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Perception survey in the Philippines on APEC

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Perception survey in the Philippines on APEC

Francis Mark A. Quimba and Sylwyn C. Calizo Jr.



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Perception Survey in the Philippines on APEC

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PHILIPPINE INSTITUTE FOR DEVELOPMENT STUDIES

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Abstract

In 1993, the Asia-Pacific Economic Cooperation (APEC) published a report containing recommendations that recognized the economic interdependence and economic diversity of APEC economies and welcomed the challenge to achieve free trade in the Asia-Pacific. This came to be known as the "Bogor Goals." Nearing its conclusion in 2020, APEC sought a similar report that would guide APEC, which prompted the creation of the APEC Vision Group tasked to formulate a Post-2020 Vision for APEC. This study helped in the visioning process by providing an assessment of the perception of Philippine stakeholders. The results of the online perception survey showed that APEC's achievement of its economic goals is rated more highly compared to its environmental and social goals. Stakeholders are also more optimistic about APEC providing better trade and investment in the region than it is to achieving environmental and social scenarios. Further, stakeholders generally perceived that services needed increased priority than products post-2020. Interestingly, APEC's influence on shaping policies are weaker in government than the rest despite government being the prime participant in APEC. Also, Philippine stakeholders generally find that the APEC Business Travel Card is less beneficial. These results supported four recommendations. First, the limited awareness on APEC must be addressed. Second, Philippine stakeholders can maximize participation in APEC by adopting policies and best practices. Third, participation by Philippine stakeholders in seeking APEC project funding could be strengthened. Fourth, the requirements on the issuance of an ABTC for Philippine citizens could undergo a review.

Keywords: *Asia-Pacific Economic Cooperation, APEC, Post-2020 Vision, AVG, perception survey, Philippines*

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List of Abbreviations

ABAC	APEC Business Advisory Council
ABTC	APEC Business Travel Card
ACWG	Anti-Corruption and Transparency Experts' Working Group
AD	Automotive Dialogue
APEC	Asia-Pacific Economic Cooperation
ASEAN	Association of Southeast Asian Nations
ASF	APEC Support Fund
ATCWG	Agricultural Technical Cooperation Working Group
AVG	APEC Vision Group
BMG	Business Mobility Group
CD	Chemical Dialogue
CTI	Committee on Trade and Investment
CTWG	Counter-Terrorism Working Group
ECOTECH	Economic and Technical Cooperation
ECSG	Electronic Commerce Steering Group
EGILAT	Experts Group on Illegal Logging and Associated Trade
EPWG	Emergency Preparedness Working Group
EWG	Energy Working Group
FTA	Free Trade Agreement
FTAAP	Free Trade Area of the Asia-Pacific
GATT	General Agreement on Tariffs and Trade
GDP	Gross Domestic Product
GFCF	Gross Fixed Capital Formation
GOS	Group on Services
GPA	General Project Account

HRDWG	Human Resource Development Working Group
HWG	Health Working Group
ICT	Information and Communications Technology
IEG	Investment Experts' Group
IPEG	Intellectual Property Rights Experts Group
JPES	Junior Philippine Economic Society
LCMT	Low-Carbon Model Town
LSIF	Life Sciences Innovation Forum
MAG	Market Access Group
MSME	Micro, Small, and Medium Enterprise
MTS	Multilateral Trading System
NCR	National Capital Region
OFWG	Oceans and Fisheries Working Group
PASCN	Philippine APEC Study Center Network
PECC	Pacific Economic Cooperation Council
PIDS	Philippine Institute for Development Studies
PPSTI	Policy Partnership on Science, Technology, and Innovation
PPWE	Policy Partnership for Women and the Economy
SCCP	Sub-Committee on Customs Procedures
SCSC	Sub-Committee on Standards and Conformance
SMEWG	Small and Medium Enterprises Working Group
SOM	Senior Officials' Meeting
TBAM	Technical Board on APEC Matters
TELWG	Telecommunications and Information Working Group
TILF	Trade & Investment Liberalisation and Facilitation Account
TPTWG	Transportation Working Group
TWG	Tourism Working Group

Perception survey in the Philippines on APEC

Sylwyn C. Calizo Jr. and Francis Mark A. Quimba¹

1. Introduction

In 1993, the Asia-Pacific Economic Cooperation (APEC) published a report titled “*A Vision for APEC: Towards an Asia-Pacific Economic Community*” (APEC 1993a), which recommended that APEC should set a goal of free trade in the Asia-Pacific; commence immediately an extensive series of APEC trade and investment facilitation programs; adopt an effective dispute settlement mechanism; and, develop APEC’s own institutional infrastructure, among others. Recognizing the economic interdependence and economic diversity of APEC economies and welcoming the challenge to achieve free trade in the Asia-Pacific, the APEC leaders resolved to achieve these goals, which came to be known as the “Bogor Goals” (APEC 1994).

These events were followed by subsequent term reviews monitoring the progress of each economy towards the accomplishment of the Bogor Goals. The first review was done in 2010 at Yokohama, Japan (APEC 2010) while the second review was in 2016 at Peru (APEC 2016). As the Bogor Goals concludes in 2020, APEC in 2018, during Viet Nam’s hosting, initiated the formulation of a Post-2020 Vision for APEC (APEC 2017).

During the first APEC Vision Group (AVG) meeting held in Papua New Guinea in May 2018, the AVG discussed the progress made by member economies and of the region towards the fulfillment of the Bogor Goals. By the start of the second AVG meeting in August 2019, the AVG already had three key views on the Post-2020 Vision, particularly: APEC’s vision beyond 2020 should be people-centered; the core principles of APEC should be preserved and that growth and inclusion could be achieved with APEC’s free and open trade and investment; and, the main challenges for APEC would be from non-traditional security issues, and the emergence of the digital economy and technological advancements.

The Philippine AVG committee, through the leadership of the Department of Foreign Affairs and represented by Ambassador Manuel Teehankee, has convened representatives from government, business, and the academe to assist in formulating a Post-2020 Vision for APEC as perceived by Filipinos. One of the members of the Philippine AVG Committee is the Philippine Institute for Development Studies (PIDS), which is the government’s primary socio-economic policy think tank.

1.1 Objectives of the study

This study seeks to provide an assessment of the perception of Philippine stakeholders, particularly government, business, academe, civil society organizations, and the youth, as a contribution to the APEC post-2020 visioning exercise and related processes.

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Specifically, this study will:

1. Measure the level of awareness on APEC demonstrated by Philippine stakeholders;
2. Identify the perception of Philippine stakeholders on the importance, influence, and relevance of APEC to the Philippines; and,
3. Provide insight on what Philippine stakeholders envision for both the future of APEC and for the Philippines within APEC.

1.2 Significance of the study

This study would provide an assessment of the perception of Philippine stakeholders on APEC, which is substantiated by empirical data. Further, it provides Philippine stakeholders with a documentation of stakeholder insights to the AVG process and a better understanding of the Philippines' perception on APEC, which can be informative to Senior Officials representing the Philippines.

The perception survey gathered inputs from government, academe, and civil society organizations. The Philippines' participation and contribution to the AVG serves as the economy's effort to maximize participation in international trade agreements in order to achieve the Philippines' own vision in Ambisyon 2040. One of the challenges to the pursuit of international trade agreements has been the growing trend towards inward-looking policies and protectionism. This research, therefore, contributes to addressing this challenge by providing an assessment of the perception of Philippine stakeholders on the Philippines' participation and inclusion to APEC.

1.3 Limitations of the study

This study used an online perception survey to gather insights from Philippine stakeholders. Given that the medium of dissemination is online, particularly through e-mail, this study experienced some limitations. First, only institutions, agencies, and organizations that have an active e-mail address can participate. Second, accomplishing the survey requires a reliable internet connection, which some areas in the Philippines might not have access to. Third, while the authors have extended all efforts to ensure that stakeholder respondents are inclusive, the respondent database is limited only to existing directories available to PIDS and its networks.

2. The Asia-Pacific Economic Cooperation

This section provides a brief introduction about APEC, primarily by answering the questions on how APEC developed, what APEC has achieved, and what APEC has initiated for the development of a Post-2020 Vision for APEC.

2.1 How did APEC develop?

APEC began as an informal ministerial-level dialogue in 1989, which was participated in by 12 founding members, namely: Australia, Brunei Darussalam, Canada, Indonesia, Japan, Republic of Korea, Malaysia, New Zealand, the Philippines, Singapore, Thailand, and the United States. To date, APEC has grown to include 21 economies. Joining the 12 founding members are: China; Hong Kong, China; Chinese Taipei; Mexico; Papua New Guinea; Chile; Peru; Russia; and Viet Nam.

APEC celebrated a number of milestones since its formation in 1989.² For instance, APEC Economic Leaders outlined APEC's vision of "stability, security, and prosperity for our people" during the United States' hosting in 1993. This vision evolved during Indonesia's hosting in 1994 to "free and open trade and investment in the Asia-Pacific by 2010 for industrialized economies and 2020 for developing economies." This vision would eventually be known as the "Bogor Goals." This coincided with the Uruguay Round of the multilateral trade negotiations conducted under the General Agreement on Tariffs and Trade (GATT), which APEC is widely considered to have been significantly influential.

In 1995, APEC adopted the Osaka Action Agenda, which provided the framework that APEC economies can use to accomplish the Bogor Goals. The framework was anchored on policy dialogues and economic and technical cooperation among APEC member economies. In the same year, the APEC Business Advisory Council (ABAC) was also formed. ABAC serves as the business arm of APEC. The Osaka Action Agenda is complemented by the Manila Action Plan for APEC adopted during the Philippines' hosting in 1996. This was also the first time where collective and individual action plans from different APEC member economies was compiled. APEC eventually agreed in 1997 to update these plans annually.

From 1998 to 2002, APEC has discussed a number of issues on trade facilitation and other related advancements including the digital economy. The discussions led to the Blueprint for Action on Electronic Commerce, commitment to paperless trading, a mutual recognition arrangement on electrical equipment, the Action Agenda for the New Economy, the Shanghai Accord, and the Statement to Implement APEC Policies on Trade and the Digital Economy. During the same period, APEC has also introduced the APEC Business Travel Card (ABTC) and the integration of discussions on inclusiveness (women) into APEC.

After a decade since APEC adopted the Bogor Goals, a mid-term stock-take of progress was conducted. This would be followed by the endorsement of the Ha Noi Action Plan in 2006, which identified specific actions and milestones helpful in achieving the Bogor Goals. APEC also strengthened the APEC Secretariat during the same year.

In 2008, APEC introduced the social dimensions of trade by discussing how to reduce the gap between developing and development APEC member economies and introducing corporate social responsibility. This was echoed during the Singapore hosting in 2009 where APEC resolved to pursue a more balanced, inclusive, and sustainable growth. Notably, APEC launched significant policies that helped facilitate better business in the region, namely the Supply-Chain Connectivity Framework and the Ease of Doing Business Action Plan.

Furthermore, APEC committed in 2011 to pursue a seamless regional economy that addressed shared green growth objectives and advancing regulatory cooperation and convergence. This

² These milestones are based on APEC's history, see: <https://www.apec.org/About-Us/About-APEC/History>

initiated APEC's pursuit of environmental objectives, for in 2012, APEC adopted a list of environmental goods.³ APEC also recognized, in 2014, the importance of promoting a diversified energy supply. To this end, APEC member economies agreed to work towards doubling the share of renewables by 2030, including that of power generation.

Apart from the environmental dimensions of trade, APEC also enhanced discussions on regional connectivity in 2014 during China's hosting. For instance, APEC leaders endorsed the vision of a Free Trade Area of the Asia-Pacific (FTAAP) and the implementation of the APEC Connectivity Blueprint. The latter sought better physical, institutional, and people-to-people linkages in APEC.

Supporting the Micro, small, and medium enterprises (MSMEs) became a priority during Manila's second hosting in 2015 as APEC adopted policies that will help integrate MSMEs into regional and global markets. Further, similar policies creating a more inclusive region was adopted. These policies include building sustainable and resilient communities, developing human capital, and enhancing the regional economic integration agenda of APEC. This was supported the following years. During Peru's hosting in 2016 and Viet Nam's hosting in 2017, APEC committed to strengthen the ability of micro and small enterprises to compete in international markets.

Nearing the conclusion of the Bogor Goals in 2020, APEC sought a similar report in 2017 that would guide APEC's future. This objective prompted the creation of the AVG tasked to formulate a Post-2020 Vision for APEC. A series of discussions and stakeholder consultations occurred from 2018 to 2019 during Papua New Guinea and Chile's hosting, which led to the finalization of the post-2020 vision for APEC.

This section provided only a brief history of APEC using milestones that marked important achievements since its development since 1989. However, APEC's history stretches further to include more than just achieving free and open trade and investment. APEC has evolved and grown to be of greater importance in the Asia-Pacific. APEC had extensive influence not only in trade and investment but also in introducing structural reforms, regional economic integration, and the pursuit of environmental and social goals. *Quimba and Barral (2019)* discussed in detail the evolution of APEC and its role in Philippine trade and investment. They recognized that APEC has helped the Philippines, particularly in shaping the Philippines' business environment, despite APEC being a non-binding platform for member economies.

2.2 What has APEC achieved?

APEC's contribution to the region has been substantial⁴. Between 1989 and 2015, APEC has increased total trade of goods and services to USD20.0 trillion or an increase of more than 6.7 times. In contrast, trade by the rest of the world grew less by 5.6 times during the same period. APEC has also reduced average tariffs from 17.0 percent in 1989 down to 5.6 percent in 2014.

³ APEC first identified a list of environmental goods in 2012 during the Russian hosting. APEC recognized that trade and investment liberalization in environmental goods can help APEC access important environmental technologies at lower costs. A more detailed list can be found in: https://www.apec.org/Meeting-Papers/Leaders-Declarations/2012/2012_aelm/2012_aelm_annexC.aspx

⁴ The achievements of APEC described in this section is based on APEC's official website, see: <https://www.apec.org/About-Us/About-APEC/Achievements-and-Benefits>

APEC has always been an important platform towards trade liberalization in the region. Further, APEC's role in facilitating regional integration since 1989 has proven essential to promoting trade and economic growth in the Asia-Pacific. For instance, APEC has successfully lowered trade transaction costs by 5.0 percent, which translates to USD56.7 billion in savings.

APEC has also launched its Ease of Doing Business Plan in 2009, with the goal of making it cheaper, easier, and faster to do business in the Asia-Pacific. APEC economies were able to improve business by 14.8 percent across all areas of the initiative, namely: starting a business; dealing with permits; getting credit; trading across borders; and enforcing contracts. In 2015, it takes only 136.9 days for government to issue construction permits as compared to 169.7 days in 2009. APEC has reduced the process by more than a month. APEC has also empowered entrepreneurs by reducing the time it takes to start a business. In 2009, it takes 28.5 days but in 2015, this figure has been reduced to just 14.8 days. Costs to start a business also declined. From a figure of 9.8 percent of per capita income in 2009, it has plummeted to just 1.6 percent in 2015.

At the border, APEC has helped to reduce costs for importers and exporters by reducing customs waiting time from six to eight days to just four to five hours. APEC has done this by advocating the use of electronic processes. In addition, APEC also promotes trade in environmental goods, which represents a substantial amount of trade. APEC has made efforts to reduce tariffs on 54 environmental goods down to just 5.0 percent.

APEC has strengthened and advanced the Multilateral Trading System (MTS), improved the region's trade, and continued to make itself relevant in emerging global and regional issues. In addition, the [APEC Policy Support Unit \(2019\)](#) published a series of charts and figures that illustrate APEC's achievements and developments in the region in the past 30 years. Some of the publication's most interesting findings are:

1. APEC's population has grown by about 600 million people from 2.3 billion in 1989 to 2.9 billion in 2018 although APEC's share in global population dropped from 43.0 percent in 1989 to 38.0 percent in 2018.
2. APEC represents a large portion of world Gross Domestic Product (GDP) constituting 60.0 percent in 2018. The largest shares are from the United States (24.0%) and China (16.0%). It is noteworthy that China's share increased by eight times since 1989.
3. APEC's share of world trade also grew from 41.0 percent in 1989 to 48.0 percent in 2018. APEC's largest traders are China, Hong Kong, China, Japan, the United States, and the Republic of Korea.
4. APEC's average real GDP per capita almost doubled its 1989 value of USD8,554 to USD16,158 in 2018. Generally, real GDP per capita has increased since 1989 except for Brunei Darussalam. However, the Philippines, Indonesia, Viet Nam, Papua New Guinea, and Russia have not changed much since 1989.
5. APEC's merchandise exports have grown by eight times from USD1.2 trillion in 1989 to USD9.6 trillion in 2018 while merchandise imports grew seven times from USD1.3 trillion in 1989 to USD9.9 trillion in 2018. Some of the most traded products in 2018 include electronic integrated circuits and microassemblies, electrical apparatus for line telephony, and petroleum oils.

6. Free Trade Agreements (FTAs) in APEC have also grown from just 8 in 1989 to 189 in 2018. Moreover, APEC's trade with FTA partners have grown. Exports rose from 0.6 percent in 1989 to 50.0 percent in 2018 while imports grew from 0.6 percent in 1989 to 46.3 percent in 2018.
7. Investment in APEC has also risen since 1989. Developing economies first constituted 17.3 percent of Gross Fixed Capital Formation (GFCF) when APEC started but has expanded to 55.3 percent in 2018.
8. APEC's digitalization has also been improving. For instance, mobile cellular subscriptions (as a percent of population) has grown from 4.7 million in 1989 to 3.5 billion in 2017. Internet users have likewise seen similar growth, especially with developing APEC economies where about three-fourths of APEC internet users reside.
9. APEC's environmental goals are also being met. Carbon dioxide emissions (tonnes per USD10,000) has been declining since 1990 although emissions per person have only recently declined in 2012. Moreover, renewable energy use has increased from about 1,400 terawatt hours in 2000 to about 3,500 terawatt hours in 2017. These trends represent APEC's efforts to promote a more environmentally sustainable region.
10. However, APEC's effort to introduce more women into the labor force has failed to improve female labor force participation in the region. Female labor force participation has declined from 62.8 percent in 1991 to 57.8 percent in 2018 although similar declines were reported for males.

2.3 A Post-2020 Vision for APEC

The formulation of a Post-2020 Vision for APEC started in 2017 when Viet Nam initiated the idea of forming the AVG. This was followed by subsequent discussions during Papua New Guinea and Chile's hosting years. In August 2019, the AVG submitted their final report and recommendations to APEC Senior Officials who were then tasked to integrate by 2020 all inputs from all stakeholders. Each economy had their own processes. For the Philippines⁵, its visioning exercise is guided by four elements. First, the work was to be done following concrete timetables. The Post-2020 Vision was scheduled for adoption by APEC leaders in 2020 during Malaysia's hosting. Second, the visioning process required cooperation and collaboration between APEC partners and stakeholders. Third, efforts to cross-reference individual plans and programs were made to align with the inputs of all APEC economies. Fourth, coherence was observed so that APEC speaks as one. This final point is important because of the differing priorities of each APEC economy.

The process that formed the Bogor Goals inspired the AVG process, which looks forward to a new APEC vision succeeding the Bogor Goals. The AVG made a restatement of the existing APEC vision and revisited the Bogor Goals. The inspiration continued the concept of a free

⁵ Information on the Philippines' visioning exercise is based on the Multi-Stakeholder Consultation on Post-2020 Vision for APEC jointly held by the Department of Foreign Affairs, Office of the Undersecretary for International Economic Relations and by PIDS. This event was held on 14 October 2019 at the Makati Diamond Residences.

and open trade and investment, and was expanded to include a people-centered economic growth characterized by an innovative, inclusive, sustainable, balanced, secure, and resilient region. An interesting improvement to the APEC vision is including good economic governance, and an open market-oriented enabling environment. The latter opens APEC to digital transformation. APEC was envisioned to be the most dynamic and most innovative leader in the Asia-Pacific.

Further, the AVG recommended 10 important points that the APEC Senior Officials must consider. First, APEC should reassert its leadership, particularly in championing a rules-based MTS. Second, APEC should complete the unfinished business of the Bogor Goals. These two recommendations are reaffirmations of APEC's existing efforts.

Third, APEC should prioritize inclusion and economic empowerment. Fourth, APEC should support the development of the digital economy. Fifth, APEC should accelerate cooperation on life-long skills development and digital literacy. Sixth, APEC should advance robust and comprehensive structural reforms. These four recommendations are a recognition of human capital development, which is important for APEC economies amid global restructuring and reforms (Briones et al. 2019) not only because of the Fourth Industrial Revolution but also because of structural and regulatory reforms.

Seventh, APEC should deepen comprehensive regional connectivity and infrastructure. Eighth, APEC should further align its work to address climate change. Ninth, APEC should strengthen its interaction with stakeholders. Tenth, APEC should align its resource to advance the Post-2020 Vision. The AVG final recommendation sought to empower the APEC Secretariat. The AVG highlighted the theme "People and Prosperity," which was a suggestion made by the ASEAN caucus.

Similarly, ABAC and the Pacific Economic Cooperation Council (PECC) also provided their recommendations. On the one hand, the ABAC Report on the Post-2020 Vision recommended four pillars for APEC: dynamic; seamless; resilient; and, inclusive and sustainable. Dynamic refers to being forward-looking to issues that include the digital economy, good regulatory practice, competition policy, intellectual property rights, and life-long learning. Seamless means being aligned with the initial vision of a free and open trade and investment. Resilient is about moving forward despite change, which includes addressing job security and health, among others. Inclusive and sustainable reflects the need to support women and MSMEs in the region.

ABAC's recommendation was encapsulated in the idea of an "inclusive globalization." First, ABAC recognized the need to address issues with the World Trade Organization and the challenges that economies needed to overcome. Second, ABAC affirmed the importance of prioritizing climate change solutions. Third, ABAC understood that digital innovation and its related impact on skills and jobs on the future is an opportunity that APEC economies must be prepared to accommodate. Further, APEC needed to build both physical and digital infrastructure to empower industries and MSMEs, and to develop human capital and the next generation of students and youth.

On the other hand, the PECC recognized the need for environmental sustainability, and the opportunity offered by digitalization in the region. PECC recommended 10 things to APEC. First, member economies must be capacitated to regulate emerging technologies. Second, efforts to improve the regulatory environment and imperatives for interconnection and interconnectedness must be undertaken. Third, the APEC investment principles must be

updated. Fourth, tariff peaks and impediments posed by non-tariff barriers must be addressed. Fifth, new World Trade Organization programs must be defined. Sixth, member economies must participate in emerging plurilateral groupings, and develop and explore regional and sub-regional trade architecture. Seventh, APEC's organizational structure must be refined to ensure continuous provisions of the levels of collaboration and technical expertise. Eighth, consultative mechanisms should be strengthened. Ninth, APEC can use pathfinder initiatives relating to the full range of APEC agenda. Tenth, overloading APEC work programs must be avoided. In summary, the PECC recommended three things for the Post-2020 Vision. First, a high priority to structural reform must be made. Second, APEC must utilize its comparative advantage. Third, APEC should pursue a unified Asia-Pacific digital market.

3. Methodology

This study seeks to provide an assessment of Philippine stakeholders' perception of APEC as a contribution to the APEC post-2020 visioning exercise and related processes. Thus, an online perception survey was conducted. The survey is patterned to the study of [Siar, Albert, and Llanto \(2017\)](#), which assesses the perception on the Association of Southeast Asian Nations (ASEAN). The survey questions can be found in Annex 1. The survey contains a total of 25 questions, and is structured into three main sets. The first set consists of 10 core questions that all stakeholders are required to answer. The second set also has 10 questions but are modified depending on which stakeholder group is answering. The third and final set is a series of five miscellaneous questions. A combination of close- and open-ended questions were used to measure the perception of stakeholder respondents. The survey takes approximately 16 to 20 minutes to finish.

