level of economic development and competencies as well as their readiness to undertake regulatory reform.

But APEC has importantly also provided for flexibility among members to undertake more ambitious arrangements through incubation and pathfinder initiatives. APEC

jurisdictions accordingly recognise the Trans Pacific Partnership (now CPTPP) and Regional Comprehensive Economic Partnership (RCEP) to be legitimate pathways to the realization of an eventual Free Trade Area for the Asia Pacific (FTAAP).

- APEC ministers and senior officials should actively encourage greater use of pathfinder initiatives, relating not only to trade and investment issues but to the full range of APEC's agendas including in particular issues relating to the digital economy.

The discipline imposed by the annual schedule of official meetings, ministerial meetings and leaders' summits has been critical to advancing APEC's agenda and work programme.

Leaders and ministers must continue to:

- Call for regular progress reports to drive results;
- Maintain the extent and quality of personal contact at the highest political levels through annual leaders' and ministerial meetings. This is critical to encouraging respect, understanding and a willingness to cooperate;
- Support the ongoing operation of a network of effective working groups and task forces on particular issues to collaborate and search for consensus among participating economies. While the topics considered are

subject to continual refinement, this model has been valuable as regional dynamics have evolved, and will be central in the future for identifying ways to progress work on emerging issues.

The time is opportune to consider refinements of APEC's organizational structure to ensure continued provision of the levels of collaboration and technical expertise that will be needed to advance the post 2020 agenda.

APEC Senior Officials should actively work on developing:

- A closer working relationship between the Committee on Trade and Investment (CTI) and the Economic Committee (EC), the two principal APEC committees, to ensure that cross cutting issues associated with the complex dimensions of the digital economy and technological developments, and the interdependence between trade reform and structural reform, are addressed in a coordinated fashion;
- Improved governance arrangements for APEC's work programmes on digital technology with a view to ensuring that work programmes are coherent and effective. This is now an urgent priority;
- Steps to ensure that work programmes of groups covering key sectoral areas (such as ICT, telecommunications, transport, energy,

education and skills) are better integrated into the broader APEC agenda.

In today's fast-changing world, regular reviews of APEC's agendas, working groups, and support services are essential to ensure APEC's continued relevance and effectiveness.

- There should be regular reviews of progress toward meeting the objectives that APEC sets for itself.
- Working groups should be regularly reviewed for their effectiveness and relevance of their agendas. Regular difficulties in attracting quora to meetings should trigger consideration of the need for continued existence of the group in question. APEC has agreed sensible rules to deal with such situations. They should be applied.
- APEC should avoid adding work programmes on issues that other international institutions are better equipped to handle. For example, international economic imbalances and the risks of debt-fuelled growth are issues of serious concern for APEC economies, but the comparative advantage in addressing them lies with institutions such as the G20, IMF, OECD and AMRO. Similarly, international public financing of infrastructure developments is best handled by international financial institutions. The APEC Finance Ministers' process should

reflect on the implications of these issues for the region and provide a link between APEC and the international institutions with primary responsibility for them.

- A lean, energetic Secretariat has served APEC well. Members should continue contributing to its effectiveness by making suitably selected and conveniently scheduled secondments.
- The Policy Support Unit (PSU) provides valuable support for the APEC process. Arrangements for financing the PSU should be placed on a more secure, longer term footing.

APEC must continuously strive to ensure effective communication of the importance and value of its agendas and the results of its work programmes, and to develop and maintain lively and constructive relations with its stakeholders.

- APEC should regularly review the effectiveness of its communications strategy.
- Widening the range of media interest in APEC is a challenge that must be continuously addressed.
- The strong working relationship that APEC has developed with ABAC and PECC should be matched by similarly strong working relationships with appropriate civil society groups and with academia.

韓國公布監理沙盒施行半年 成果報告 將加強社會共識與 區域衡平發展

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韓國政府在今（2019）年 1 月立法施行四種監理沙盒機制（규제샌드박스），包含「金融監理沙盒」、「資通訊（ICT）監理沙盒」、「產業融合監理沙盒」及「地方專業化特區」機制，於施行半年後在同年 7 月 16 日公告成果報告，未來監理沙盒將加強尋求社會共識與區域衡平發展。

韓國為推動「製造業創新 3.0」（제조업혁신 3.0）政策，強化產業創新與競爭力、重點發展人工智慧及物聯網，並打造友善法制環境來減少監管障礙。因此以鬆綁法規與鼓勵創新為目的，由韓國國務總理室於 2018 年初統籌各相關部會機關規劃全國性之監理沙盒機制，而於同年年底國會修正通過以下法律，泛稱「管制創新五法」（규제혁신 5 법）：

《資通訊融合法》（정보통신융합법），由「科學技術資訊通訊部」主管，建立「ICT 監理沙盒」，鬆綁資通訊相關規範為主要範圍。

《金融創新支援法》（금융혁신지원 특별법），由「金融委員會」主管，建立「金融監理沙盒」，作為金融規範鬆綁之依據。

《地區特區法》（지역특구법），由「中小企業創業部」主管，主要由地方政府提出並建立具地方特色的專業化特區，如共享經濟特區、能源特區等，透過特區鬆綁地方與中央法規，由地方政府主導、中央協助推動當地產業發展。

《產業融合促進法》（산업융합 촉진법），由「產業通商資源部」主管，就前述以外之產業建立監理沙盒機制。

《行政管制基本法》（행정규제기본법），鬆綁上述四個監管與行政程序相關法律。

在施行半年以來，成果顯示已受理 81 件申請案例，企業規模以中小企業佔 80% 為大宗，而申請之產業領域多集中於金融科技領域（46%）、其次為非特定領域（32%）、資通訊領域（22%），並以共享經濟、區塊鏈、大數據、物聯網、人工智慧、虛擬實境（VR）、5G 等創新產品或服務為主。在申請時程上，從受理案件至批准進行實證或發給臨時許可證允許在市場販售，僅須約 44 個工作天。而在法規鬆綁上，多數涉及法規命令與機關行政函釋層級。另外為鼓

勵創新業者申請監理沙盒，針對實證完成之產品或服務，將給予「優良採購產品」（우수 조달 물품）證明，政府機關可於採購平台上優先採購該產品或服務。

另外成果報告說明，由於許多創新實證與現行社會體制與規範造成破壞式衝突，例如「共享廚房」與現有《食品衛生法》規定餐廳須有獨

立廚房有違，或者消費者直接在家進行基因檢測（Direct-to-Consumer Testing, DTC）創新服務與現有醫療規範與體制不符等，韓國政府將透過客觀實證數據與宣導來尋求社會共識或使用其他替代方案來降低衝突。同時將於今年下半年由中央主導指定特定區域作為專業化特區，以衡平區域發展。

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）

◎ 歡迎由 CTPECC 網站，加入「太平洋經濟合作理事會中華民國委員會」Facebook 粉絲頁。

◎ 本刊將減少紙本印刷量，敬請訂閱電子報：<http://www.ctpecc.org.tw/publications/AddEmail.asp>

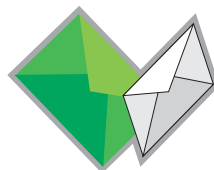
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