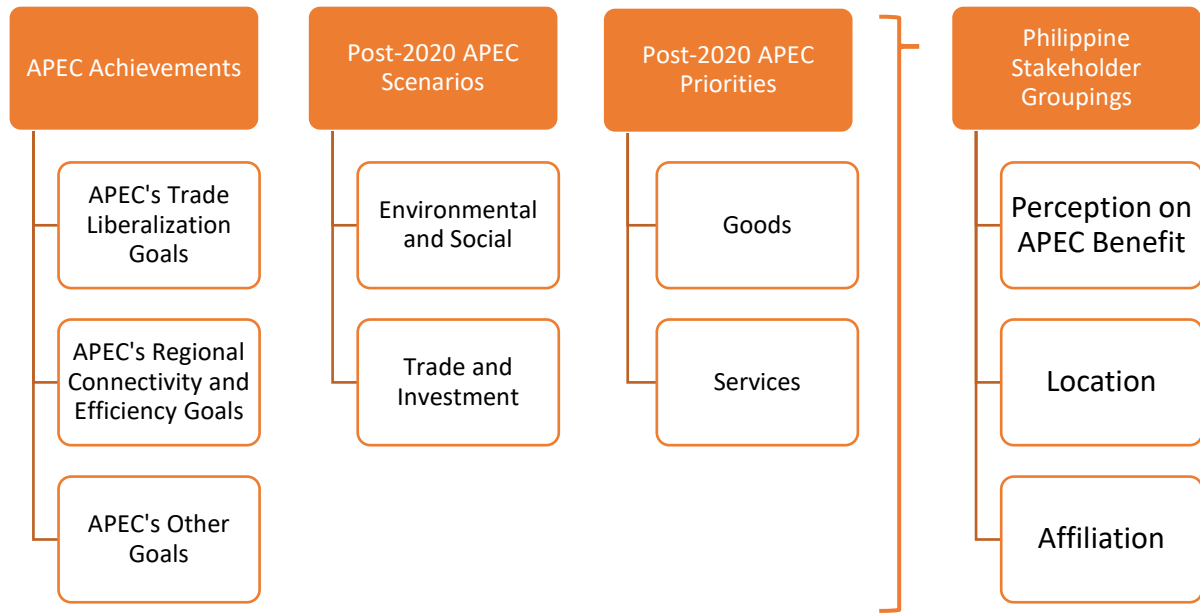
This study adopted a purposive approach to selecting respondents. The members of the Technical Board on APEC Matters (TBAM) were identified as target respondents for the government sector. TBAM regularly convenes formally collate the inputs of different government agencies attending the various workshops of APEC. The members of ABAC Philippines were surveyed as representatives of the business sector. Member institutions of the Philippine APEC Study Center Network (PASCN) were the target respondents as representatives for the academe while selected Civil Society Organizations were invited, representing broad fields of interest. Members of the Junior Philippine Economic Society (JPES) were identified to represent the youth.

This study is guided by the conceptual framework illustrated in Figure 1. The three columns to the left are the three main areas of analysis in this study, namely APEC achievements, post-2020 APEC scenarios, and post-2020 APEC priorities. The first column assesses stakeholders' perception of how APEC has addressed its trade liberalization goals, regional connectivity and efficiency goals, and its other goals. The second column measures the stakeholders' perception on the possibility of a number of scenarios occurring after 2020. Broadly, these scenarios are grouped into either environmental and social scenarios or into trade and investment scenarios. Lastly, the third column gathers the stakeholders' perception on which goods and services require an increase or a decrease in priority after 2020.

These three columns are analyzed in Section 4 using the groupings enumerated in the rightmost column, namely by their perception on the Philippines' benefit from APEC, by location, and by affiliation. The first grouping is differentiated between respondents who perceive that the Philippines has highly benefited from APEC and those who do not perceive it so. The second

grouping, meanwhile, differentiated respondents into those who reside in the National Capital Region (NCR) and those who reside elsewhere. Lastly, respondents are differentiated into government and non-government affiliations. In all these groupings, only those who are at least familiar of APEC will be included.

Figure 1 Conceptual Framework



Source: Authors' framework

4. Results and Discussion

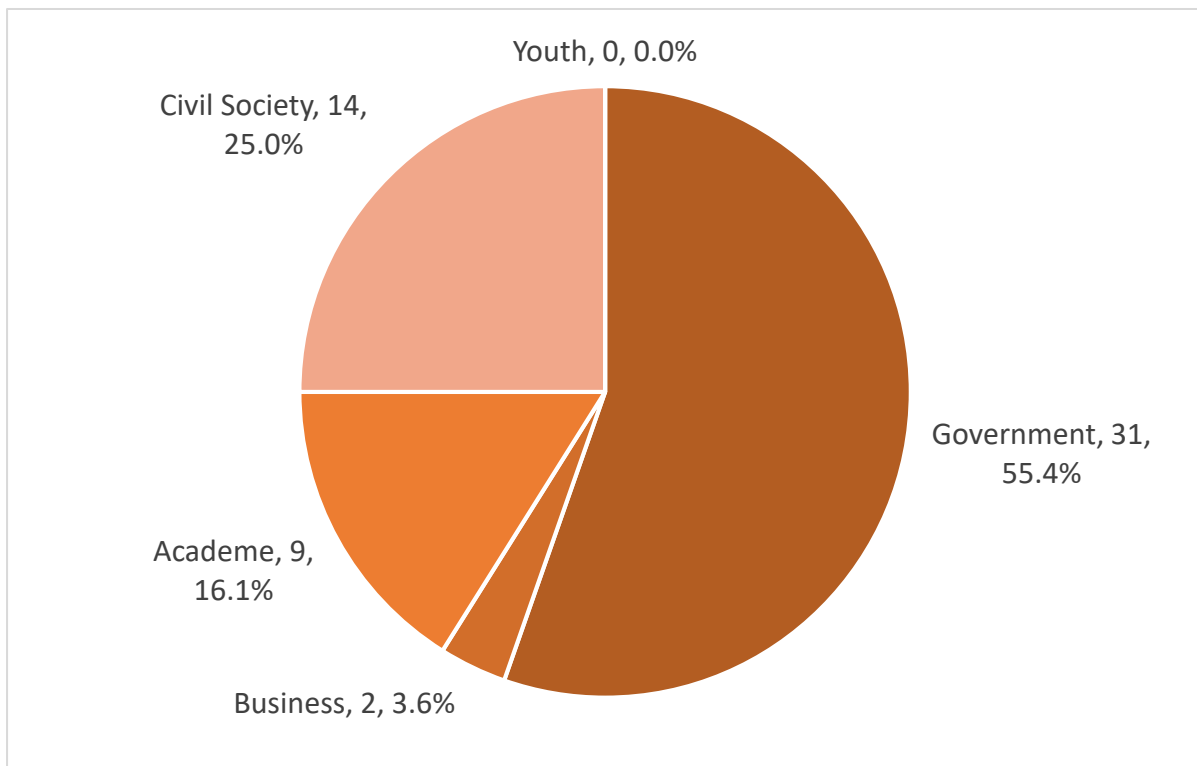
The perception survey was circulated to identified respondents and was made available online from 9 July to 9 August 2019 for a total of 32 days. The survey was cascaded to 48 TBAM members composed of departments and sub-departments, excluding PIDS; 12 PASCN members, excluding PIDS but including one non-PASCN member; and, 80 Civil Society Organizations, for a total of approximately 140 institutions.⁶ With a total of 56 respondents, the response rate for this perception survey is at about 40.0 percent. For brevity and ease of reading this report, only figures will be presented. Detailed tables, however, are provided in the annexes.

⁶ It should be noted that this total number is only an approximation. Given that the survey was cascaded via email, there exists the possibility of outdated or broken email addresses. Likewise, since the survey was cascaded internally by ABAC Philippines and JPES, the total count from the business and youth sectors have not been included in the approximation.

4.1 Respondent profile

Figure 2 shows the distribution of respondents by stakeholder group. From among the 56 respondents, there are 31 government agencies (55.4%), 2 businesses (3.6%), 9 academic institutions (16.1%), and 14 civil society organizations (25.0%). On the aggregate, this distribution provides a balance between the public sector (55.4%) and the private sector (44.6%). Annex 2 provides a detailed table of the figures found in Section 4.1. However, a detailed list of survey respondents cannot be provided in accordance to the PIDS data privacy policy that respondents agreed on.

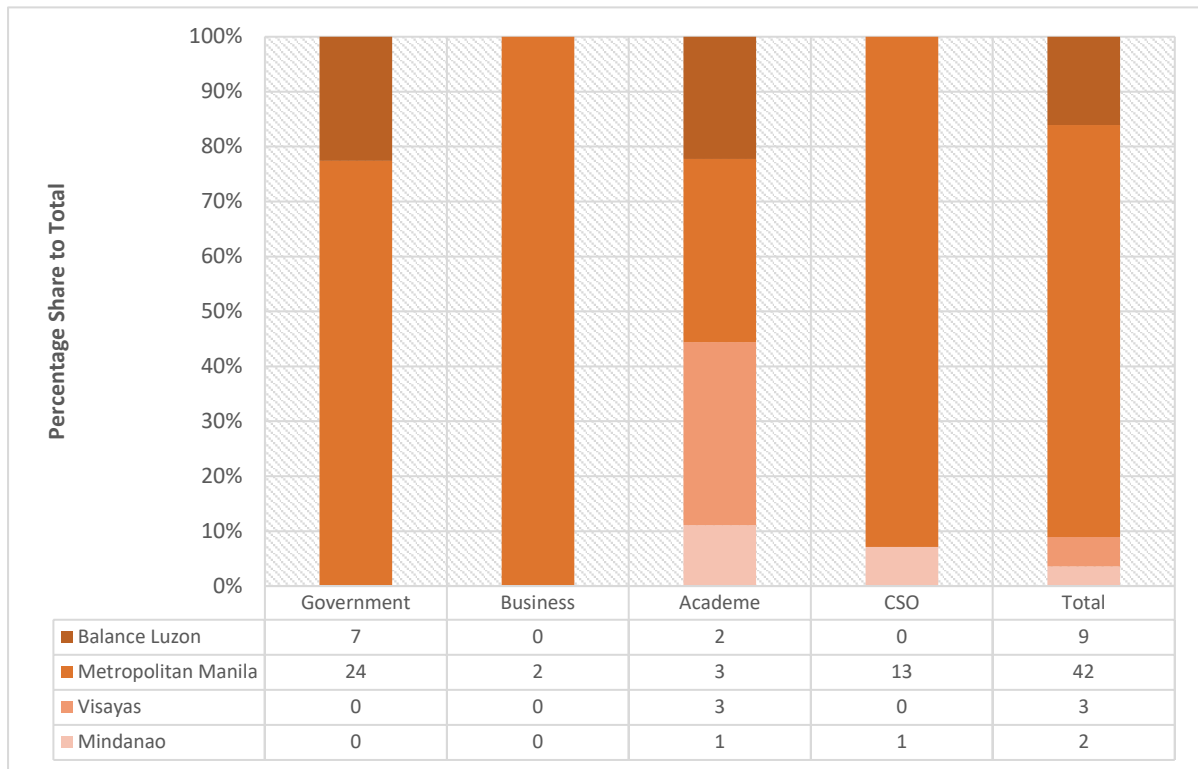
Figure 2 Distribution of respondents by stakeholder group



Source: Estimates based on the online APEC Perception Survey

Figure 3 shows that a large majority of the respondents (75.0%) reside in Metropolitan Manila followed by Balance Luzon (16.1%), which refers to all areas in Luzon except for Metropolitan Manila. Only a handful of respondents (9.0%) reside in Visayas and Mindanao. In addition, those residing in Metropolitan Manila are mostly government agencies (57.1%) and civil society organizations (31.0%) with Metro Manila having representatives for all stakeholder groups.

Figure 3 Respondent location

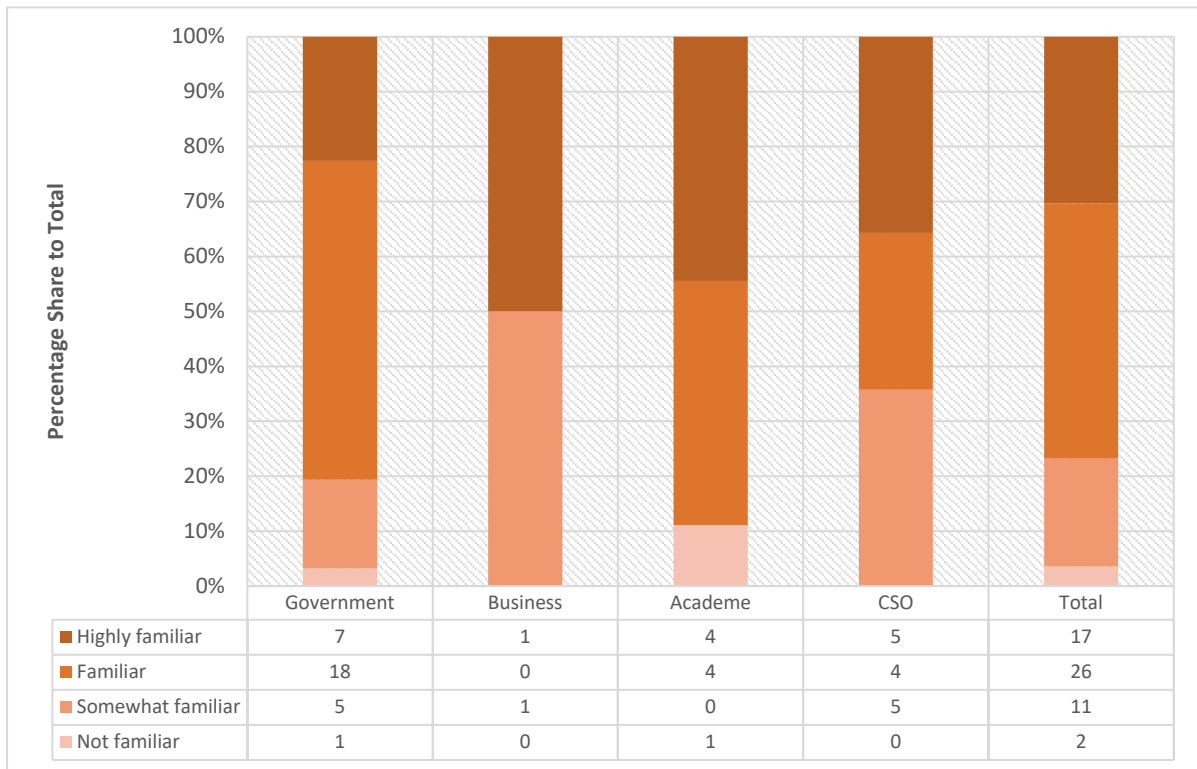


Source: Estimates based on the online APEC Perception Survey

Respondents were asked to self-assess themselves about their familiarity and knowledge of APEC, particularly on APEC’s goals, history, development, and overall activities and events, using a scale of 0 (not at all familiar) to 100 (extremely familiar). Figure 4 shows that a total of 76.8 percent described themselves as being at least familiar of APEC. The majority of these respondents are from government (58.1%) and civil society (14.3%).

This distribution implies that only 43 respondents (76.8%) will be used for the analysis in Sections 4.2 to 4.4. A total of 13 respondents have been removed from further analysis. The omissions represent 6 out of 31 government agencies (19.4%), 1 out of 2 businesses (50.0%), 1 out of 9 academic institutions (11.1%), and 5 out of 14 civil society organizations (35.7%).

Figure 4 Respondent familiarity of APEC

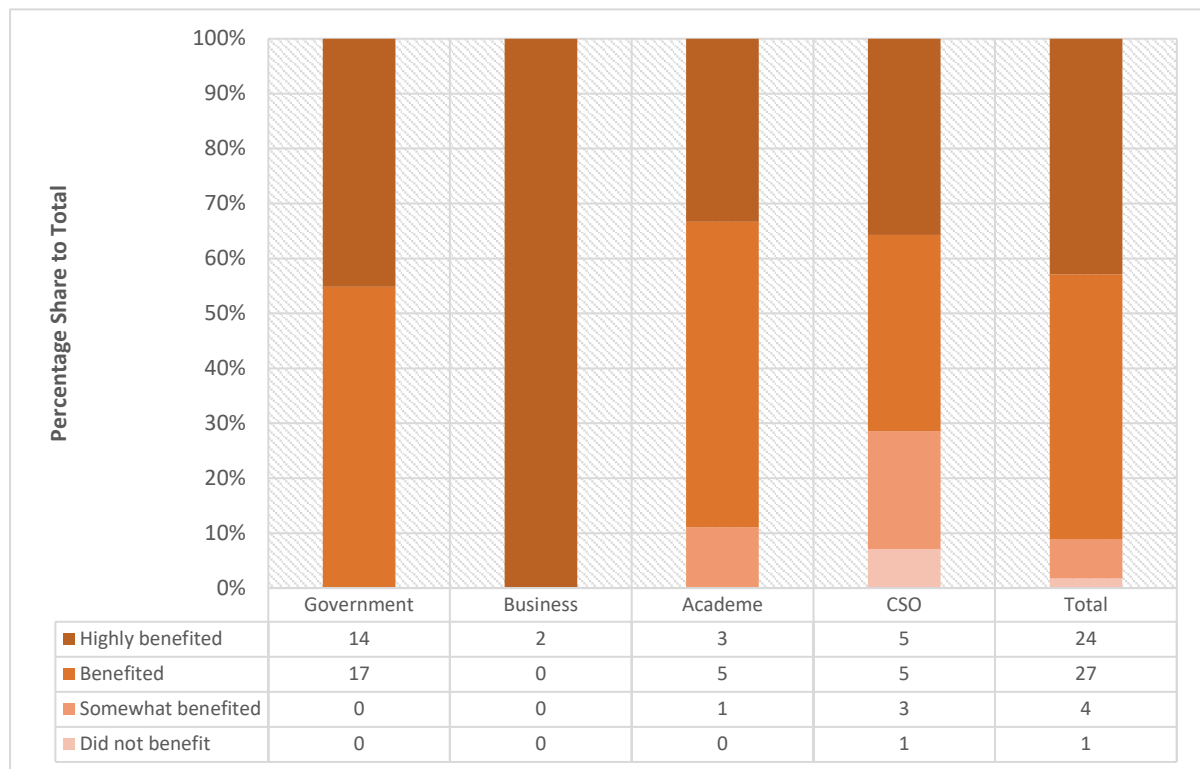


Source: Estimates based on the online APEC Perception Survey

Respondents were also asked about their perception on whether the Philippines has benefited from its participation to APEC. On the aggregate, 91.1 percent of respondents perceive that the Philippines has at least benefited from APEC (Figure 5). Again, a large majority of these respondents come from government agencies (60.8%) located in NCR (47.1%).

Notably, from the 43 institutions that identified as being at least familiar of APEC, 51.2 percent perceive that the Philippines has highly benefited from APEC while 48.8 percent perceive it as anything less. In both groups, the government sector represents the largest share. The only civil society organization who responded that the Philippines has not benefited from APEC has been omitted from further analysis as it has also responded to be less than familiar of APEC.

Figure 5 Perception on the Philippines' benefit from APEC

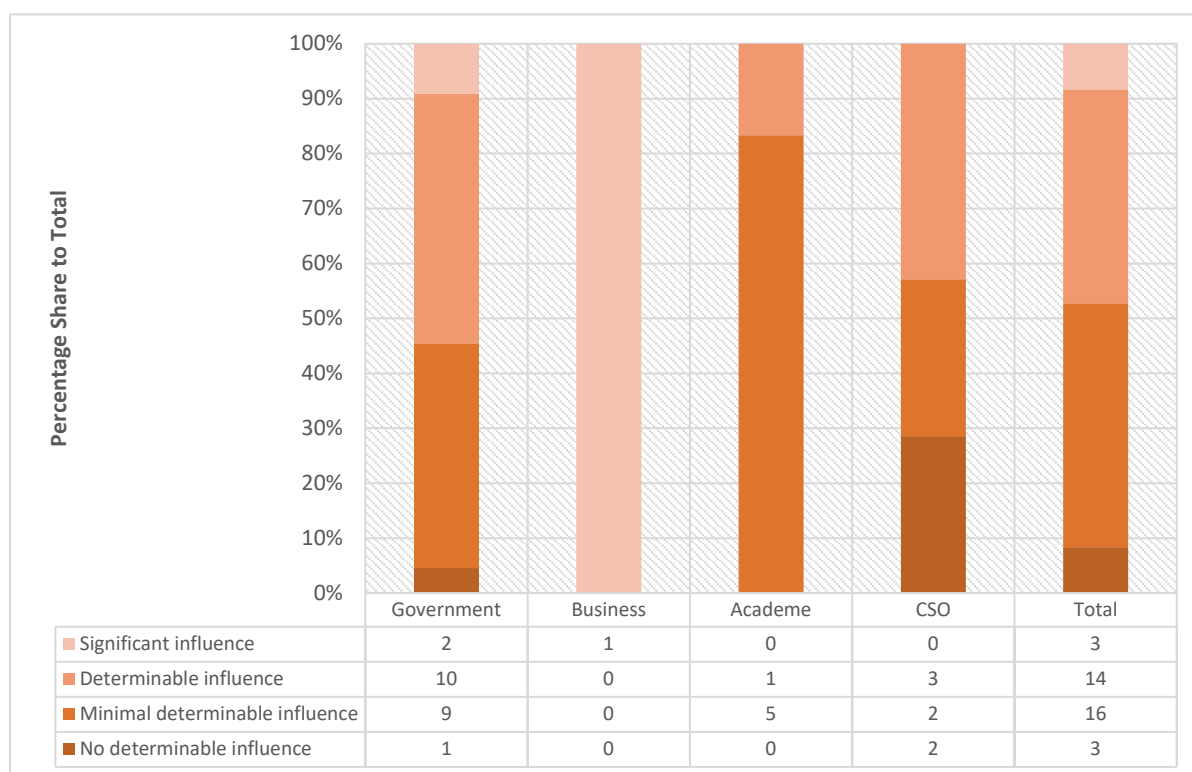


Source: Estimates based on the online APEC Perception Survey

Respondents were asked about their perception on APEC's role and influence to their agency or institution. Figure 6 shows that 47.2 percent of the 36 respondents recognize that APEC has at least a determinable influence on them while 52.7 percent responded that APEC has only at most a minimal determinable influence on them.

Moreover, from the 14 non-government institutions, respondents generally answered that APEC has only a minimal determinable influence on them (64.3%). Meanwhile, government agencies that identified APEC as having at least a determinable influence on them constitutes 33.3 percent of total respondents while non-government institutions represent only 13.9 percent of total respondents. These observations suggest that APEC's role and influence is contained mostly on the operations and functions of government, which is understandable given that APEC is attended and represented by different government representatives to APEC.

Figure 6 Perceived role and influence of APEC on the stakeholder



Source: Estimates based on the online APEC Perception Survey

4.2 Perception on APEC achievements

Since its establishment in 1989, APEC and its member economies have continued to pursue different goals⁷. These goals can be categorized into three main groups, namely trade liberalization, regional connectivity and efficiency, and other APEC goals. Respondents were asked to rate each goal using a scale of 1 (APEC has not done anything), 2 (APEC has done minimal effort), 3 (APEC has done an acceptable effort but can do more) and 4 (APEC has done a satisfactory effort)

4.2.1 Trade liberalization goals

There are eight trade liberalization goals in APEC, namely: increase total trade in goods; increase total trade in services; reduce tariff rates; lowering trade transaction costs; reduce costs for importers; reduce costs for exporters; reduce tariffs on APEC-listed ‘environmental goods’; and, promote regional economic integration

Figure 7 shows the mean scores for APEC’s trade liberalization goals according to their perception on the Philippines’ APEC benefit. Annex 3 provides a detailed table for this grouping. Three observations can be made in Figure 7. First, respondents who perceive that the Philippines has highly benefited from APEC noticeably rated APEC’s goals with higher mean

⁷ The list of APEC goals and achievements are based on the official website of APEC. The list can be found in: <https://www.apec.org/About-Us/About-APEC/Achievements-and-Benefits>

scores than those who perceive that the Philippines has benefited less so. The only instance where both groups agree is on APEC's effort to reduce tariffs on APEC-listed environmental goods, which both groups rated with a mean score of 3.1. Second, both groups have a large difference of about 0.4 points in their perception of APEC's effort to reduce costs for exporters and reduce tariff rates. This is interesting because these two goals are part of APEC's topmost goal of free and open trade. Third, increasing total trade in goods received the highest total mean score of 3.4.

Figure 7 Perception on APEC's trade liberalization goals by perception on the Philippines' APEC benefit



Source: Estimates based on the online APEC Perception Survey

Note: Mean scores with the following interpretations: APEC has not done anything (=1); APEC has done minimal effort (=2); APEC has done an acceptable effort but can do more (=3); APEC has done a satisfactory effort (=4).

Figure 8 shows the mean scores when respondents are differentiated by their location. A detailed table of this category can be found in Annex 4. There are three observations that can be made from Figure 8. First, respondents located in NCR noticeably rate trade liberalization goals with a higher mean score. This is important because it can suggest that APEC's efforts are felt more in NCR. The instances where both groups agree is regarding their perception on APEC's effort to reduce tariff rates and reducing tariffs on APEC-listed environmental goods, which both groups gave a mean score of about 3.3 each. This would suggest that APEC's effort to reduce tariffs is felt across the Philippines. Second, both groups have large differences in

perception across all goals but the largest differences can be found in APEC’s promotion of regional economic integration, lowering of trade transaction costs, and reduction of costs for importers, which had a difference of at least 0.4 points. Incidentally, APEC’s effort to promote regional economic integration received the lowest total mean score of 2.9. Third, reducing tariffs on APEC-listed environmental goods received the highest total mean score of 3.4.

Figure 8 Perception on APEC’s trade liberalization goals by location

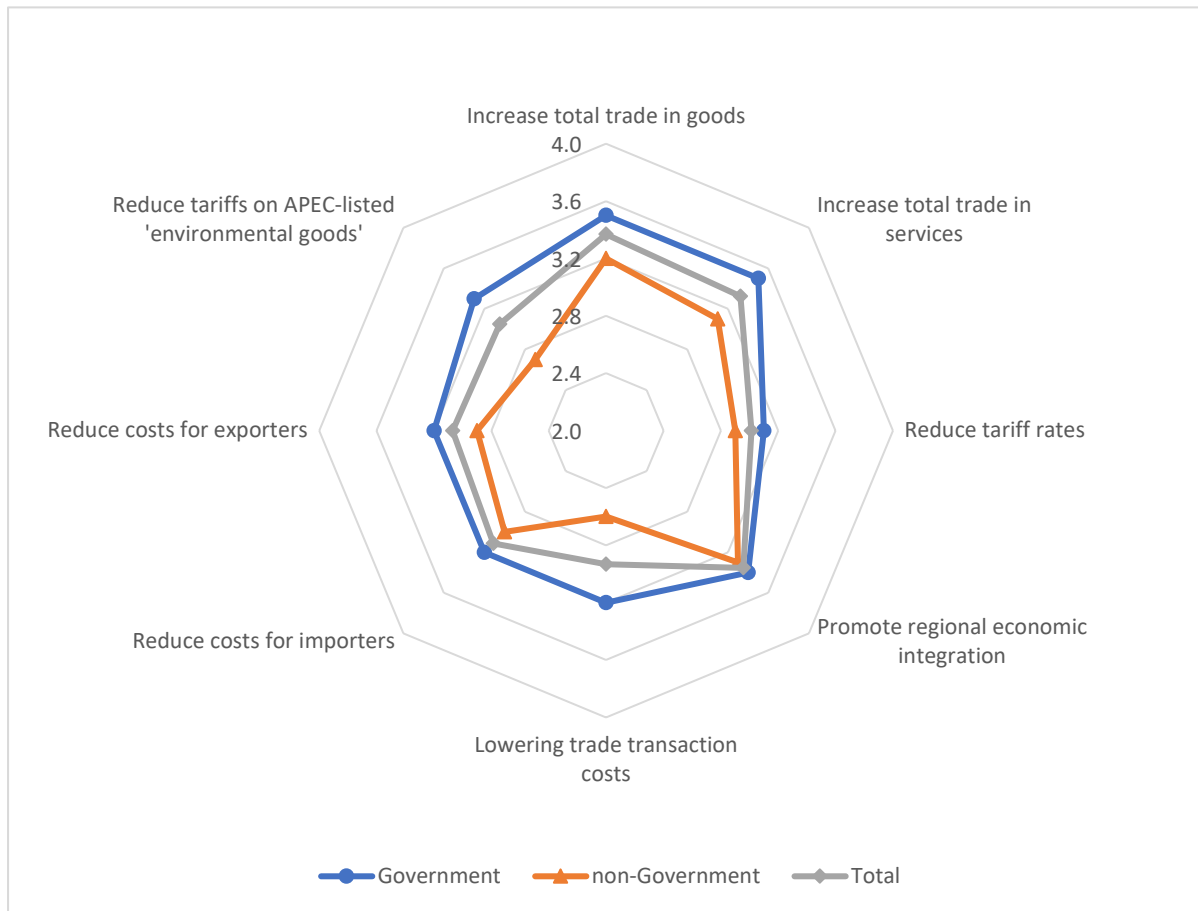


Source: Estimates based on the online APEC Perception Survey

Note: Mean scores with the following interpretations: APEC has not done anything (=1); APEC has done minimal effort (=2); APEC has done an acceptable effort but can do more (=3); APEC has done a satisfactory effort (=4).

Figure 9 shows the mean scores when respondents are differentiated by their affiliation. Annex 5 provides a detailed table for this category. It can be observed from Figure 9 that government agencies rate APEC’s contribution to trade liberalization goals higher than non-government institutions. This is expected since government agencies are the ones primarily engaged in APEC. However, both groups agree on their perception about APEC’s effort to promote regional economic integration, which both groups rated with a mean score of about 3.4; the highest total mean score across all goals. Large differences in perception between the groups can be found in APEC’s effort to reduce tariffs on APEC-listed environmental goods and lowering trade transaction costs, which had a difference of 0.6 points each.

Figure 9 Perception on APEC's trade liberalization goals by affiliation



Source: Estimates based on the online APEC Perception Survey

Note: Mean scores with the following interpretations: APEC has not done anything (=1); APEC has done minimal effort (=2); APEC has done an acceptable effort but can do more (=3); APEC has done a satisfactory effort (=4).

An analysis of Figures 7 to 9 reveals a pattern on stakeholder perception to APEC's trade liberalization goals. Perception on APEC's effort to reduce tariffs on APEC-listed environmental goods is the only goal where both groups in each category consistently have the same perception. Incidentally, the perception is that APEC has done an acceptable effort but can do more. Moreover, APEC's effort to increase total trade in goods is consistently rated high across groupings.

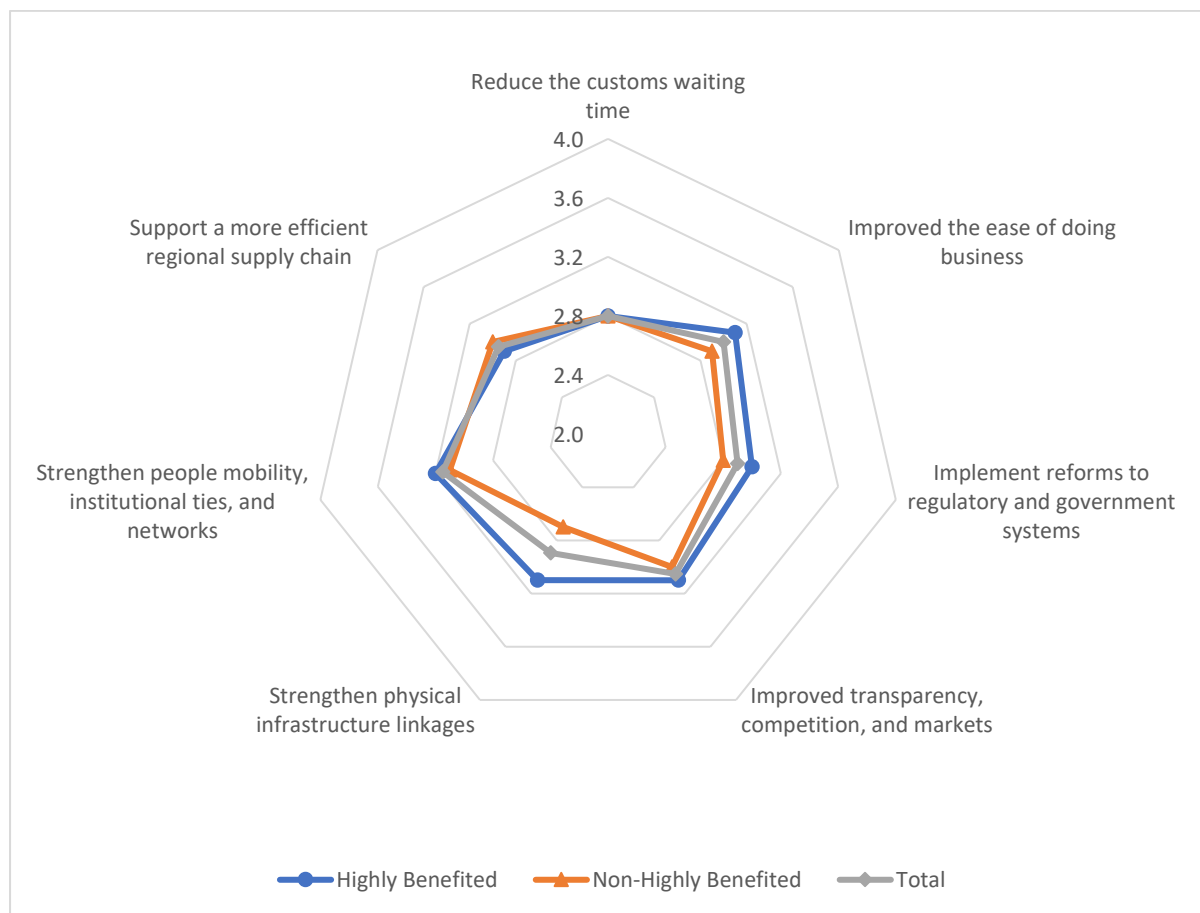
4.2.2 APEC's regional connectivity and efficiency goals

There are seven regional connectivity and efficiency goals in APEC, namely: reduce the customs waiting time; improve the ease of doing business; implement reforms to regulatory and government systems; improve transparency, competition, and markets; strengthen physical infrastructure linkages; strengthen people mobility, institutional ties, and networks; and, support a more efficient regional supply chain.

Figure 10 shows the mean scores given by respondents according to their perception on the Philippines' benefit from APEC. Figure 10 leads to three observations. First, respondents who

perceive that the Philippines has highly benefited from APEC gave a higher mean score as compared to those who perceive that the Philippines has benefited otherwise. The only exception is in the goal of supporting a more efficient regional supply chain (i.e., difference of 0.1 points). Second, both groups generally agree in their perceptions about APEC's effort except on improving the ease of doing business, implementing reforms to regulatory and government systems, and strengthen physical infrastructure linkages. These goals had a mean score difference of 0.2 to 0.4 points. Third, the goal of strengthening people mobility, institutional ties, and networks received the highest total mean score of 3.2 while the goal of reducing the customs waiting time had the lowest total mean score of 2.8.

Figure 10 Perception on APEC's regional connectivity and efficiency goals by perception on the Philippines' APEC benefit



Source: Estimates based on the online APEC Perception Survey

Note: Mean scores with the following interpretations: APEC has not done anything (=1); APEC has done minimal effort (=2); APEC has done an acceptable effort but can do more (=3); APEC has done a satisfactory effort (=4).

When respondents are differentiated by location, three things were also observed (Figure 11). First, NCR respondents' mean score are generally, at least as high as non-NCR respondents. Second, the goals of improving the ease of doing business and improving transparency, competition, and markets received the highest difference of perception between the two groups. Third, the goal of strengthening people mobility, institutional ties, and networks received the highest total mean score of 3.2 while the goal of reducing the customs waiting time had the lowest total mean score of 2.8.

Figure 11 Perception on APEC's regional connectivity and efficiency goals by location

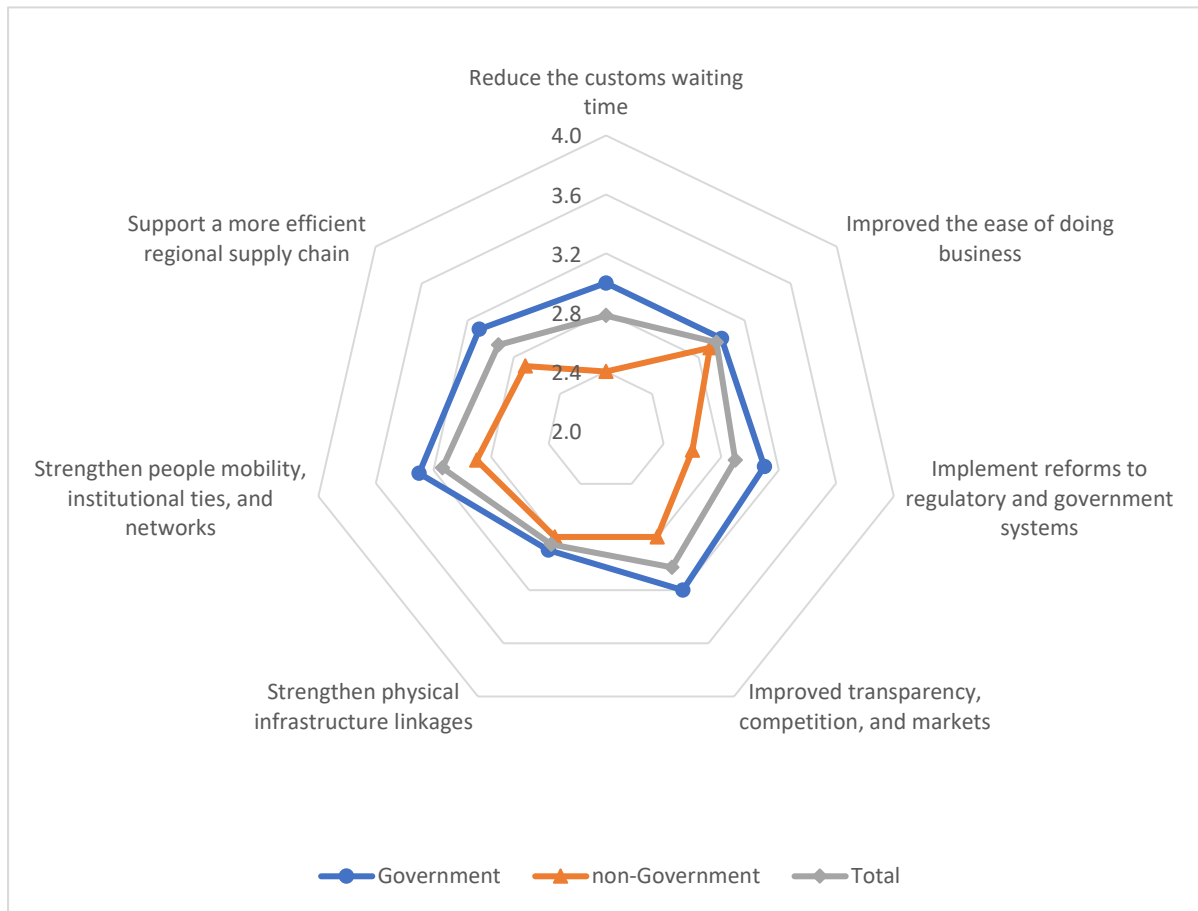


Source: Estimates based on the online APEC Perception Survey

Note: Mean scores with the following interpretations: APEC has not done anything (=1); APEC has done minimal effort (=2); APEC has done an acceptable effort but can do more (=3); APEC has done a satisfactory effort (=4).

Figure 12 presents the mean scores of respondents differentiated by affiliation. Government agencies rate APEC's regional connectivity and efficiency goals higher than non-government institutions. Interestingly, the goals of improving the ease of doing business and strengthening physical infrastructure linkages had relatively close mean scores between the two groups. Second, the goal of reducing the customs waiting time received a mean score of 2.4, which signals that non-government institutions perceive that APEC has asserted little effort or influence towards fulfilling this goal. Third, the goal of strengthening people mobility, institutional ties, and networks received the highest total mean score of 3.1 while the goal of reducing the customs waiting time had the lowest total mean score of 2.8.

Figure 12 Perception on APEC's regional connectivity and efficiency goals by affiliation



Source: Estimates based on the online APEC Perception Survey

Note: Mean scores with the following interpretations: APEC has not done anything (=1); APEC has done minimal effort (=2); APEC has done an acceptable effort but can do more (=3); APEC has done a satisfactory effort (=4).

An analysis of Figures 10 to 12 reveal two patterns. First, respondents across all categories consistently ranked the goal of strengthening people mobility, institutional ties, and networks with the highest total mean score. Perception on APEC's effort to reduce the customs waiting time was also consistent across the categories although it was the lowest total mean score each time. Moreover, non-government institutions ranked this goal low enough to be interpreted as APEC being perceived as having only a minimal effort or influence. The second pattern is that all categories, except for differentiating by affiliation, had a difference in perception for the goal of improving the ease of doing business.

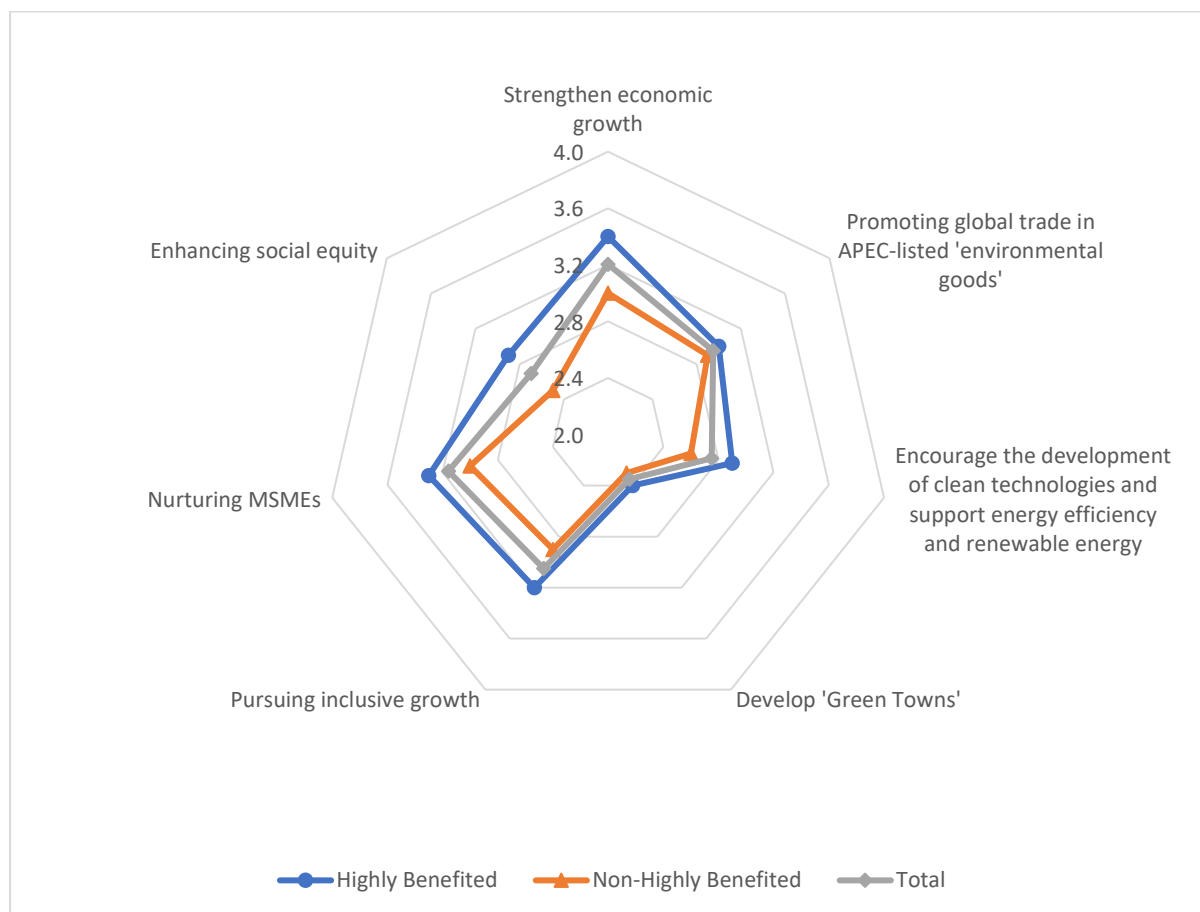
4.2.3 Other APEC goals

APEC goes beyond trade liberalization, and regional connectivity and efficiency to cover other global issues raised by member economies. All of these are grouped into other APEC goals, which number to seven, namely: strengthening economic growth; promoting global trade in APEC-listed environmental goods; encourage the development of clean technologies and

support energy efficiency and renewable energy; develop green towns⁸; pursuing inclusive growth; nurturing MSMEs; and, enhancing social equity.

Figure 13 shows the mean scores differentiated by perception on the Philippines' APEC benefit. Three things can be observed from this figure. First, respondents who perceive that the Philippines has highly benefited from APEC gave higher mean scores. Second, both groups gave the goal of developing green towns a low mean score which may be interpreted as APEC being perceived as having done only a minimal effort or asserting little influence in this regard. This goal also had the lowest total mean score (2.3). Third, the highest total mean score is on the goal of strengthening economic growth and nurturing MSMEs, which both had a total mean score of 3.2.

Figure 13 Perception on APEC's other goals by perception on the Philippines' APEC benefit



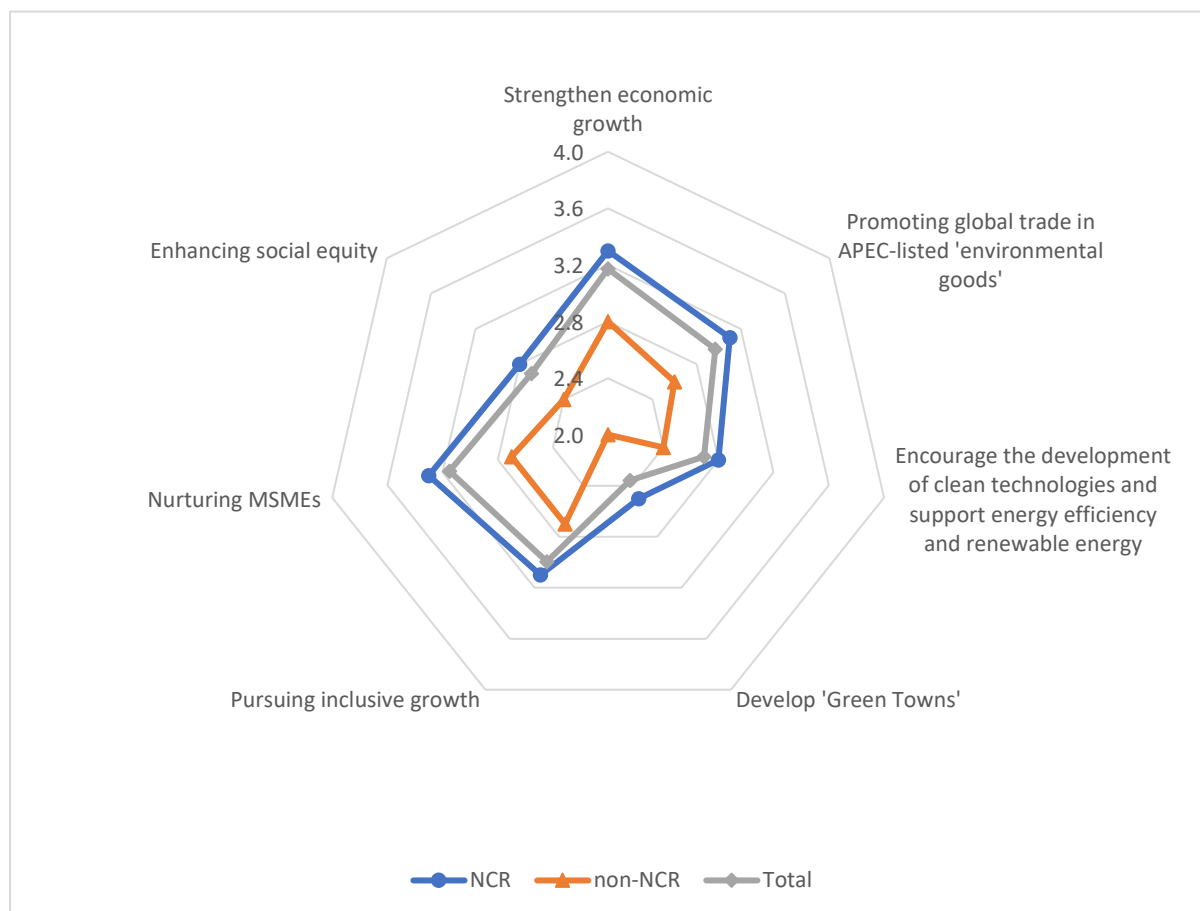
Source: Estimates based on the online APEC Perception Survey

Note: Mean scores with the following interpretations: APEC has not done anything (=1); APEC has done minimal effort (=2); APEC has done an acceptable effort but can do more (=3); APEC has done a satisfactory effort (=4).

⁸ Green Towns refer to APEC's Low Carbon Model Town (LCMT) project launched in 2011. The project aims to "combine energy-efficient buildings, transport, and power systems to create communities that affordably reduce energy use and carbon emissions while creating pleasant living conditions." The project has since undergone a number of changes. Its most recent is Version 6 launched in November 2016. For more on the LCMT, see: <https://aperc.ieej.or.jp/publications/reports/lcmt.html>

Differentiating respondents by location also reveals three things (Figure 14). First, NCR respondents gave a higher mean score that is remarkably higher than non-NCR. Second, non-NCR respondents gave a low mean score for the goals of encouraging the development of clean technologies and supporting energy efficiency and renewable energy (2.4), and developing green towns (2.0). These mean scores can be interpreted as APEC being perceived as having done only a minimal effort to achieve them. Third, the highest total mean score is on strengthening economic growth and nurturing MSMEs while the lowest is on developing green towns.

Figure 14 Perception on APEC's other goals by location



Source: Estimates based on the online APEC Perception Survey

Note: Mean scores with the following interpretations: APEC has not done anything (=1); APEC has done minimal effort (=2); APEC has done an acceptable effort but can do more (=3); APEC has done a satisfactory effort (=4). The number of respondents that answered "I do not know" for each item are in parentheses.

The following observations can be made from Figure 15 which shows the mean scores for APEC's other goals differentiated by affiliation. First, non-government institutions gave lower mean scores than government agencies by a difference of about 0.3 points across the goals. The only goal where both groups are relatively close enough is on their perception to APEC's effort to developing green towns, which was also the lowest total mean score among the goals. Second, the goal of enhancing social equity had a low mean score of 2.4 from non-government

institutions, which may be interpreted as APEC being perceived as having done only a minimal effort to achieving it. Third, the highest total mean score was given to strengthening economic growth and nurturing MSMEs, which both had a mean score of 3.2.

Figure 15 Perception on APEC's other goals by affiliation



Source: Estimates based on the online APEC Perception Survey

Note: Mean scores with the following interpretations: APEC has not done anything (=1); APEC has done minimal effort (=2); APEC has done an acceptable effort but can do more (=3); APEC has done a satisfactory effort (=4). The number of respondents that answered "I do not know" for each item are in parentheses.

Based on Figures 13 to 15, the goal of developing green towns is ranked low. This pattern is consistent across the categories. Moreover, the similar environmental goal of encouraging the development of clean technologies and supporting energy efficiency and renewable energy was ranked low by non-NCR respondents. Similarly, enhancing social equity was also ranked low by non-government institutions. Another pattern from these figures is that the economic goals of strengthening economic growth and nurturing MSMEs have been consistently ranked with the highest total mean scores across the groupings.

4.3 Perception on post-2020 APEC scenarios

In formulating a post-2020 vision for APEC, it is interesting to know how stakeholders view APEC's future conditions based on APEC's different involvements and interests. Thus, respondents were asked to provide their opinion on the probability that certain scenarios will happen for APEC after 2020. These scenarios include:

1. Goods, services, and businesses can move easily among APEC economies;
2. Regulations and procedures make it easy for skilled workers and professionals to find work in other APEC economies;
3. It is easy to physically move around through roads, railways, air, and shipping in APEC;
4. People and businesses can digitally interact and communicate easily with one another in APEC;
5. APEC economies provide basic social protection and health services to migrant and temporary workers from other APEC economies;
6. APEC effectively conserves and sustainably manages the region's biodiversity and natural resources; and,
7. APEC has a strong voice and are important players in global negotiations and fora.

These goals can be classified into two broad groups, namely: trade and investment scenarios, and environmental and social scenarios. The former pertains to the first four scenarios while the latter refers to the last three scenarios. APEC was initially formed to promote free and open trade and investment across the Asia-Pacific economies; thus, the trade and investment scenarios are related to the earlier APEC trade liberalization and regional connectivity and efficiency goals presented in Section 4.2. Meanwhile, APEC has continued to expand its interests given growing concerns in the Asia-Pacific and even to the international community at large. This is recognized by the environmental and social scenarios in the survey, which is also related to APEC's other goals presented in Section 4.2.

To measure their perception, respondents were asked to rate the probability of scenarios happening using a scale of 1 (not likely at all), 2 (minimal chance of happening given business-as-usual conditions), 3 (acceptable chance of happening given business-as-usual conditions), and 4 (sufficient chance of happening given business-as-usual conditions), respectively.

Annexes 6 to 8 provide detailed tables of the succeeding figures in this section. Figure 16 shows the mean scores given by respondents when differentiated by their perception on the Philippines' benefit from APEC. Two observations can be made. First, respondents who perceive that the Philippines has highly benefited from APEC gave higher mean scores than those who perceive otherwise. The difference is at around 0.3 points across scenarios. Second, the highest total mean scores were rated on the scenario that people and businesses can digitally interact and communicate easily with one another in APEC (3.3) while the lowest total mean score was rated on the scenario that APEC economies provide basic social protection and health services to migrant and temporary workers from other APEC economies (2.7).

Figure 16 Perception on post-2020 APEC scenarios by perception on the Philippines' APEC benefit



Source: Estimates based on the online APEC Perception Survey

Note: Mean scores with the following interpretations: Not likely at all (=1); Minimal chance of happening given business-as-usual conditions (=2); Acceptable chance of happening but requires effort and change (=3); Sufficient chance of happening given business-as-usual conditions (=4). Environmental and social scenarios are marked with an asterisk (*).

Two observations can also be made in Figure 17, which differentiates respondents by location. In general, respondents from NCR rate scenarios with a higher mean score by an average of 0.3 points. The only exception is in the scenario where people and businesses can digitally interact and communicate easily with one another in APEC, which was rated similarly by both groups. Moreover, this scenario also had the highest total mean score of 3.4. Second, the scenarios with the lowest total mean score were on the following scenarios: regulations and procedures make it easy for skilled workers and professionals to find work in other APEC economies, APEC economies provide basic social protection and health services to migrant and temporary workers from other APEC economies, and APEC effectively conserves and sustainably manages the region's biodiversity and natural resources. All three scenarios had a total mean score of 2.7, which signals that APEC can achieve these goals but effort and change will be needed. Interestingly, two environmental and social scenarios were ranked the lowest. The scenario where APEC economies provide basic social protection and health services to migrant and temporary workers from other APEC economies was even rated by non-NCR

respondents with a mean score low enough to be interpreted as having a minimal chance of happening given APEC’s business-as-usual conditions.

Figure 17 Perception on post-2020 APEC scenarios by location



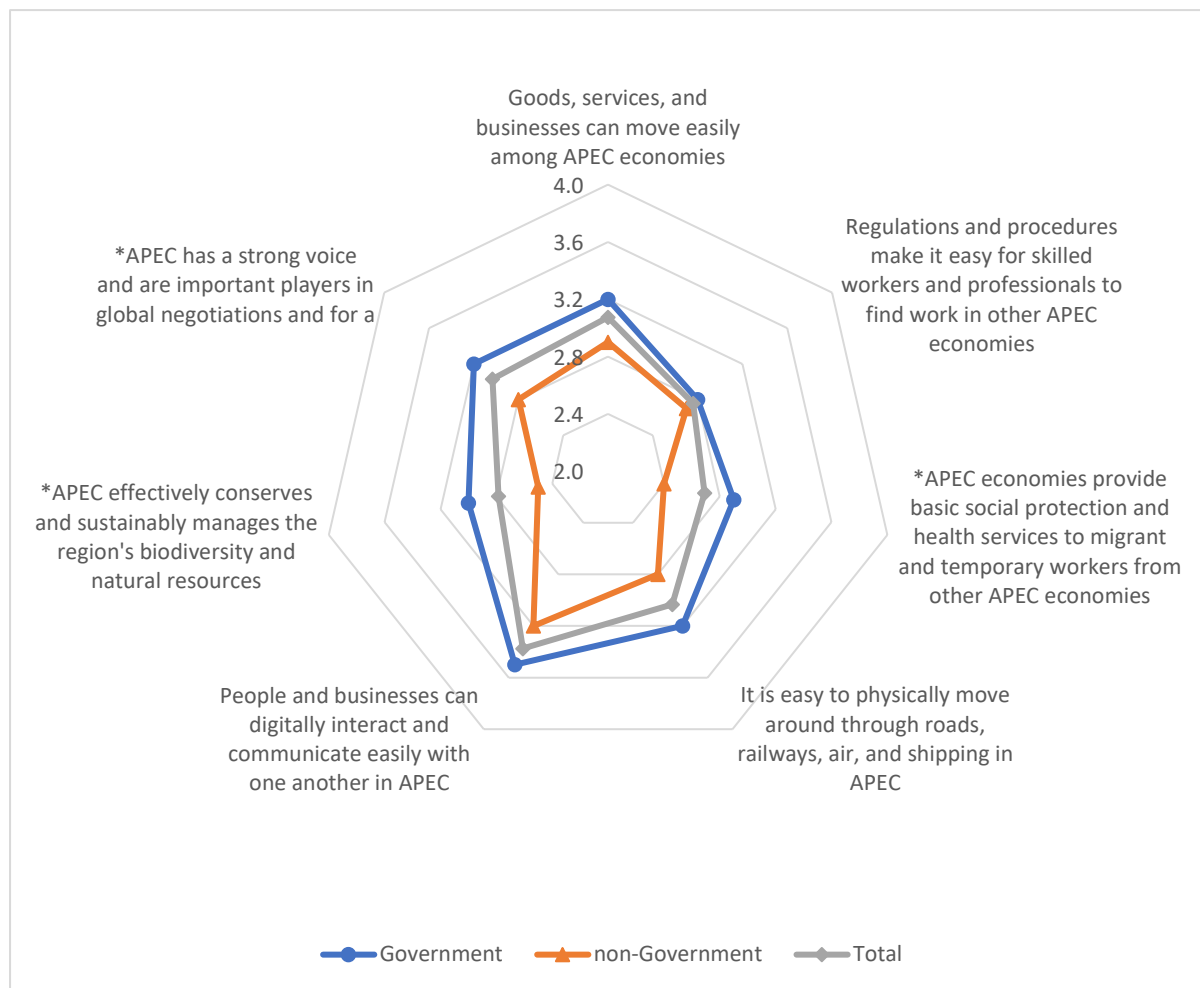
Source: Estimates based on the online APEC Perception Survey

Note: Mean scores with the following interpretations: Not likely at all (=1); Minimal chance of happening given business-as-usual conditions (=2); Acceptable chance of happening but requires effort and change (=3); Sufficient chance of happening given business-as-usual conditions (=4). Environmental and social scenarios are marked with an asterisk (*).

Meanwhile, Figure 18 shows the mean scores given by respondents differentiated by their affiliation. Three observations can be made. First, government agencies rate their perception of APEC scenarios happening post-2020 higher than non-government institutions by a difference of about 0.4 points across all scenarios. The only possible exception is the scenario where regulations and procedures make it easy for skilled workers and professionals to find work in other APEC economies, which both groups gave a relatively closer mean score of around 2.8. Second, the scenario with the highest total mean score was rated on the possibility that people and businesses can digitally interact and communicate easily with one another in APEC (3.4) while the lowest total mean score was on the possibility that APEC economies provide basic social protection and health services to migrant and temporary workers from

other APEC economies, and APEC effectively conserves and sustainably manages the region’s biodiversity and natural resources, which both had a total mean score of 2.7. Third, non-government institutions gave a mean score of 2.4 for the possibility that APEC economies provide basic social protection and health services to migrant and temporary workers from other APEC economies, which is a mean score low enough to be interpreted as having only a minimal chance of happening given APEC’s business-as-usual conditions.

Figure 18 Perception on APEC post-2020 scenarios by affiliation



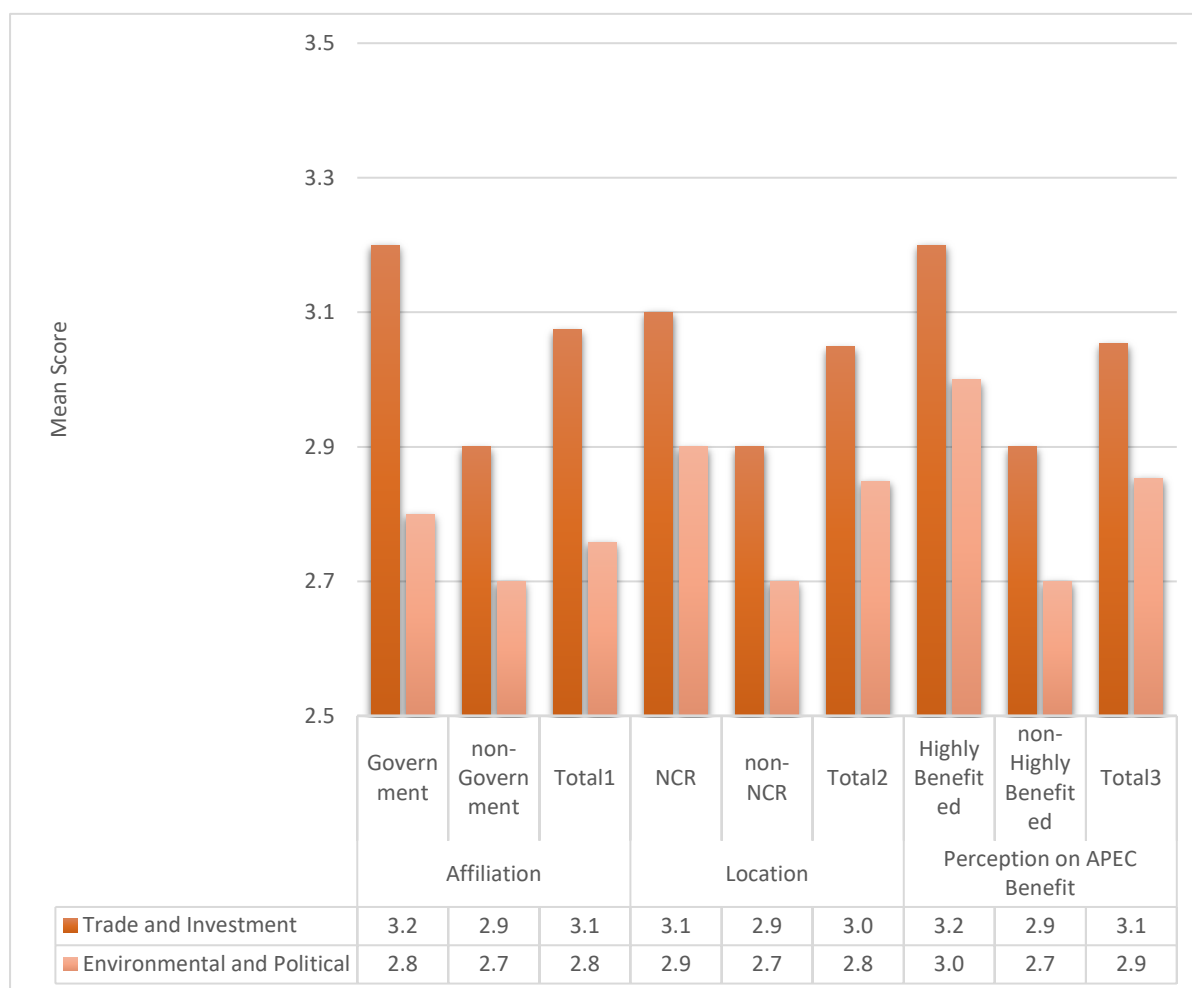
Source: Estimates based on the online APEC Perception Survey

Note: Mean scores with the following interpretations: Not likely at all (=1); Minimal chance of happening given business-as-usual conditions (=2); Acceptable chance of happening but requires effort and change (=3); Sufficient chance of happening given business-as-usual conditions (=4). Environmental and social scenarios are marked with an asterisk (*).

Figures 16 to 18 reveal two patterns: first, all stakeholder groupings ranked the possibility of people and businesses can digitally interact and communicate easily with one another in APEC with the highest total mean score. This optimism can be related to APEC’s initiatives to innovate and promote the digital economy, which was formally recognized through the APEC

Internet and Digital Economy Roadmap.⁹ Second, all stakeholder groupings consistently rated with the lowest total mean score the possibility that APEC economies provide basic social protection and health services to migrant and temporary workers from other APEC economies. Moreover, all stakeholder groups, except for those differentiated by perception on the Philippines’ benefit from APEC, rated the possibility of APEC effectively conserving and sustainably managing the region’s biodiversity and natural resources with the lowest total mean score. These low ratings show that environmental and social scenarios are met with reservations. Further analysis done by grouping the scenarios into trade and investment, and environmental and social (Figure 19) support the patterns revealed by Figures 16 to 18.

Figure 19 Perception on APEC post-2020 scenarios by different stakeholder groupings



Source: Estimates based on the online APEC Perception Survey

Note: Mean scores with the following interpretations: Not likely at all (=1); Minimal chance of happening given business-as-usual conditions (=2); Acceptable chance of happening but requires effort and change (=3); Sufficient chance of happening given business-as-usual conditions (=4).

⁹ APEC adopted the APEC Internet and Digital Economy Roadmap in 2017 during the Viet Nam hosting. This was APEC’s formal recognition that digital technologies have “the potential to continue providing significant gains.” For more details on this roadmap, see: https://www.apec.org/-/media/Files/Groups/ECSG/17_csom_006.pdf

4.4 Perception on post-2020 APEC priorities

In addition to respondents' perception to the achievement of APEC goals (Section 4.2) and the possibility of APEC post-2020 scenarios happening (Section 4.3), this section presents respondents' perception on the degree of priority needed for traded goods and services.¹⁰ A total of 14 product groups and 6 services were identified in the questionnaire, namely:

Traded Goods

1. Live animals and animal products (Ch. 1-5);
2. Vegetable products (Ch. 6-14);
3. Animal or vegetable fats and oils (Ch. 15);
4. Prepared foodstuffs (Ch. 16-24);
5. Mineral products (Ch. 25-27);
6. Chemical products (Ch. 28-38);
7. Plastics and rubber products (Ch. 39-40);
8. Textiles, wearing apparel, and related products (Ch. 41-43 and 50-67);
9. Wood and paper products (Ch. 44-49);
10. Stone and metal products (Ch. 68-83);
11. Vehicles, aircraft, and related products (Ch. 86-89);
12. Machinery, appliances, and related products (Ch. 84-85 and 90-91);
13. Recreational products (Ch. 92, 95, and 97);
14. Miscellaneous manufactured articles (Ch. 93, 94, and 96);

Traded Services

15. Financial and insurance;
16. Information and Communications Technology (ICT);
17. Public administration and defense;
18. Health;
19. Education; and,
20. Recreation.

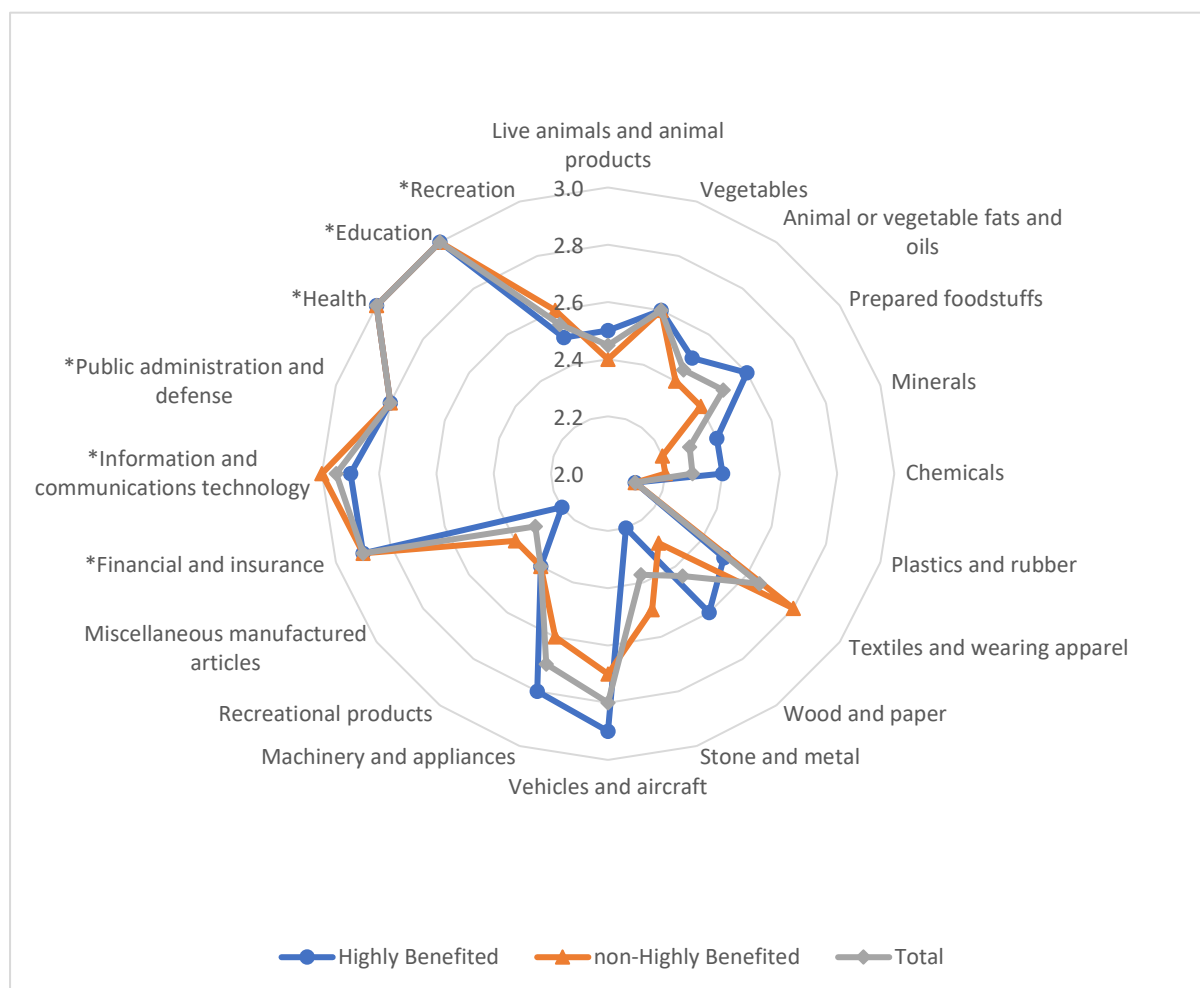
Respondents were asked to rate each product or service using a scale of 1 to 3, which are interpreted as follows: decreased level of priority, maintain level of priority from status quo; and, increased level of priority from status quo.

Annexes 9 to 11 provides detailed tables on the figures found in this Section. Figure 20 shows the mean scores rated by respondents differentiated by their perception on the Philippines' APEC benefit. The figure shows some interesting differences for traded goods and some consistency for traded services. Figure 20 reveals the following: First, perception between the two groups vary with no particular group consistently rating items higher than the other. However, respondents who perceive that the Philippines has highly benefited from APEC rated eight products and services higher than the other group. In comparison, there are only five products and services where respondents who perceive that the Philippines has not highly benefited from APEC rated items higher than the other group. Furthermore, there were a total of seven instances where both groups have similar perceptions, mostly on traded services. Second, both groups perceive that prepared foodstuffs (2.5), vegetable products (2.6), textiles,

¹⁰ The product groupings are based on the 2015 Philippine Standard Commodity Classification (PSCC), which can be viewed here: <https://psa.gov.ph/sites/default/files/2015%20PSCC%20Publication.pdf>

wearing apparel, and related products (2.7), machinery, appliances, and related products (2.7), vehicles, aircraft, and related products (2.8), and all traded services deserve increased levels of priority from the status quo. Third, vehicles, aircraft, and related products received the highest total mean score (2.8) among products while plastics and rubber products had the lowest total mean score (2.1). Fourth, ICT, health, and education were ranked the highest (3.0) among services while the lowest is on recreation services (2.5). Fifth, both groups had the largest difference in perception amounting to 0.3 points for textiles, wearing apparel, and related products, wood and paper products, and stone and metal products. Sixth, services received a higher median total score of 2.9 compared to products which only had a median total score of 2.4.

Figure 20 Perception on post-2020 APEC priorities by perception on the Philippines' APEC benefit



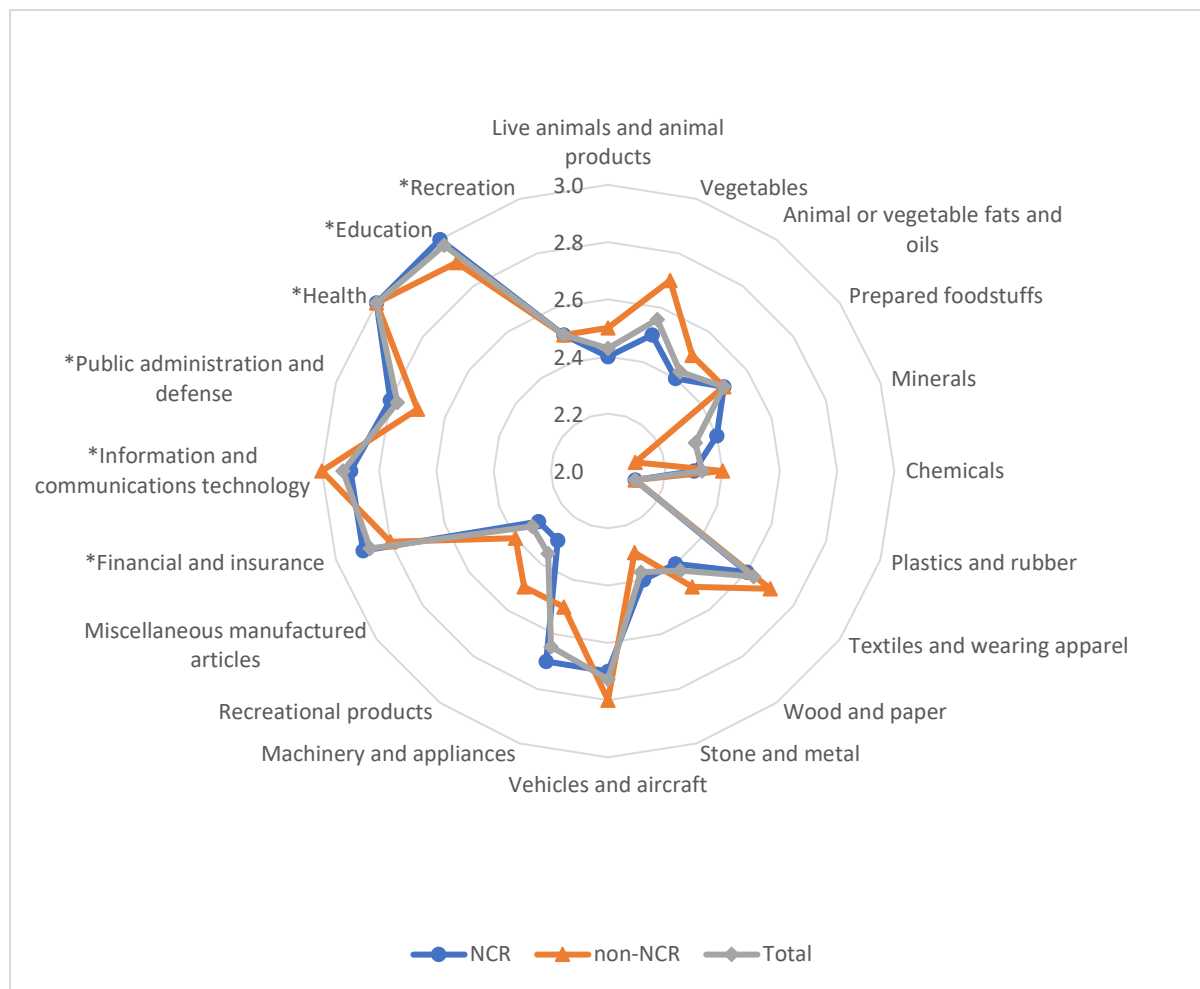
Source: Estimates based on the online APEC Perception Survey

Note: Mean scores with the following interpretations: Decreased level of priority (=1); Maintain level of priority from status quo (=2); Increased level of priority from status quo (=3). Services are marked with an asterisk (*).

Figure 21 shows the respondents' perception differentiated by location Non-NCR respondents rated 10 products and services with higher mean scores than NCR respondents. In comparison, NCR respondents rated only five products and services higher than non-NCR respondents. Mineral products recorded the largest difference in mean scores between the two groups

numbering to 0.3 points. Vehicles, aircraft, and related products reached the highest total mean score of 2.7 among products while plastics and rubber products got the lowest (2.1). In terms of services, both health and education services were rated with the highest total mean score of 3.0 while recreation services received the lowest (2.5). Services also received a higher median total score of 2.9 as compared to 2.4 for products. Finally, respondents generally perceive that prepared foodstuffs (2.5), vegetable products (2.6), textiles, wearing apparel, and related products (2.6), machinery, appliances, and related products (2.6), vehicles, aircraft, and related products (2.7), and all services need to have increased priority from the status quo.

Figure 21 Perception on post-2020 APEC priorities by location



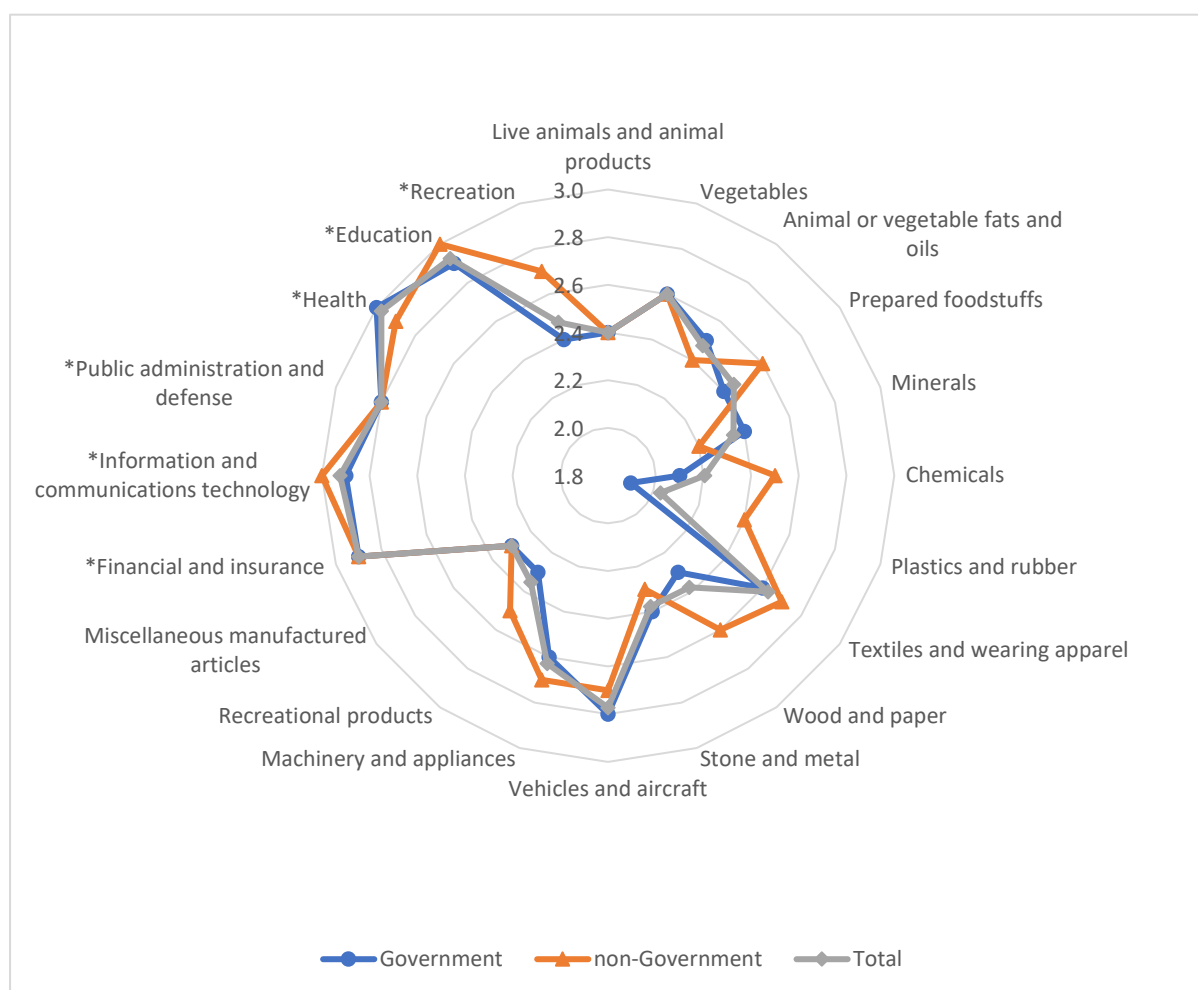
Source: Estimates based on the online APEC Perception Survey

Note: Mean scores with the following interpretations: Decreased level of priority (=1); Maintain level of priority from status quo (=2); Increased level of priority from status quo (=3). Services are marked with an asterisk (*).

Figure 22 presents the results of respondents' perception by affiliation. Some observations are perceived from Figure 22. First, non-government institutions rated 10 products and services higher than government agencies. In comparison, government agencies rated five products and services with higher mean scores. Second, plastics and rubber products registered the largest difference in mean scores between the two groups at around a 0.5-point gap. Third, vehicles,

aircraft, and related products was rated with the highest total mean score of 2.8 for products while plastics and rubber products received the lowest (2.0). Fourth, health services received the highest total mean score of 3.0 while recreation services received the lowest (2.5). Fifth, plastics and rubber products were notably the only product group that was rated with a mean score below 2.0, particularly given by government agencies. Sixth, services were rated a median total score of 2.9 as compared to 2.4 for products. Seventh, respondents generally perceive that vegetable products (2.4), animal or vegetable fats and oils (2.5), prepared foodstuffs (2.5), textiles, wearing apparel, and related products (2.6), machinery, appliances, and related products (2.6), vehicles, aircraft, and related products (2.8), and all services deserve increased priority from the status quo.

Figure 22 Perception on post-2020 APEC priorities by affiliation



Source: Estimates based on the online APEC Perception Survey

Note: Mean scores with the following interpretations: Decreased level of priority (=1); Maintain level of priority from status quo (=2); Increased level of priority from status quo (=3). Services are marked with an asterisk (*).

An analysis of Figures 20 to 22 reveals the following patterns. Perceptions vary across all products and services in all stakeholder groupings, which means that no particular group is consistently rating products and services higher than the other. Services are generally rated with high mean scores compared to product groups, which suggests that respondents perceive

services generally need increased priority. All stakeholder groups consistently identify vegetable products, textiles and wearing apparel, machinery and appliances, vehicles and aircraft, and all services as needing increased priority from the status quo. Plastics and rubber products were consistently the lowest rated product group across all stakeholder groupings. Health services were identified by all stakeholder groups to need increased priority while recreation services were consistently rated with the lowest total mean score.

4.5 Stakeholder involvement with APEC

Sections 4.2 to 4.4 provided an assessment of respondents' perception to the achievement of APEC's goals, the possibility of scenarios happening in APEC post-2020, and the degrees of prioritization for different products and services. Section 4.5 will present measures about stakeholder involvement in APEC, particularly on attendance to APEC activities, application for APEC funding, APEC's perceived role and influence to different concerns, and benefit from the existence of the ABTC.¹¹

4.5.1 Participation to APEC activities

APEC regularly convenes thrice a year during the Senior Officials' Meeting (SOM) and Related Meetings, which is in addition to the interim meetings held during the year. Broadly, APEC meetings can be grouped into the SOM Steering Committee on Economic and Technical Cooperation (ECOTECH), the Committee on Trade and Investment (CTI), and ABAC. ECOTECH includes 15 sub-fora while CTI oversees eight sub-groups and three industry dialogues as shown in Table 1.

¹¹ The APEC Business Travel Card (ABTC) "facilitates short-term business travel within the APEC region by streamlining the entry process into APEC economies. Generally, eligibility to apply for an ABTC requires a valid passport issued by an APEC economy and applicants must be engaged in regular business travel throughout the APEC region and have no criminal conviction. Further, each economy has the discretion to impose additional eligibility criteria on their applicants. Furthermore, senior government officials and officials actively engaged in APEC business may also be eligible for an ABTC. However, each economy will define a senior government official according to its own bureaucratic structure." For more on the ABTC, see: <https://www.apec.org/Groups/Committee-on-Trade-and-Investment/Business-Mobility-Group/ABTC>

The Department of Foreign Affairs in the Philippines defined the qualifications for the ABTC to be for "company or business entity representatives who are engaged in international trade and selling of goods or services and investments between APEC economies. Further, applicants must be bona fide business persons who are vested with powers and prerogatives to lay down and execute management policies, or an official nominated by the Chief Executive Officer, President, or Regional Head, whose work is directly involved in the trade of goods, the provision of services, or the conduct of investment activities when travelling overseas. For more on the Philippines' application of the ABTC, see: <https://consular.dfa.gov.ph/visainformation/25-visa/226-apec-business-travel-card>

Table 1 APEC working groups and dialogues

ECOTECH Sub-for a	
1	Agricultural Technical Cooperation Working Group (ATCWG)
2	Anti-Corruption and Transparency Experts' Working Group (ACWG)
3	Counter-Terrorism Working Group (CTWG)
4	Emergency Preparedness Working Group (EPWG)
5	Energy Working Group (EWG)
6	Experts Group on Illegal Logging and Associated Trade (EGILAT)
7	Health Working Group (HWG)
8	Human Resource Development Working Group (HRDWG)
9	Oceans and Fisheries Working Group (OFWG)
10	Policy Partnership on Science, Technology, and Innovation (PPSTI)
11	Policy Partnership for Women and the Economy (PPWE)
12	Small and Medium Enterprises Working Group (SMEWG)
13	Telecommunications and Information Working Group (TELWG)
14	Tourism Working Group (TWG)
15	Transportation Working Group (TPTWG)
CTI Sub-groups	
1	Business Mobility Group (BMG)
2	Electronic Commerce Steering Group (ECSCG)
3	Group on Services (GOS)
4	Intellectual Property Rights Experts Group (IPEG)
5	Investment Experts' Group (IEG)
6	Market Access Group (MAG)
7	Sub-Committee on Standards and Conformance (SCSC)
8	Sub-Committee on Customs Procedures (SCCP)
CTI Industry dialogues	
1	Automotive Dialogue (AD)
2	Chemical Dialogue (CD)
3	Life Sciences Innovation Forum (LSIF)

Source: Authors' list based on the Asia-Pacific Economic Cooperation. <https://www.apec.org/> (accessed December 2019)

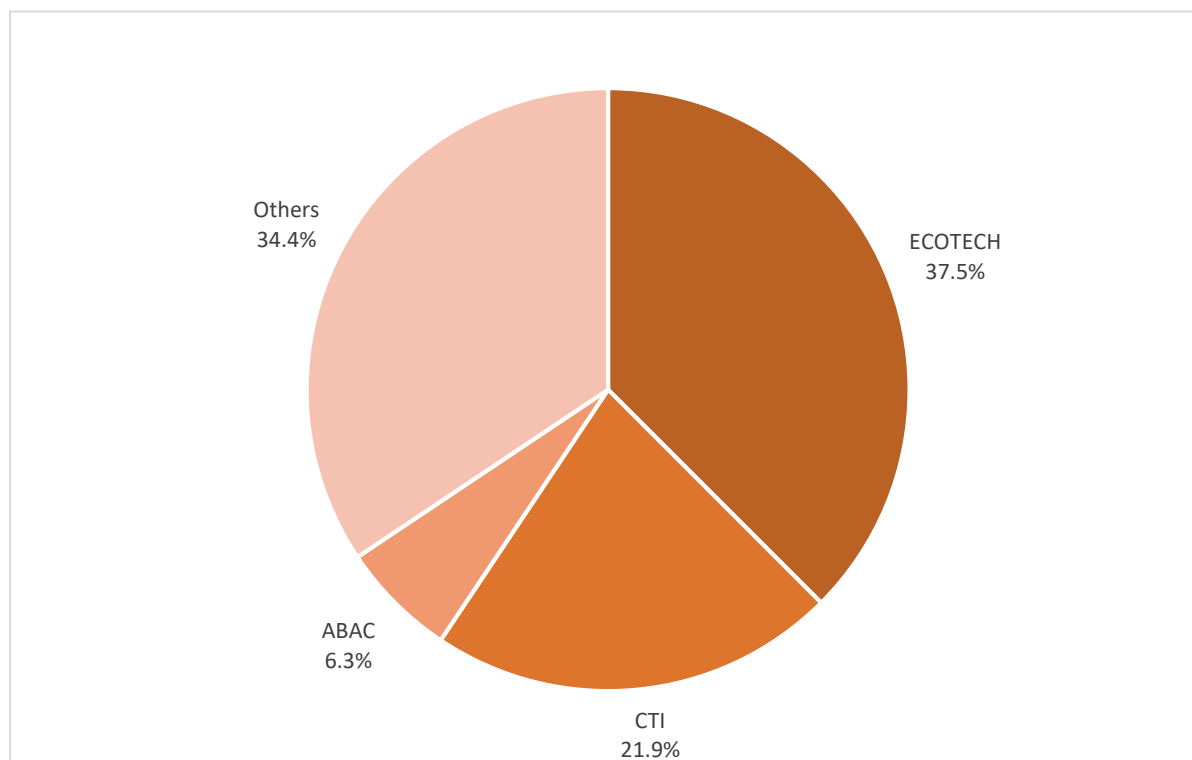
Figure 23 shows the distribution of meetings/events attended as identified by government agencies.¹² Generally, ECOTECH events have been attended the most at 37.5 percent followed by other APEC events¹³ (34.4%), CTI events (21.9%), and ABAC events (6.3%). Only 13.6 percent of government agencies responded that they have not attended any APEC event in the last five years despite the Philippines' APEC hosting in 2015.

Meanwhile, only about 30.8 percent of non-government institutions attended regular APEC events, all of which are ABAC events. This is understandable given that ECOTECH and CTI events are generally platforms where government agencies discuss regional policies while ABAC is for the private sector.

¹² Since respondents are allowed to identify multiple events, the distributions shown in Figure 23 are based on the total frequency of attended events. This means that some agencies might be attending multiple events in the same broad category.

¹³ Other APEC events include the APEC Economic Leaders' Meeting, APEC Ministerial Meeting, APEC Ministers Responsible for Trade, Sectoral Ministerial Meetings, Finance Deputies' Meeting, Senior Finance Officials' Meeting, Finance Ministers' Meeting, Friends of the Chair, APEC Studies Center Network, Policy Partnership on Food Security, and High-Level Policy Dialogue on Agricultural Biotechnology.

Figure 23 Participation of government agencies to regular APEC events



Source: Estimates based on the online APEC Perception Survey

4.5.2 Application for APEC funding

APEC economies can further benefit from their inclusion to APEC through availing project funding. APEC provides four main sources of funding for APEC projects¹⁴, namely:

1. General Project Account (GPA);
2. Trade and Investment Liberalisation and Facilitation Account (TILF);
3. APEC Support Fund (ASF), which is comprised of a general fund and a number of sub-funds; and,
4. Self-funding by the APEC economy.

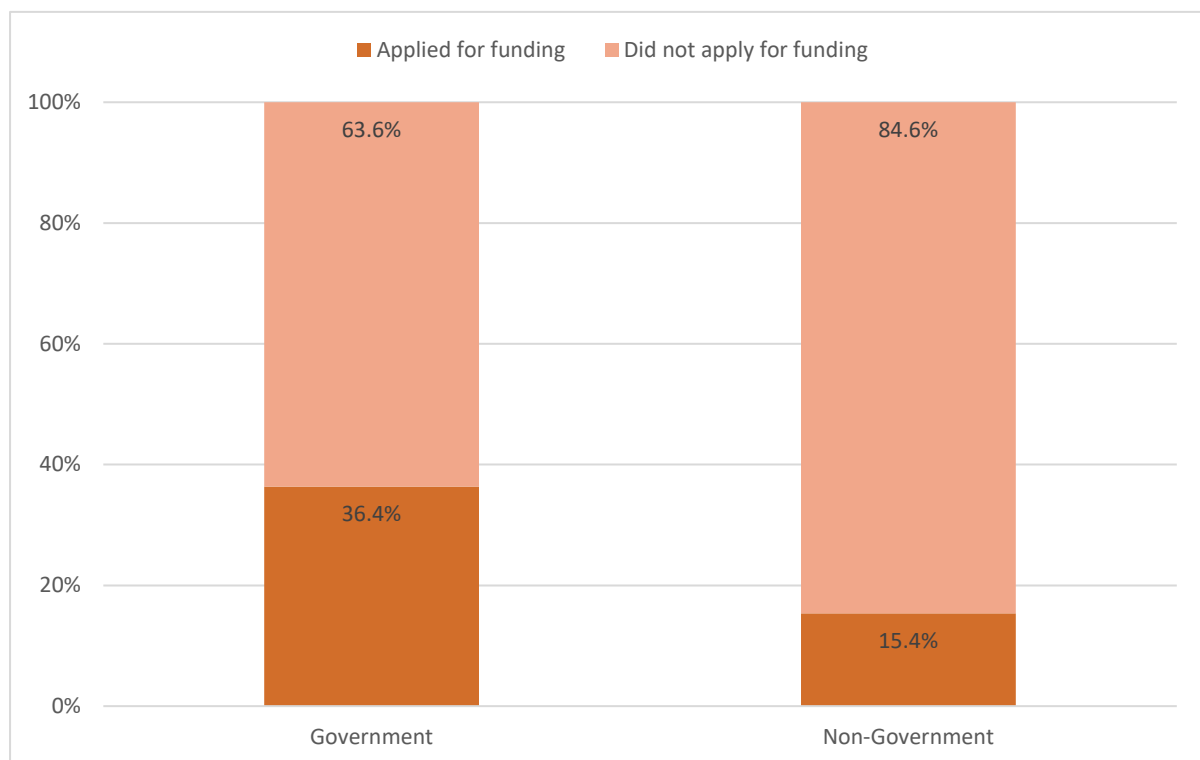
Given the limited resources of APEC, project funding tends to be competitive. An application process is applied to ensure that APEC resources are properly utilized. The process can be broken into two major steps: the submission of the project concept note and then of the project proposal. Each year, APEC provides two project sessions where APEC economies can participate in this selection process. To illustrate, estimated funds as of the 2019 project session 2 totals to USD9.9 million. The largest portion is in the ASF sub-fund (71.9%) followed by the ASF general fund (12.6%), the GPA (8.0%), and the TILF (7.5%). ASF sub-funds change depending on the available funds of APEC and existing contributions but during the 2019

¹⁴ For more on the APEC Project Funding Sources and other related documents and guidebooks to apply for APEC project funding, see: <https://www.apec.org/Projects/Funding-Sources>

project session 2, the funds for digital innovation and supply chain connectivity combined totals to 33.4 percent of the USD7.1 million total ASF sub-fund.

Figure 24 shows that 36.4 percent of government agencies who responded to the online survey were able to apply for APEC funding. In contrast, only 15.4 percent did for non-government institutions. Some of the Philippines’ most recent APEC projects¹⁵ include the 2017 project sponsored by the SMEWG titled “Enhancing the competitiveness of women-led MSMEs in the garments and textile sector through innovation and entrepreneurship” and the 2016 project sponsored by CTI titled “Workshop to discuss best practices on practical solutions/programmes to integrate SME suppliers into automotive global value chains (GVCs).”

Figure 24 Application for APEC funding by affiliation



Source: Estimates based on the online APEC Perception Survey

4.5.3 APEC’s role and influence

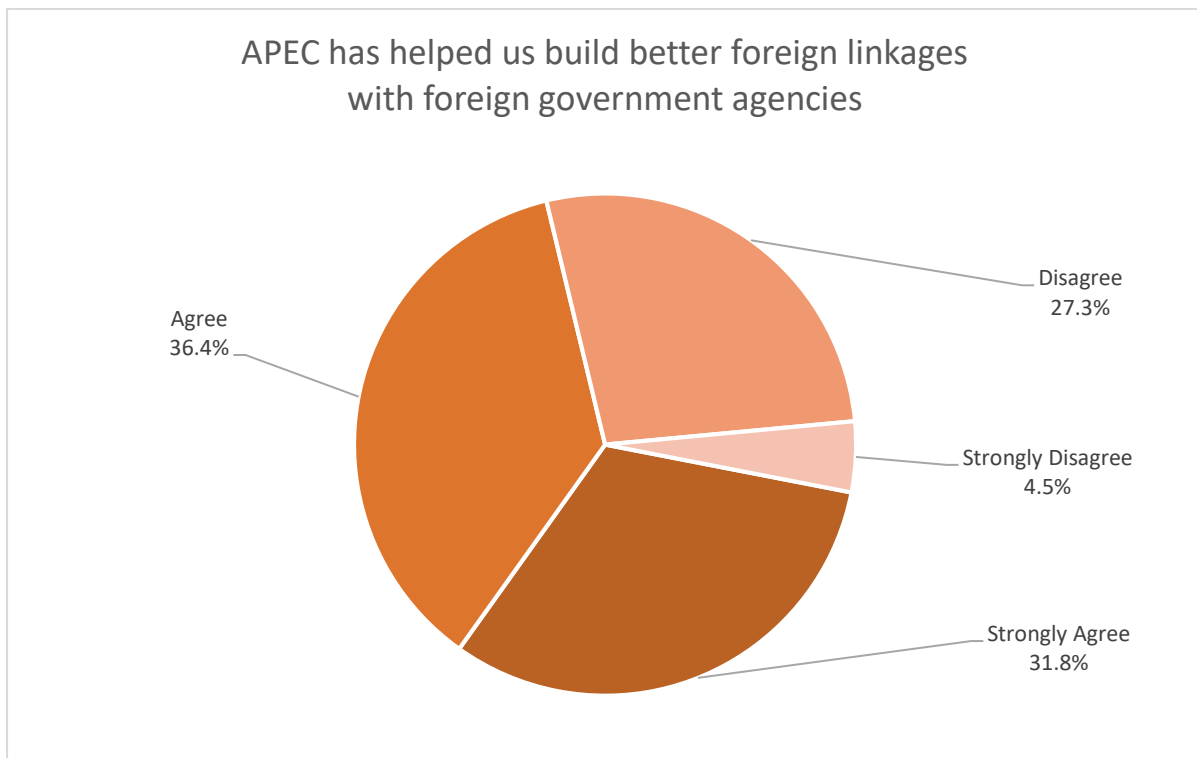
Figure 6 in Section 4.1 showed that 47.2 percent of respondents recognized that APEC has at least a determinable influence on them. Section 4.5.3 elaborates on this estimate by looking at how APEC has influenced stakeholders’ foreign linkages, policy influence, and inclusion of APEC to regular operations.

¹⁵ An online APEC Project Database is available in the APEC website, visit: <https://aimp2.apec.org/sites/PDB/FormServerTemplates/BasicSearch.aspx>

4.5.3.1 Foreign linkages

Given APEC's nature as a multi-regional platform, foreign linkages is understandably one of the expected opportunities to APEC economies. Figure 25 reveals that 68.2 percent of government agencies who responded to the online survey at least agrees that APEC has helped them build better foreign linkages with foreign government agencies in APEC. This suggests that APEC is deemed to be an effective platform for fostering new ties and developing existing ones.

Figure 25 Government agencies' response to APEC's role in fostering foreign linkages

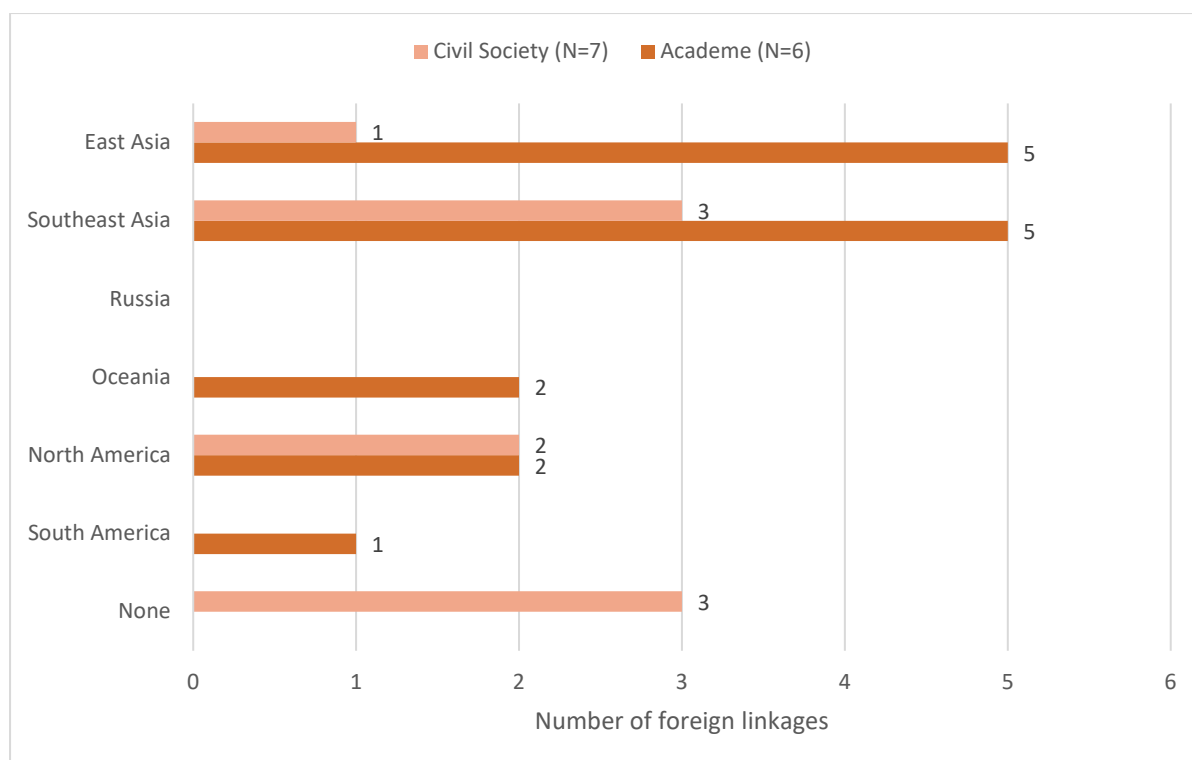


Source: Estimates based on the online APEC Perception Survey

Foreign linkages developed through APEC are not isolated to government agencies. Since there are events hosted by ABAC, and other related workshops and dialogues organized by other non-government stakeholders, APEC's influence to foreign linkages are widespread. For instance, Figure 26 shows that 5 out of 6 academic institutions have existing foreign linkages with another academic institution in APEC, particularly from East Asia and Southeast Asia. In addition, 2 out of 6 academic institutions also identified existing linkages in Oceania and North America while only one identified a linkage to South America.

Meanwhile, civil society organizations also identified foreign linkages in APEC economies, particularly in Southeast Asia. However, 3 out of 7 civil society organizations responded that they do not have any foreign linkage with another APEC economy.

Figure 26 Foreign linkages to another civil society organization or academe in APEC



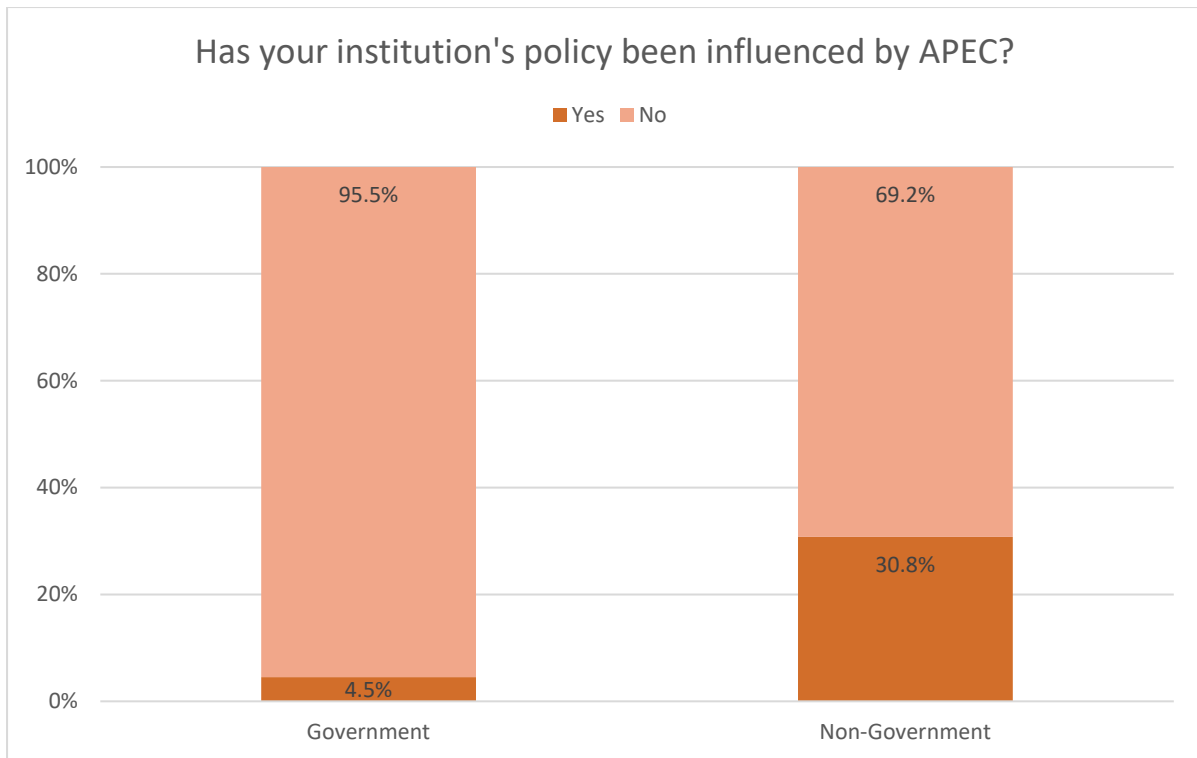
Source: Estimates based on the online APEC Perception Survey

4.5.3.2 Policy influence

Apart from developing foreign linkages with fellow APEC member economies, APEC is also an avenue for the exchange of ideas and information that can help develop domestic policies. However, Figure 27 reveals that only 4.5 percent of government agencies identify APEC as having influenced their agency’s policies. In effect, the larger 95.5 percent who answered no are unable to capitalize on the opportunity for information exchange in APEC.

Meanwhile, 30.8 percent of non-government institutions identified that APEC has been able to influence their institution’s policies. This is noticeably larger than the percentage registered for government agencies. In addition, one non-government institution mentioned that their participation in various fora, research initiatives, and other networking opportunities has expanded awareness and knowledge, which helped shape the formulation of initiatives in line with the five pillars of women economic empowerment. On another note, another non-government institution commented that objectively measuring APEC’s influence to their institution is difficult as APEC operates at a higher and broader level.

Figure 27 APEC's policy influence by affiliation



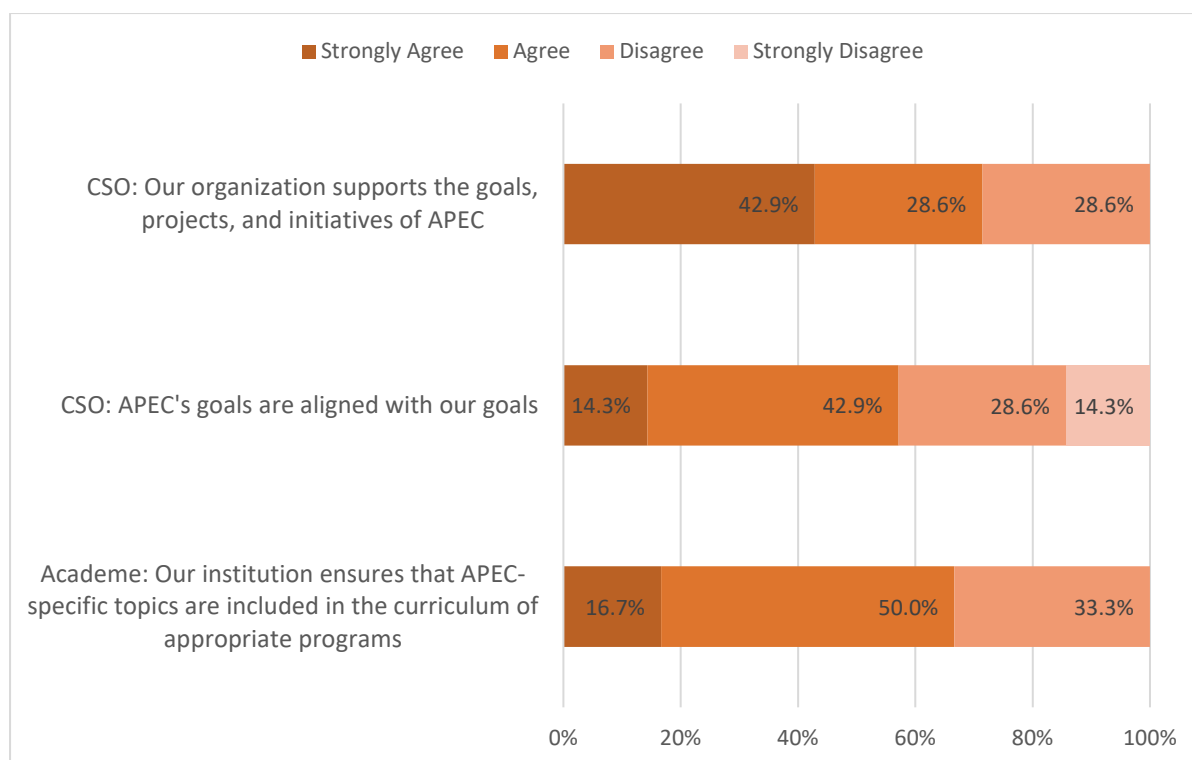
Source: Estimates based on the online APEC Perception Survey

4.5.3.3 Inclusion of APEC to regular operations

Since APEC provides opportunities for developing foreign linkages and for shaping domestic policies, it is noteworthy to understand how APEC and its related matters are included in the stakeholders' regular operations. In the academe, the majority of university faculty responded that they publish research papers about APEC (83.3%). For instance, respondents identified studies examining Philippine trade, Russia's turn to Southeast Asia, and trade liberalization in APEC's environmental goods, among others. Moreover, Figure 28 shows that when the academe was asked whether they agree that their institution ensures that APEC -specific topics are included in the curriculum of appropriate programs, 66.7 percent at least agreed.

In the case of civil society, Figure 28 shows that 71.5 percent at least agreed that their organization supports the goals, projects, and initiatives of APEC. In addition, 57.2 percent at least agreed that APEC's goals are aligned with their own goals. These two estimates would suggest that the majority of civil society organizations are receptive to and find that APEC's goals and initiatives are relevant to their own concerns. These estimates could provide an explanation to the observation made in Figure 27 wherein non-government institutions are found to be more amenable to policy influences from APEC.

Figure 28 Inclusion of APEC to regular operations of civil society and academe



Source: Estimates based on the online APEC Perception Survey

4.5.4 Perception on the APEC Business Travel Card¹⁶

The ABTC is APEC’s program to facilitate business mobility and travel in the APEC region. Mobility is encouraged by giving ABTC holders fast-track entry and exit through special APEC lanes at participating airports, and multiple, short-term entries to precleared APEC economies without having to make a separate visa application to fully participating member economies.

APEC economies can either be fully participating members or transitional members. The former refers to economies who participate in the preclearance aspect of the ABTC, which means that ABTC grantees are no longer required to file separate applications for a visa or entry permit when travelling across participating APEC economies. In contrast, ABTC grantees entering transitional member economies are required to obtain a visa or other similar entry document. Nonetheless, both types of ABTC members offer grantees access to the fast-track immigration lanes.

The program is participated in full by 19 economies, namely: Australia; Brunei Darussalam; Chile; China; Hong Kong, China; Indonesia; Japan; Korea, Rep. of; Malaysia; Mexico; New Zealand; Papua New Guinea; Peru; the Philippines; the Russian Federation; Singapore; Chinese Taipei; Thailand; and, Viet Nam. There are only two transitional members in APEC, which is Canada and the United States.

¹⁶ This section is heavily based on APEC’s online support for frequently asked questions for APEC Business Travel Card Clients, which can be viewed in full here: <https://www.apec.org/Groups/Committee-on-Trade-and-Investment/Business-Mobility-Group/ABTC/FAQ>

Table 2 shows key information about the ABTC as applied by each APEC member economy. All economies provide at least a five-year validity period for the ABTC but New Zealand can provide more. Generally, stays per visit is from 60 to 90 days, however, Russia applies a rule where ABTC holders can stay for only up to 90 days in a period of 180 days.

Interestingly, some APEC member economies allow ABTC holders to use their privileges for non-business purposes, such as tourism. These economies include: Australia; Brunei Darussalam; Chile; Hong Kong, China; the Republic of Korea; Papua New Guinea; Chinese Taipei; and, Thailand. Moreover, ABTC holders can use their privileges as entry for transit into all APEC economies, except Japan, although China and Mexico permit ABTC holders only if they are transiting for business purposes.

Table 2 ABTC economy entry information

Economy	Validity (years)	Stay per visit (days)	Tourism	Transit	Fast-lane access	Entry processing	Exit processing	Facilitation without pre-clearance
Australia	5	90	✓	✓	✓			✓
Brunei Darussalam	5	90	✓	✓	✓	✓		✓
Chile	5	90	✓	✓	✓	✓		-
China	5	60	✗	✓ ²	✓	✓	✓	✓
Hong Kong, China	5	60	✓	✓	✓	✓		✓
Indonesia	5	60	✗	✓	✓	✓		✗
Japan	5	90	✗	✗	✓			✓
Korea, Rep. of	5	90	✓	✓	✓	✓		✗
Malaysia	5	60	✗	✓	✓	✓	✓	-
Mexico	5	-	✗	✓ ²	✓	✓	✓	-
New Zealand	5+	90	✗	✓	✓	✓		✗
Papua New Guinea	5	60	✓	✓	✓	✓	✓	✗
Peru	5	90	✗	✓	✓	✓	✓	✗
Philippines	5	60	✗	✓	✓	✓		✗
Russia	5	90 ¹	✗	✓	✓	✓		✓
Singapore	5	60	✗	✓	✓	✓		✗
Chinese Taipei	5	90	✓	✓	✓	✓	✓	✗
Thailand	5	90	✓	✓	✓	✓		✓
Viet Nam	5	-	-	-	✓	✓	✓	-

Source: APEC. The Asia-Pacific Economic Cooperation Business Travel Card.

<https://www.apec.org/Groups/Committee-on-Trade-and-Investment/Business-Mobility-Group/ABTC> (accessed December 2019)

¹ Up to 90 days in a period of 180 days

² Conditions apply; permitted if transiting for business

The privileges offered by the ABTC program to facilitate better business mobility is beneficial. However, this is limited only to the extent that it may be granted to eligible applicants. The criteria applied depends on each APEC member economy, and these criteria can range from different levels of restrictiveness. For instance, Thailand¹⁷ requires that ABTC applicants are members of companies in the Chamber of Commerce of Thailand, the Federation of Thai Industries, or the Thai Bankers Association while the Philippines¹⁸ requires that ABTC applicants are “vested with powers and prerogatives to lay down and execute management

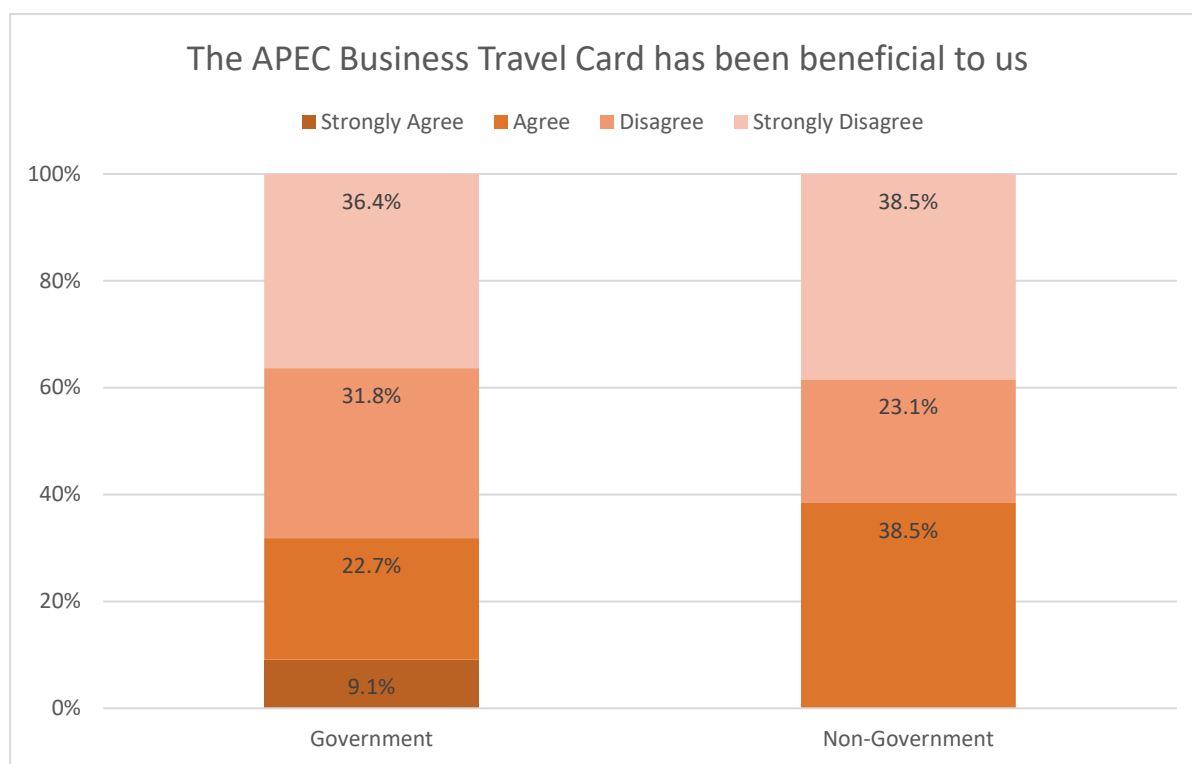
¹⁷ For Thailand’s requirements on the ABTC, see: <https://abtc-jscib.org/login-page.html>

¹⁸ For the Philippines’ requirements on the ABTC, see: <https://consular.dfa.gov.ph/visainformation/25-visa/226-apec-business-travel-card>

policies in furtherance of the primary business purpose of the business entity and hold specific authority to negotiate and commit to trade and investment activities; or, be an official nominated by the Chief Executive Officer, President, or Regional Head, whose work is directly involved in the trade of goods, the provision of services, or the conduct of investment activities when travelling overseas.” Annex 12 provides the requirements for the ABTC as applied by each member economy.

In the Philippines, however, Figure 29 shows that 61.6 percent of non-government institutions and 68.2 percent of government agencies find that the ABTC has not been beneficial to them. This suggests that while the issuance of an ABTC is limited only to top business representatives, it is possible that respondents perceive that the ABTC requirements could be relaxed to benefit more stakeholders.

Figure 29 Perception on the ABTC by affiliation



Source: Estimates based on the online APEC Perception Survey

4.6 Stakeholders’ opinion on the Post-2020 Vision for APEC

Respondents also provided their comments and opinion on the Post-2020 Vision for APEC. Figure 30 summarizes the respondents’ opinion into a word cloud. Digital issues, climate change, security, mobility, growth, protectionism, services, and China are among the most mentioned words by stakeholders. Interestingly, this supports the recommendations by the AVG, ABAC, and PECC where non-traditional security threats need APEC’s attention. Moreover, this is also aligned with the focus of APEC towards further digitalization.

Figure 30 Stakeholders' opinion on the post-2020 vision for APEC



Source: Word cloud based on the online APEC Perception Survey

5. Conclusion and Policy Recommendations

5.1 Conclusion

This study accomplished three things on measuring the perception of Philippine stakeholders, particularly by measuring their awareness of APEC, by identifying their perception on APEC's importance, influence, and relevance to the Philippines, and by providing insights on what Philippines stakeholders envision for APEC and the Philippines post-2020.

More than three-fourths of the online perception survey's respondents described themselves as being at least familiar of APEC. The majority of these respondents are from government and civil society. Moreover, about half recognized that APEC has at least a minimal determinable influence on them.

Respondents were asked about their perception on APEC's achievements to fulfill its trade liberalization, and regional connectivity and efficiency goals alongside its other goals. Stakeholders perceive that APEC has done an acceptable effort but can do more to reduce tariffs on APEC-listed environmental goods. Meanwhile, stakeholders were satisfied with APEC's effort to increase total trade in goods, strengthening people mobility, institutional ties, and networks, strengthening economic growth, and nurturing MSMEs. However, stakeholders

were less satisfied with APEC's efforts to reduce customs waiting time, developing green towns, enhancing social equity, and encouraging the development of clean technologies and supporting energy efficiency and renewable energy. Noticeably, APEC's economic goals were rated more highly compared to its environmental and social goals.

Furthermore, respondents were also asked about their participation and linkages to APEC. Generally, government agencies attended ECOTECH events (37.5%) followed by other APEC events (34.4%), CTI events (21.9%), and ABAC events (6.3%). Only 13.6 percent said that they did not attend any APEC event. This is noteworthy since the Philippines hosted APEC in 2015. Meanwhile, only 30.8 percent of non-government institutions attended ABAC events.

Apart from attending regular APEC events, member economies can also apply for project funding. During the 2019 project session 2, APEC's available funding totaled to USD9.9 million. The largest portion is in the ASF sub-fund comprising about three-fourths of the fund followed by the ASF general fund, the GPA, and the TILF. Interestingly, project funding for digital innovation and supply chain connectivity combined totals to 33.4 percent of the USD7.1 million total ASF sub-fund, which can suggest that APEC is moving towards understanding the digital economy. In the Philippines, only 36.4 and 15.4 percent of government agencies and non-government institutions have applied for funding.

Given APEC's nature as a multi-regional platform, foreign linkages is one opportunity member economies can avail. In the Philippines, 68.2 percent of government agencies at least agrees that APEC has helped them build better linkages. This would suggest that APEC is an effective platform for foreign linkages. In addition, practically all academic institutions had linkages with a foreign academic institution in APEC, mostly in East Asia and Southeast Asia. However, civil society had less linkages in APEC with existing ones concentrated in Southeast Asia.

Unfortunately, APEC's opportunity for shaping domestic policy is less appreciated. Only 4.5 percent of government agencies identified that APEC had an influence on their policies. This is noticeably lower than the 30.8 percent in non-government institutions. But while policy influences are weak, the majority of both academe and civil society at least agrees that APEC is included into their regular operations or is aligned with their organization's goals. This would suggest that appreciation of APEC exists despite weak policy influences.

Another noteworthy APEC program is the ABTC, which promotes a more efficient business mobility throughout APEC. However, the majority of stakeholders find that the ABTC has not been beneficial to them. This would suggest that while the issuance of an ABTC is limited only to top business representatives, it is possible that respondents perceive that the ABTC's requirements could be relaxed to benefit more.

Respondents were asked about how they envision APEC post-2020. Stakeholders are generally optimistic about the possibility that people and businesses can digitally interact and communicate easily with one another in APEC. This optimism could be related to APEC's initiatives to innovate and promote the digital ecosystem, which was formally recognized through the APEC Internet and Digital Economy Roadmap. However, environmental and social scenarios are met with less optimism, particularly in the possibility that APEC economies provide basic social protection and health services to migrant temporary workers from other APEC economies, and APEC effectively conserving and sustainably managing the region's biodiversity and natural resources. There would seem to be a consensus on the need to address environmental sustainability issues and social equity in APEC. Nonetheless, this perception exists despite APEC's efforts in recent years to promote a more environmentally

sustainable region. For example, APEC had a landmark agreement on identifying 54 environmental goods totaling to around USD600 billion in world trade, APEC member economies' commitment to reduce energy intensity in the region by 45.0 percent by 2030, and pursuing the development of Green Towns through the LCMT.

Meanwhile, stakeholders generally perceived that services needed increased priority, the highest of which is health and recreation services the lowest. Among product groups, stakeholders consistently identified vegetable products, textiles and wearing apparel, machinery and appliances, and vehicles and aircraft as needing increased priority. Plastics and rubber products, however, was consistently ranked the lowest product group by stakeholders.

5.2 Policy recommendations

This study revealed a number of observations, which support four policy recommendations. First, Philippine stakeholders can maximize the economy's participation to APEC by adopting policies and best practices applicable for the Philippines. The weak appreciation of APEC's potential for policy influence was observed in this study.

Second, participation by Philippine stakeholders in seeking for APEC project funding could be strengthened through regular information dissemination activities and relevant government support. This can also provide academic institutions with the opportunity to access funding for research.

Third, the limited awareness on APEC must be addressed through information dissemination activities. This study showed that perception on APEC's effort to accomplish environmental and social goals and scenarios are less appreciated than with trade and investment. But APEC has been taking significant steps to develop a more environmentally sustainable region. This contrast would suggest that awareness on APEC's environmental and social accomplishments has limited awareness among Philippine stakeholders.

Fourth, the requirements on the issuance of an ABTC for Philippine citizens could undergo a review since Philippine stakeholders generally find that the ABTC is less beneficial than it is hoped to be. A comparative study on how APEC member economies apply and issue ABTCs could be helpful.

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Annexes

Annex 1 Online perception survey questions

Page 3 (Contact Information)

Q1. Contact Information

- Position
- Complete Institution Name, without abbreviations (include bureau/sub-branch, if applicable)
- City / Municipality
- Province
- Valid Email Address
- Valid Office Phone Number (include area code)

Page 4 (Perception Survey on APEC for the Philippines)

Q1. Affiliation

Q2. What is the extent of your familiarity of APEC, including their goals, history, development, and overall activities and events?

Q3. With your knowledge and familiarity, would you say that the Philippines has benefitted from being a member of APEC?

Q4. In your opinion, how has APEC performed in achieving its trade liberalization goals?

Q5. In your opinion, how has APEC performed in achieving a more connected and efficient region?

Q6. In your opinion, how has APEC performed in achieving its other goals?

Q7. In your opinion, what is the probability that the following scenarios will happen for APEC after 2020?

Q8. In your opinion, what level of priority should the Philippines place on the following items, Post-2020? For reference, the groupings include, in parentheses, related chapters based on the 2015 Philippine Standard Commodity Classification (PSCC).

Q9. In your opinion, what level of priority should the Philippines place on the following items, Post-2020? For reference, the groupings include, in parentheses, related chapters based on the 2015 Philippine Standard Commodity Classification (PSCC).

Q10. In your opinion, what level of priority should the Philippines place on the following items, Post-2020?

Page 5 (Government Sector)

Q1. What are the APEC working group/s that your agency has regularly been a part of in the past five (5) years? (Tick all items that apply)

Q2. What are the APEC meetings that your agency has regularly attended in the past five (5) years?

Q3. What are the APEC dialogues that your agency has regularly attended in the past five (5) years? (Tick all items that apply)

Q4. How would you describe the role and influence that APEC has with your agency?

Q5. To what extent do you agree with the following statement: "APEC has helped our agency build better foreign linkages with foreign government agencies."

Q6. To what extent do you agree with the following statement: "The APEC Business Travel Card has been beneficial to our agency."

Q7. Has your agency applied for funding through APEC in the past five (5) years? Please identify three (3), at most. Indicate "None" if none.

Q8. Has your agency's participation to APEC influenced any of your agency's policy in the past five (5) years? Please identify three (3), at most. Indicate "None" if none.

Q9. What challenges does your agency foresee in the APEC region after 2020?

Q10. If you have other comments not answerable by any of the previous questions, please feel free to write them below.

Page 6 (Business Sector)

Q1. What are the APEC dialogues/working groups that your company or firm has regularly attended in the past five (5) years? (Tick all items that apply)

Q2. Which of the following APEC member economies is your company or firm **exporting to**? (Tick all items that apply)

- Q3. Using the Tariff Commission's Tariff Book (AHTN 2017 edition), which product group/s do your company or firm **export**? (Tick all items that apply)
- Q4. Which of the following APEC member economies is your company or firm **importing from**? (Tick all items that apply)
- Q5. Using the Tariff Commission's Tariff Book (AHTN 2017 edition), which product group/s do your company or firm **import**?
- Q6. How would you describe the role and influence that APEC has with your company or firm?
- Q7. To what extent do you agree with the following statement: "APEC has helped our company or firm build better foreign linkages."
- Q8. To what extent do you agree with the following statement: "The APEC Business Travel Card has been beneficial to our company or firm."
- Q9. What challenges does your company or firm foresee in the APEC region after 2020?
- Q10. If you have other comments not answerable by any of the previous questions, please feel free to write them below.

Page 7 (Academe Sector)

- Q1. What are the APEC dialogues/working groups that your academic institution has regularly attended in the past five (5) years? (Tick all items that apply)
- Q2. Which of the following APEC member economies do you have a formal engagement with a foreign academic institution, which could include student-exchange programs, joint degrees, or research collaborations, among others? (Tick all items that apply)
- Q3. How would you describe the role and influence that APEC has with your academic institution?
- Q4. To what extent do you agree with the following statement: "Our academic institution ensures that APEC-specific topics are included in the curriculum of appropriate programs."
- Q5. To what extent do you agree with the following statement: "The APEC Business Travel Card has been beneficial to our academic institution."
- Q6. Has your academic institution's full-time faculty been able to publish research papers, whether published in a peer-reviewed journal or not, related to APEC in the past five (5) years? Please identify three (3), at most. Indicate "None" if none.
- Q7. Has your academic institution applied for funding through APEC in the past five (5) years? Please identify three (3), at most. Indicate "None" if none.
- Q8. Has your academic institution's participation to APEC influenced any of your academic institution's policy in the past five (5) years? Please identify three (3), at most. Indicate "None" if none.
- Q9. What challenges does your academic institution foresee in the APEC region after 2020?
- Q10. If you have other comments not answerable by any of the previous questions, please feel free to write them below.

Page 8 (Civil Society Organization / Non-Governmental Organization Sector)

- Q1. What are the APEC dialogues/working groups that your organization has regularly attended in the past five (5) years? (Tick all items that apply)
- Q2. Which of the following APEC member economies do you have a formal engagement with a foreign CSO/NGO, which could include project collaborations, partnerships, or network co-membership, among others? (Tick all items that apply)
- Q3. How would you describe the role and influence that APEC has with your organization?
- Q4. To what extent do you agree with the following statement: "APEC's goals are aligned with our organization's goals."
- Q5. To what extent do you agree with the following statement: "The APEC Business Travel Card has been beneficial to our organization."
- Q6. To what extent do you agree with the following statement: "Our organization supports the goals, projects, and initiatives of APEC."
- Q7. Has your organization applied for funding through APEC in the past five (5) years? Please identify three (3), at most. Indicate "None" if none.
- Q8. Has your organization's participation to APEC influenced any of your organization's policy in the past five (5) years? Please identify three (3), at most. Indicate "None" if none.
- Q9. What challenges does your organization foresee in the APEC region after 2020?
- Q10. If you have other comments not answerable by any of the previous questions, please feel free to write them below.

Page 9 (Youth Group / Student Organization Sector)

Q1. What are the APEC events that your organization has attended in the past five (5) years?

Q2. Which of the following APEC member economies do you have a formal engagement with a foreign organization, which could include project collaborations, partnerships, or network co-membership, among others? (Tick all items that apply)

Q3. How would you describe the role and influence that APEC has with your organization?

Q4. To what extent do you agree with the following statement: "APEC's goals are aligned with our organization's goals."

Q5. To what extent do you agree with the following statement: "APEC has helped our organization build better foreign linkages."

Q6. To what extent do you agree with the following statement: "Our organization believes that APEC provides sufficient support for the youth."

Q7. Has your organization conducted programs and/or activities related to APEC in the past five (5) years? Please identify three (3), at most. Indicate "None" if none.

Q8. Has your organization applied for funding through APEC in the past five (5) years? Please identify three (3), at most. Indicate "None" if none.

Q9. What challenges does your organization foresee in the APEC region after 2020?

Q10. If you have other comments not answerable by any of the previous questions, please feel free to write them below.

Source: Authors' online perception survey questionnaire

Annex 2 Respondent profile

Item	Stakeholder Group				
	Government	Business	Academe	CSO	Total
Total Respondents	31 (55.4)	2 (3.6)	9 (16.1)	14 (25.0)	56 (100.0)
Location					
Balance Luzon	7 (22.6)	-	2 (22.2)	-	9 (16.1)
Metropolitan Manila	24 (77.4)	2 (100.0)	3 (33.3)	13 (92.9)	42 (75.0)
Visayas	-	-	3 (33.3)	-	3 (5.4)
Mindanao	-	-	1 (11.1)	1 (7.1)	2 (3.6)
Familiarity of APEC					
Highly familiar (76-100)	7 (22.6)	1 (50.0)	4 (44.4)	5 (35.7)	17 (30.4)
Familiar (51-75)	18 (58.1)	-	4 (44.4)	4 (28.6)	26 (46.4)
Somewhat familiar (26-50)	5 (16.1)	1 (50.0)	-	5 (35.7)	11 (19.6)
Not familiar (0-25)	1 (3.2)	-	1 (11.1)	-	2 (3.6)
Perception on Philippines' benefit from APEC					
Highly benefited (76-100)	14 (45.2)	2 (100.0)	3 (33.3)	5 (35.7)	24 (42.9)
Benefited (51-75)	17 (54.8)	-	5 (55.6)	5 (35.7)	27 (48.2)
Somewhat benefited (26-50)	-	-	1 (11.1)	3 (21.4)	4 (7.1)
Did not benefit (0-25)	-	-	-	1 (7.1)	1 (1.8)
Role and influence of APEC					
Total Respondents	22 (61.1)	1 (2.8)	6 (16.7)	7 (19.4)	36 (100.0)
No determinable influence (=1)	1 (4.6)	-	-	2 (28.6)	3 (8.3)
Minimal determinable influence (=2)	9 (40.9)	-	5 (83.3)	2 (28.6)	16 (44.4)
Determinable influence (=3)	10 (45.5)	-	1 (16.7)	3 (42.9)	14 (38.9)
Significant influence (=4)	2 (9.1)	1 (100.0)	-	-	3 (8.3)

Source: Estimates based on the Online APEC Perception Survey

Note: Percentage to total respondents are in parentheses.

Annex 3 Perception on APEC achievements, respondents familiar of APEC by perception of the Philippines' APEC benefit

Item	Highly Benefited	Non-Highly Benefited	Total
Total Respondents	22	21	43
Trade Liberalization Goals			
Increase total trade in goods	3.4 (1)	3.3 (1)	3.4 (2)
Increase total trade in services	3.4 (0)	3.2 (2)	3.3 (2)
Reduce tariff rates	3.2 (3)	2.8 (3)	3.0 (6)
Promote regional economic integration	3.4 (0)	3.2 (0)	3.3 (0)
Lowering trade transaction costs	3.0 (2)	2.9 (3)	3.0 (5)
Reduce costs for importers	3.2 (3)	3.1 (3)	3.2 (6)
Reduce costs for exporters	3.3 (4)	2.8 (2)	3.0 (6)
Reduce tariffs on APEC-listed 'environmental goods'	3.1 (5)	3.1 (2)	3.1 (7)
Regional Connectivity and Efficiency Goals			
Reduce the customs waiting time	2.8 (4)	2.8 (1)	2.8 (5)
Improved the ease of doing business	3.1 (1)	2.9 (0)	3.0 (1)
Implement reforms to regulatory and government systems	3.0 (1)	2.8 (0)	2.9 (1)
Improved transparency, competition, and markets	3.1 (0)	3.0 (1)	3.1 (1)
Strengthen physical infrastructure linkages	3.1 (2)	2.7 (0)	2.9 (2)
Strengthen people mobility, institutional ties, and networks	3.2 (1)	3.1 (0)	3.2 (1)
Support a more efficient regional supply chain	2.9 (0)	3.0 (0)	2.9 (0)
Other APEC Goals			
Strengthen economic growth	3.4 (0)	3.0 (0)	3.2 (0)
Promoting global trade in APEC-listed 'environmental goods'	3.0 (1)	2.9 (0)	3.0 (1)
Encourage the development of clean technologies and support energy efficiency and renewable energy	2.9 (1)	2.6 (0)	2.8 (1)
Develop 'Green Towns'	2.4 (3)	2.3 (1)	2.3 (4)
Pursuing inclusive growth	3.2 (1)	2.9 (0)	3.1 (1)
Nurturing micro, small, and medium enterprises (MSMEs)	3.3 (1)	3.0 (2)	3.2 (3)
Enhancing social equity	2.9 (2)	2.5 (0)	2.7 (2)

Source: Estimates based on the Online APEC Perception Survey

Note: Mean scores with the following interpretations: APEC has not done anything (=1); APEC has done minimal effort (=2); APEC has done an acceptable effort but can do more (=3); APEC has done a satisfactory effort (=4). The number of respondents that answered "I do not know" for each item are in parentheses.

Annex 4 Perception on APEC achievements, respondents familiar of APEC by location

Item	NCR	non-NCR	Total
Total Respondents	32	11	43
Trade Liberalization Goals			
Increase total trade in goods	3.4 (2)	3.1 (0)	3.3 (2)
Increase total trade in services	3.1 (2)	2.8 (0)	3.0 (2)
Reduce tariff rates	3.3 (3)	3.3 (2)	3.3 (5)
Promote regional economic integration	3.0 (0)	2.6 (0)	2.9 (0)
Lowering trade transaction costs	3.2 (2)	2.8 (3)	3.1 (5)
Reduce costs for importers	3.2 (3)	2.7 (3)	3.1 (6)
Reduce costs for exporters	3.1 (4)	2.8 (2)	3.0 (6)
Reduce tariffs on APEC-listed 'environmental goods'	3.4 (5)	3.3 (2)	3.4 (7)
Regional Connectivity and Efficiency Goals			
Reduce the customs waiting time	2.8 (4)	2.8 (1)	2.8 (5)
Improved the ease of doing business	3.1 (1)	2.7 (0)	3.0 (1)
Implement reforms to regulatory and government systems	2.9 (1)	2.8 (0)	2.9 (1)
Improved transparency, competition, and markets	3.1 (0)	2.8 (1)	3.0 (1)
Strengthen physical infrastructure linkages	2.9 (2)	2.8 (0)	2.9 (2)
Strengthen people mobility, institutional ties, and networks	3.2 (1)	3.1 (0)	3.2 (1)
Support a more efficient regional supply chain	2.9 (0)	2.8 (0)	2.9 (0)
Other APEC Goals			
Strengthen economic growth	3.3 (0)	2.8 (0)	3.2 (0)
Promoting global trade in APEC-listed 'environmental goods'	3.1 (1)	2.6 (0)	3.0 (1)
Encourage the development of clean technologies and support energy efficiency and renewable energy	2.8 (1)	2.4 (0)	2.7 (1)
Develop 'Green Towns'	2.5 (4)	2.0 (0)	2.4 (4)
Pursuing inclusive growth	3.1 (1)	2.7 (0)	3.0 (1)
Nurturing micro, small, and medium enterprises (MSMEs)	3.3 (2)	2.7 (1)	3.2 (3)
Enhancing social equity	2.8 (2)	2.4 (0)	2.7 (2)

Source: Estimates based on the Online APEC Perception Survey

Note: Mean scores with the following interpretations: APEC has not done anything (=1); APEC has done minimal effort (=2); APEC has done an acceptable effort but can do more (=3); APEC has done a satisfactory effort (=4). The number of respondents that answered "I do not know" for each item are in parentheses.

Annex 5 Perception on APEC achievements, respondents familiar of APEC by affiliation

Item	Government	non-Government	Total
Total Respondents	25	18	43
Trade Liberalization Goals			
Increase total trade in goods	3.5 (2)	3.2 (0)	3.4 (2)
Increase total trade in services	3.5 (2)	3.1 (0)	3.3 (2)
Reduce tariff rates	3.1 (4)	2.9 (2)	3.0 (6)
Promote regional economic integration	3.4 (4)	3.3 (0)	3.4 (4)
Lowering trade transaction costs	3.2 (4)	2.6 (1)	2.9 (5)
Reduce costs for importers	3.2 (4)	3.0 (2)	3.1 (6)
Reduce costs for exporters	3.2 (4)	2.9 (2)	3.1 (6)
Reduce tariffs on APEC-listed 'environmental goods'	3.3 (4)	2.7 (3)	3.1 (7)
Regional Connectivity and Efficiency Goals			
Reduce the customs waiting time	3.0 (1)	2.4 (4)	2.8 (5)
Improved the ease of doing business	3.0 (1)	2.9 (0)	3.0 (1)
Implement reforms to regulatory and government systems	3.1 (0)	2.6 (1)	2.9 (1)
Improved transparency, competition, and markets	3.2 (1)	2.8 (0)	3.0 (1)
Strengthen physical infrastructure linkages	2.9 (2)	2.8 (0)	2.9 (2)
Strengthen people mobility, institutional ties, and networks	3.3 (0)	2.9 (1)	3.1 (1)
Support a more efficient regional supply chain	3.1 (0)	2.7 (0)	2.9 (0)
Other APEC Goals			
Strengthen economic growth	3.4 (0)	3.0 (0)	3.2 (0)
Promoting global trade in APEC-listed 'environmental goods'	3.0 (0)	2.8 (1)	2.9 (1)
Encourage the development of clean technologies and support energy efficiency and renewable energy	2.8 (1)	2.6 (0)	2.7 (1)
Develop 'Green Towns'	2.4 (2)	2.2 (2)	2.3 (4)
Pursuing inclusive growth	3.2 (0)	2.8 (1)	3.0 (1)
Nurturing micro, small, and medium enterprises (MSMEs)	3.3 (2)	3.0 (1)	3.2 (3)
Enhancing social equity	2.9 (1)	2.4 (1)	2.7 (2)

Source: Estimates based on the Online APEC Perception Survey

Note: Mean scores with the following interpretations: APEC has not done anything (=1); APEC has done minimal effort (=2); APEC has done an acceptable effort but can do more (=3); APEC has done a satisfactory effort (=4). The number of respondents that answered "I do not know" for each item are in parentheses.

Annex 6 Perception on post-2020 APEC, respondents familiar of APEC by their perception of the Philippines' APEC benefit

Item	Highly Benefited	non-Highly Benefited	Total
Total Respondents	22	21	43
Goods, services, and businesses can move easily among APEC economies	3.3 (0)	3.0 (0)	3.2 (0)
Regulations and procedures make it easy for skilled workers and professionals to find work in other APEC economies	2.9 (0)	2.7 (0)	2.8 (0)
APEC economies provide basic social protection and health services to migrant and temporary workers from other APEC economies	2.8 (0)	2.6 (0)	2.7 (0)
It is easy to physically move around through roads, railways, air, and shipping in APEC	3.2 (0)	2.9 (0)	3.1 (0)
People and businesses can digitally interact and communicate easily with one another in APEC	3.5 (0)	3.1 (0)	3.3 (0)
APEC effectively conserves and sustainably manages the region's biodiversity and natural resources	2.9 (1)	2.6 (0)	2.8 (0)
APEC has a strong voice and are important players in global negotiations and fora	3.2 (0)	2.9 (0)	3.1 (0)

Source: Estimates based on the Online APEC Perception Survey

Note: Mean scores with the following interpretations: Not likely at all (=1); Minimal chance of happening given business-as-usual conditions (=2); Acceptable chance of happening but requires effort and change (=3); Sufficient chance of happening given business-as-usual conditions (=4). The number of respondents that answered “I do not know” for each item are in parentheses.

Annex 7 Perception on post-2020 APEC, respondents familiar of APEC by location

Item	NCR	non-NCR	Total
Total Respondents	32	11	43
Goods, services, and businesses can move easily among APEC economies	3.2 (0)	2.8 (0)	3.1 (0)
Regulations and procedures make it easy for skilled workers and professionals to find work in other APEC economies	2.8 (0)	2.6 (0)	2.7 (0)
APEC economies provide basic social protection and health services to migrant and temporary workers from other APEC economies	2.8 (0)	2.4 (0)	2.7 (0)
It is easy to physically move around through roads, railways, air, and shipping in APEC	3.1 (0)	2.8 (0)	3.0 (0)
People and businesses can digitally interact and communicate easily with one another in APEC	3.4 (0)	3.3 (0)	3.4 (0)
APEC effectively conserves and sustainably manages the region's biodiversity and natural resources	2.8 (1)	2.6 (0)	2.7 (1)
APEC has a strong voice and are important players in global negotiations and fora	3.1 (0)	2.9 (0)	3.0 (0)

Source: Estimates based on the Online APEC Perception Survey

Note: Mean scores with the following interpretations: Not likely at all (=1); Minimal chance of happening given business-as-usual conditions (=2); Acceptable chance of happening but requires effort and change (=3); Sufficient chance of happening given business-as-usual conditions (=4). The number of respondents that answered “I do not know” for each item are in parentheses.

Annex 8 Perception on post-2020 APEC, respondents familiar of APEC by affiliation

Item	Government	non-Government	Total
Total Respondents	25	18	43
Goods, services, and businesses can move easily among APEC economies	3.2 (0)	2.9 (0)	3.1 (0)
Regulations and procedures make it easy for skilled workers and professionals to find work in other APEC economies	2.8 (0)	2.7 (0)	2.8 (0)
APEC economies provide basic social protection and health services to migrant and temporary workers from other APEC economies	2.9 (0)	2.4 (0)	2.7 (0)
It is easy to physically move around through roads, railways, air, and shipping in APEC	3.2 (0)	2.8 (0)	3.0 (0)
People and businesses can digitally interact and communicate easily with one another in APEC	3.5 (0)	3.2 (0)	3.4 (0)
APEC effectively conserves and sustainably manages the region's biodiversity and natural resources	3.0 (1)	2.5 (0)	2.7 (1)
APEC has a strong voice and are important players in global negotiations and for a	3.2 (0)	2.8 (0)	3.0 (0)

Source: Estimates based on the Online APEC Perception Survey

Note: Mean scores with the following interpretations: Not likely at all (=1); Minimal chance of happening given business-as-usual conditions (=2); Acceptable chance of happening but requires effort and change (=3); Sufficient chance of happening given business-as-usual conditions (=4). The number of respondents that answered “I do not know” for each item are in parentheses.

Annex 9 Perception on post-2020 APEC priorities, respondents familiar of APEC by perception of the Philippines' APEC benefit

Item	Highly Benefited	non-Highly Benefited	Total
Total Respondents	22	21	43
Goods			
Live animals and animal products (Ch. 1-5)	2.5 (3)	2.4 (1)	2.4 (4)
Vegetable products (Ch.6-14)	2.6 (3)	2.6 (1)	2.6 (4)
Animal or vegetable fats and oils (Ch. 15)	2.5 (3)	2.4 (1)	2.4 (4)
Prepared foodstuffs (Ch. 16-24)	2.6 (3)	2.4 (1)	2.5 (4)
Mineral products (Ch. 25-27)	2.4 (5)	2.2 (4)	2.3 (9)
Chemical products (Ch. 28-38)	2.4 (4)	2.2 (1)	2.3 (5)
Plastics and rubber products (Ch. 39-40)	2.1 (4)	2.1 (1)	2.1 (5)
Textiles, wearing apparel, and related products (Ch. 41-43 and 50-67)	2.5 (3)	2.8 (1)	2.7 (4)
Wood and paper products (Ch. 44-49)	2.6 (4)	2.3 (1)	2.4 (5)
Stone and metal products (Ch. 68-83)	2.2 (7)	2.5 (1)	2.4 (8)
Vehicles, aircraft, and related products (Ch. 86-89)	2.9 (2)	2.7 (1)	2.8 (3)
Machinery, appliances, and related products (Ch. 84-85 and 90-91)	2.8 (2)	2.6 (1)	2.7 (3)
Recreational products (Ch. 92, 95, and 97)	2.4 (3)	2.4 (1)	2.4 (4)
Miscellaneous manufactured articles (Ch. 93, 94, and 96)	2.2 (7)	2.4 (1)	2.3 (8)
Services			
Financial and insurance	2.9 (0)	2.9 (0)	2.9 (0)
Information and communications technology	2.9 (1)	3.0 (0)	3.0 (1)
Public administration and defense	2.8 (1)	2.8 (0)	2.8 (1)
Health	3.0 (0)	3.0 (0)	3.0 (0)
Education	3.0 (0)	3.0 (0)	3.0 (0)
Recreation	2.5 (0)	2.6 (0)	2.5 (0)

Source: Estimates based on the Online APEC Perception Survey

Note: Mean scores with the following interpretations: Decreased level of priority (=1); Maintain level of priority from status quo (=2); Increased level of priority from status quo (=3). The number of respondents that answered "I do not know" for each item are in parentheses.

Annex 10 Perception on post-2020 APEC priorities, respondents familiar of APEC by location

Item	NCR	non-NCR	Total
Total Respondents	32	11	43
Goods			
Live animals and animal products (Ch. 1-5)	2.4 (4)	2.5 (0)	2.4 (4)
Vegetable products (Ch.6-14)	2.5 (4)	2.7 (0)	2.6 (4)
Animal or vegetable fats and oils (Ch. 15)	2.4 (4)	2.5 (0)	2.4 (4)
Prepared foodstuffs (Ch. 16-24)	2.5 (4)	2.5 (0)	2.5 (4)
Mineral products (Ch. 25-27)	2.4 (7)	2.1 (2)	2.3 (9)
Chemical products (Ch. 28-38)	2.3 (5)	2.4 (0)	2.3 (5)
Plastics and rubber products (Ch. 39-40)	2.1 (5)	2.1 (0)	2.1 (5)
Textiles, wearing apparel, and related products (Ch. 41-43 and 50-67)	2.6 (4)	2.7 (0)	2.6 (4)
Wood and paper products (Ch. 44-49)	2.4 (5)	2.5 (0)	2.4 (5)
Stone and metal products (Ch. 68-83)	2.4 (7)	2.3 (1)	2.4 (8)
Vehicles, aircraft, and related products (Ch. 86-89)	2.7 (3)	2.8 (0)	2.7 (3)
Machinery, appliances, and related products (Ch. 84-85 and 90-91)	2.7 (3)	2.5 (0)	2.6 (3)
Recreational products (Ch. 92, 95, and 97)	2.3 (4)	2.5 (0)	2.4 (4)
Miscellaneous manufactured articles (Ch. 93, 94, and 96)	2.3 (7)	2.4 (1)	2.3 (8)
Services			
Financial and insurance	2.9 (0)	2.8 (0)	2.9 (0)
Information and communications technology	2.9 (1)	3.0 (0)	2.9 (1)
Public administration and defense	2.8 (1)	2.7 (0)	2.8 (1)
Health	3.0 (0)	3.0 (0)	3.0 (0)
Education	3.0 (0)	2.9 (0)	3.0 (0)
Recreation	2.5 (0)	2.5 (0)	2.5 (0)

Source: Estimates based on the Online APEC Perception Survey

Note: Mean scores with the following interpretations: Decreased level of priority (=1); Maintain level of priority from status quo (=2); Increased level of priority from status quo (=3). The number of respondents that answered “I do not know” for each item are in parentheses.

Annex 11 Perception on post-2020 APEC priorities, respondents familiar of APEC by affiliation

Item	Government	non-Government	Total
Total Respondents	25	18	43
Goods			
Live animals and animal products (Ch. 1-5)	2.4 (3)	2.4 (1)	2.4 (4)
Vegetable products (Ch.6-14)	2.6 (3)	2.6 (1)	2.6 (4)
Animal or vegetable fats and oils (Ch. 15)	2.5 (3)	2.4 (1)	2.5 (4)
Prepared foodstuffs (Ch. 16-24)	2.4 (3)	2.6 (1)	2.5 (4)
Mineral products (Ch. 25-27)	2.4 (6)	2.2 (3)	2.4 (9)
Chemical products (Ch. 28-38)	2.1 (4)	2.5 (1)	2.2 (5)
Plastics and rubber products (Ch. 39-40)	1.9 (4)	2.4 (1)	2.0 (5)
Textiles, wearing apparel, and related products (Ch. 41-43 and 50-67)	2.6 (4)	2.7 (0)	2.6 (4)
Wood and paper products (Ch. 44-49)	2.3 (4)	2.6 (1)	2.4 (5)
Stone and metal products (Ch. 68-83)	2.4 (5)	2.3 (3)	2.4 (8)
Vehicles, aircraft, and related products (Ch. 86-89)	2.8 (3)	2.7 (0)	2.8 (3)
Machinery, appliances, and related products (Ch. 84-85 and 90-91)	2.6 (3)	2.7 (0)	2.6 (3)
Recreational products (Ch. 92, 95, and 97)	2.3 (3)	2.5 (1)	2.4 (4)
Miscellaneous manufactured articles (Ch. 93, 94, and 96)	2.3 (5)	2.3 (3)	2.3 (8)
Services			
Financial and insurance	2.9 (0)	2.9 (0)	2.9 (0)
Information and communications technology	2.9 (0)	3.0 (1)	2.9 (1)
Public administration and defense	2.8 (0)	2.8 (1)	2.8 (1)
Health	3.0 (0)	2.9 (0)	3.0 (0)
Education	2.9 (0)	3.0 (0)	2.9 (0)
Recreation	2.4 (0)	2.7 (0)	2.5 (0)

Source: Estimates based on the Online APEC Perception Survey

Note: Mean scores with the following interpretations: Decreased level of priority (=1); Maintain level of priority from status quo (=2); Increased level of priority from status quo (=3). The number of respondents that answered “I do not know” for each item are in parentheses.

APEC Economy	Requirements
Australia	<p>To be eligible, the applicant must be:</p> <ul style="list-style-type: none"> ▪ traveling frequently to an APEC economy (other than Australia or their place of residence) for business purposes; ▪ have not been convicted of a criminal offense; and, ▪ the applicant must be one of the following: <ul style="list-style-type: none"> ○ the Chief Executive Officer (CEO), Chief Financial Officer (CFO), or regional or country head of a registered business entity; ○ an owner or director of a registered business entity; ○ a board member of a registered business entity; ○ the CEO or CFO of an Australian-based business peak body; ○ a Vice-President, Executive, Director, Senior Manager or similar; ○ an employee of a registered business entity nominated by the CEO, CFO, regional head, owner, or director of the organization; or, ○ a senior government official (i.e., member of the Australian Public Service who is at the Senior Executive Service level or above, or a state/territory equivalent) <p>Further, the business entity or Australian-based peak business body must be engaged in international trade or investment between APEC economies. Furthermore, businesses are considered engaged in trade or investment between APEC economies if the business:</p> <ul style="list-style-type: none"> ▪ has received an Export Market Development Grant from Austrade in the past five years; ▪ has been a finalist in the Australian Export Awards in the past five years; ▪ is listed on the current Forbes Global 2000 business list; ▪ is an accredited Australian Trusted Trader; or, ▪ a lawfully registered business in the economy in which it is operating and is either trading goods, services, or conducting investment activities between APEC economies or if the business is a start-up operation. <p>Source: Department of Home Affairs. Asia-Pacific Economic Cooperation (APEC) Business Travel Card (ABTC) for Australian citizens. https://immi.homeaffairs.gov.au/entering-and-leaving-australia/business-travel-card/australian-citizens (accessed December 2019)</p>
Brunei Darussalam	<p>To be eligible, the applicant must be:</p> <ul style="list-style-type: none"> ▪ passport holders of participating economies; ▪ travels regularly to conduct trade and investment activities in those economies; ▪ have not been convicted of a criminal offense <p>Source: Immigration and National Registration Department, Ministry of Home Affairs. APEC Business Travel Card. http://www.immigration.gov.bn/Borang%20PDF/APEC.pdf (accessed December 2019)</p>
Canada	<p>To be eligible, the applicant must be:</p> <ul style="list-style-type: none"> ▪ NEXUS members (applicable to Canadian citizens) <p>The Canada Border Services Agency described the NEXUS as “a bi-national, Canada-United States program for pre-approved, low-risk travelers entering Canada or the United States at designated air, land, and marine ports of entry. The program enables its members to enter either country more quickly and easily by using automated self-serve kiosks in the air mode of travel, dedicated lanes in the land mode of travel, and by calling Telephone Reporting Centres prior to arrival in the marine mode of travel.”</p> <p>Source: Canada Border Services Agency. Asia-Pacific Economic Cooperation Business Travel Card. https://www.cbsa-asfc.gc.ca/prog/abtc-cvaa/menu-eng.html (accessed December 2019)</p>

Chile	<p>To be eligible, the applicant must be:</p> <ul style="list-style-type: none"> ▪ a Chilean citizen; ▪ have a valid, ordinary or official Chilean passport; ▪ Not have been prosecuted or convicted of crimes that the law qualifies as a crime or simple crime; ▪ be a business person or government official related to the business or activities of the APEC forum; ▪ not have a negative business history. <p>Further, a business person shall be understood as one who is dedicated or related to the trade of goods, the provision of services, or the performance of productive economic, financial, or investment activities, and which requires travelling for short periods within the region of the Asia-Pacific for these purposes.</p> <p>Source: Departamento de Extranjeria y Migracion. Solicitud de APEC Business Travel Card. https://www.extranjeria.gob.cl/media/2019/02/Solicitud-ABTC.pdf (accessed December 2019)</p>
China	<p>To be eligible, the applicant must be:</p> <ul style="list-style-type: none"> ▪ a Chinese citizen; ▪ government officials engaged in APEC affairs or government officials responsible for travel card business and Chinese officials serving in APEC organizations; ▪ managers, main business personnel and technical personnel in large state-owned enterprises under central management; ▪ local state-owned enterprise personnel; ▪ private enterprise personnel; or, ▪ Chinese (foreign) personnel in Sino-foreign joint ventures, wholly foreign-owned enterprises and Taiwan, Hong Kong, and Macao enterprises. <p>Source: Consular Affairs, Ministry of Foreign Affairs. APEC Business Travel Card. http://cs.mfa.gov.cn/zggmcg/apecshlxk/ (accessed December 2019)</p>
Hong Kong, China	<p>To be eligible, the applicant must be:</p> <ul style="list-style-type: none"> ▪ a business person residing in the Hong Kong Special Administrative Region may apply for an ABTC if s/he: <ul style="list-style-type: none"> ○ holds a Hong Kong permanent identity card and a valid national passport; ○ has not previously been denied entry to any of the participating economies; ○ has never been convicted of a criminal offence; ○ must be a bona fide business person who needs to travel frequently on short-term visits within the APEC region to fulfill business commitments. <p>Further, a bona fide business person is taken to mean a person who is engaged in the trade of goods, the provision of services, or the conduct of investment activities. It does not include entertainers, musicians, artists, or persons engaged in similar occupations.</p> <p>Source: Immigration Department. APEC Business Travel Card (ABTC) Scheme. https://www.immd.gov.hk/eng/services/visas/apec_business_travel_card.html (accessed December 2019)</p>
Indonesia	<p>To be eligible, the applicant must be:</p> <ul style="list-style-type: none"> ▪ a bona fide businessman with an equivalent position of directors and above who leads the company; and, ▪ the business entity must be in the form of a Limited Liability Company (Perseroan Terbatas) as evidenced by the Company's Business License (Surat Izin Usaha Perusahaan). <p>Source: Direktorat Jenderal Imigrasi. APEC Business Travel Card. http://www.imigrasi.go.id/index.php/info-publik/apec-business-travel-card-abtc#persyaratan (accessed December 2019)</p>

Japan	<p>To be eligible, the applicant must be:</p> <ul style="list-style-type: none"> ▪ a business person in Japan who meets the delivery requirements specified by the Ministry of Foreign Affairs in the ministerial ordinance and notice for the ABTC; ▪ must have a valid Japanese passport; ▪ there must be no false statements in the application form or other submitted documents; ▪ no criminal record; ▪ must meet one of the following requirements: <ul style="list-style-type: none"> ○ a member of ABAC, a member of the Japanese committee, a person who assists the Japanese committee; ○ a business person whose purpose is to carry out trade-related business by a manager of a company with trade or investment performance, or a person employed by the company who are required to travel to participating APEC economies; ○ staff members of the ABAC Japan Assistance Council, Japan Economic Association, Japan Chamber of Commerce and Industry, or Kansai Economic Federation. This includes those who are deemed to be required to travel to participating APEC economies for the purpose of conducting trade-related business; or, ○ traveling to participating APEC economies for the purpose of conducting business related to trade that is recognized as contributing to disaster recovery by the manager of the organization that conducts business related to trade. This includes those who are deemed necessary to travel in the same way in the future. <p>Source: Ministry of Foreign Affairs. APEC Business Travel Card. https://www.mofa.go.jp/mofaj/gaiko/apec/btc.html (accessed December 2019)</p>
Korea, Rep. of	<p>To be eligible, the applicant must be:</p> <ul style="list-style-type: none"> ▪ a person holding a Korean passport with Korean nationality; ▪ person who is deemed necessary to frequently travel for commercial purposes, such as visiting the immigration of the APEC member economy more than four times in the last two years; ▪ a person who is not prohibited from leaving Korea under the provisions of Article 4 (prohibition of immigration); ▪ executives of companies subject to card issuance and employees engaged in import, export, or overseas investment; ▪ persons without criminal history pursuant to the Penalty Act. <p>Source: ABTC. https://abtc.kita.net/reqinfo/info/cardIntroduce2.do (accessed December 2019)</p>
Malaysia	<p>To be eligible, the applicant must be:</p> <ul style="list-style-type: none"> ▪ a Malaysian citizen; ▪ members of the administration and professional, the dignitaries, senior government officials, or equivalent. Senior government officials frequently travels to the Asia-Pacific region with APEC economies must be endorsed by the Ministry or Department concerned; ▪ members of the business and investment community who has activities of trade and investment in APEC. Members of the business and investment community must be endorsed by the appointed regulatory agencies through a supporting letter; ▪ must not have a criminal record or blacklisted by the Royal Malaysian Police or the Immigration Department of Malaysia; ▪ must not be an applicant from liability (spouse or children); ▪ must not be athletes, journalists, entertainers, musicians, artists, or equivalent; ▪ must not be people who want to engage in employment or work while on vacation; ▪ must not be enterprise status companies

	<p>Source: Immigration Department of Malaysia. APEC Business Travel Card. https://www.imi.gov.my/index.php/en/apec-business-travel-card-abtc.html (accessed December 2019)</p>
Mexico	<p>To be eligible, the applicant must be:</p> <ul style="list-style-type: none"> ▪ a Mexican passport holder; ▪ with a supporting letter signed by the head of the agency of the administrative unit (public sector) or by the owner or legal representative of the company (private sector). <p>Source: Government of Mexico. APEC Business Travel Card. https://www.gob.mx/inm/acciones-y-programas/tarjeta-de-viaje-de-negocios-apec (accessed December 2019)</p>
New Zealand	<p>To be eligible, the applicant must be:</p> <ul style="list-style-type: none"> ▪ a business person engaged in the trade of goods, the provision of services, or the conduct of investment activities; ▪ New Zealand citizen with a valid New Zealand passport; ▪ need to travel frequently on short-term visits within the APEC region; and, ▪ have never been convicted of a criminal offence. <p>Source: New Zealand Immigration. APEC Business Travel Card. https://www.immigration.govt.nz/documents/forms-and-guides/apec.pdf (accessed December 2019)</p>
Philippines	<p>To be eligible, the applicant must be:</p> <ul style="list-style-type: none"> ▪ a company or business entity represented by the business person must be engaged in international trade and selling of goods or services and investments between APEC economies; ▪ must have never been charged or convicted of any criminal offense; ▪ must be a bona fide business person who is: <ul style="list-style-type: none"> ○ vested with powers and prerogatives to lay down and execute management policies in furtherance of the primary business purpose of the business entity and hold specific authority to negotiate and commit to trade and investment activities (e.g., Chairman, CEO, President, Vice-Presidents, Chief Financial Officer, regional head, and board members of a registered company); or, ○ an official nominated by the CEO, President, or Regional Head whose work is directly involved in the trade of goods, the provision of services, or the conduct of investment activities when travelling overseas. <p>Source: Department of Foreign Affairs. APEC Business Travel Card. https://consular.dfa.gov.ph/visainformation/25-visa/226-apec-business-travel-card (accessed December 2019)</p>
Singapore	<p>To be eligible, the applicant must be:</p> <ul style="list-style-type: none"> ▪ a Singaporean citizen with a valid Singapore passport; ▪ a bona fide business person representing an economically active business entity; ▪ a member of a professional body (e.g., doctor, lawyer, or accountant); ▪ a public officer representing a ministry, government department, economic agency, or statutory board travelling in their official capacity; ▪ must have no criminal convictions. <p>Source: Immigration & Checkpoints Authority. APEC Business Travel Card. https://www.ica.gov.sg/citizen/travel/citizen_travel_apec (accessed December 2019)</p>

Chinese Taipei	<p>To be eligible, the applicant must be:</p> <ul style="list-style-type: none"> ▪ a business person holding a valid Chinese passport with a national identity card number; ▪ must have frequent contacts with APEC member economies; and, ▪ must have no criminal conviction. <p>Source: Ministry of Foreign Affairs. Asia-Pacific Economic Cooperation Business Travel Card Instructions. https://www.boca.gov.tw/cp-42-8-78480-1.html (accessed December 2019)</p>
Thailand	<p>To be eligible, the applicant must be:</p> <ul style="list-style-type: none"> ▪ a business person holding a Thai passport who wants to travel for business; ▪ must have never been convicted with a criminal offense; ▪ must have never been denied entry from the territory of a participating APEC member economy; ▪ applicants must apply on behalf of a company or organization that is a member of the Thai Chamber of Commerce, the Federation of Thai Industries, or the Thai Bankers Association. <p>Source: Joint Committee of the Board of Trade of Thailand, the Federation of Thai Industries, and the Thai Bankers Association. APEC Business Travel Card. http://www.jscicb.org/th/home/apec_business (accessed December 2019)</p>
United States	<p>To be eligible, the applicant must be:</p> <ul style="list-style-type: none"> ▪ a US citizen; ▪ an existing member in good standing or be approved for membership in a US Customs and Border Protection trusted traveler program (SENTRI, NEXUS, or Global Entry) during the US APEC Business Travel Card application process; ▪ either a verified business person or a US government official who is actively engaged in APEC business. <p>Further, a verified business person engaged in APEC business means a person engaged in the trade of goods, the provision of services, or the conduct of investment activities in the APEC region. Professional athletes, news correspondents, entertainers, musicians, artists, or persons engaged in similar occupations are not considered to be verified business travelers engaged in the APEC region when they are traveling in such a capacity.</p> <p>Furthermore, a US government official means a US government official performing US government activities that support the work of APEC.</p> <p>Source: US Customs and Border Protection. US Asia-Pacific Economic Cooperation Travel Card Program FAQs. https://www.cbp.gov/travel/trusted-traveler-programs/apec-faqs (accessed December 2019)</p>
Viet Nam	<p>To be eligible, the applicant must be:</p> <ul style="list-style-type: none"> ▪ a Vietnamese business person holding a valid Vietnamese passport; ▪ entrepreneurs working in businesses related to trade, investment, and service activities with partners in APEC member economies participating in the ABTC as evidenced by business contracts, business investment projects, and specific service contracts; ▪ entrepreneurs working in enterprises represented by labor contracts, decisions on appointment of positions and full payment of social insurance premiums at working enterprises; ▪ entrepreneurs at least 18 years of age who do not have civil act capacity restrictions or who do not lose their civil act capacity; ▪ not within cases prohibited from leaving the country as specified in Article 10 of the Regulation promulgated together with the Prime Minister’s Decision No. 45/2006/QĐ-TTg of February 28, 2006 on the issuance and management of travel cards of APEC businessmen; ▪ entrepreneurs working at enterprises that have operated for six months or more;

	<ul style="list-style-type: none">▪ entrepreneurs working in businesses that comply with the laws on commerce, taxes, customs, labor, and social insurance. <p>Source: Ministry of Foreign Affairs. APEC Business Travel Card. https://lanhsuvietnam.gov.vn/Lists/BaiViet/B%C3%A0i%20vi%E1%BA%BFt/DispForm.aspx?List=dc7c7d75-6a32-4215-afeb-47d4bee70eee&ID=93 (accessed December 2019)</p>
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Source: Multiple sources cited per APEC member economy

Notes: Online content for Chile, China, Indonesia, Japan, Republic of Korea, Malaysia, Mexico, Thailand, and Viet Nam have been translated using Google's translate feature.