



**Asia-Pacific
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Summary Report of APEC GOS Private Public Dialogue on Essential Services: The Challenges of Logistics in Ensuring Supply Chain Connectivity

August 2022, Chiang Mai, Thailand

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This is a summary report on the APEC GOS Private Public Dialogue on Essential Services: The Challenges of Logistics in Ensuring Supply Chain Connectivity, which met on 23 August 2022.

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The participation of these individuals in the public-private-dialogue, or the organizations they are affiliated with, does not imply any endorsement of this report's contents, and any errors should be attributed solely to the authors.

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Abbreviations and Acronyms used in the Summary Report

APEC	Asia-Pacific Economic Cooperation
CTI	Committee on Trade and Investment
GOS	Group on Services
IMO	International Maritime Organisation
LRS	Logistics-related Services
MARPOL	The International Convention for the Prevention of Pollution from Ships
MRT	Ministers Responsible for Trade
PPD	Public Private Dialogue

APEC Members:

AUS	Australia
BD	Brunei Darussalam
CDA	Canada
CHL	Chile
PRC	People's Republic of China (China also acceptable)
HKC	Hong Kong, China
INA	Indonesia
JPN	Japan
ROK	Republic of Korea
MAS	Malaysia
MEX	Mexico
NZ	New Zealand
PNG	Papua New Guinea
PE	Peru
PHL	The Republic of the Philippines
RUS	The Russian Federation
SGP	Singapore
CT	Chinese Taipei

Summary Report of APEC GOS Private Public Dialogue on Essential Services: The Challenges of Logistics in Ensuring Supply Chain Connectivity

A Public Private Dialogue (PPD) on Essential Services: The Challenges of Logistics in Ensuring Supply Chain Connectivity was held (in a hybrid format) under the auspices of the APEC Group on Services on 23 August 2022 in Chiang Mai, Thailand, as part of the third round of APEC Senior Officials Meetings. This PPD was a part of the project on “Services to Support the Movement of Essential Goods” being led by Australia, with support from Japan, New Zealand and the United States. The initiative and the project are in response to the [2021 APEC Ministers Responsible for Trade \(MRT\)](#) commitment to “...*minimize disruptions to global supply chains...*” and to “...*work to ensure the smooth and continued operation of the logistics networks that serve as the backbone of global supply chains*”..... And to “...*enhance coordination, efficiency and transparency around transport and logistical services...*”

The Covid-19 pandemic has prompted many economies to look at ways to ensure the supply of essential goods in a crisis. But less understood are the high costs of restrictive barriers placed on essential services, i.e. those that are crucial for moving vaccines, medicines, pharmaceutical supplies and needed foodstuffs across borders. As the core of essential services, logistics services provide the oil with which the wheels of international trade are able to turn. Poor logistics services disrupt connectivity and flows of capital, trade, information and data, all of which are important in normal circumstances, and critical during a crisis. Improved logistics services are also key to uninterrupted supply chain connectivity with greater flexibility and resilience. Logistics captured the prime attention of the public during the Covid-19 pandemic and rightfully claimed the top focus of APEC's work to date under this project.

Prior to the PPD, a major evidence-based study on [“*Understanding the key role of logistics services in moving essential goods across borders in the Asia Pacific*”](#) co-authored by Sherry Stephenson and Mia Mikic was prepared for the APEC Group on Services and presented at an [APEC Workshop on Logistics](#) in March 2022. The study illustrates how better coordinated policies and reduced trade restrictions on logistics services can result in lower trade costs and resilient supply chains.

On the basis of this study and the workshop discussion, agreement by APEC members on a common set of logistics-related services (LRS) was reached in May 2022, and this definition was [annexed to the 2022 APEC MRT Chair's Statement](#) where these services were described as “...*a series of essential economic activities that enable the operation of efficient, sustainable, secure and resilient supply chains and allow for the predictable transport, storage, and delivery of goods and services for businesses*”. It is of note that APEC's agreement to the definition of a common set of logistics-related services is a first by any multilateral grouping related to trade.

Included in this definition are ten logistics-related service sectors which are:

- Customs brokerage services;
- Cargo handling;
- Storage and warehousing;
- Freight forwarding;
- Courier services;
- Distribution services; and
- Air-, maritime-, rail- and road transport services.

The PPD held in August 2022 was organized to provide the opportunity for the representatives of private sector to discuss the challenges they have faced and possible solutions in the logistics area, specifically those firms who operate on the ground, in the air and on the sea to transport essential goods in times of a crisis.

As is well known, logistics performance was strongly impacted during the Covid-19 pandemic. Significant delays in arrivals and distribution of goods were experienced by both consumers and producers, including those of essential products. Tremendous bottlenecks built up at major ports for customs procedures, unloading, warehousing and freight forwarding to final destinations. Transport costs rose significantly as many airplanes were unable to fly, and personnel and other woes plagued many maritime freight carriers. Long delays in customs processing and unloading in ports, as well as the inability of ship and air crew to transit between destinations had negative impacts on supply chain operations. The cost for a standard container shipment rose by as much as 500 percent between early 2020 and mid-2021. International trade flows were disrupted by the export and import restrictions, delays and bottlenecks experienced by transport and other logistics services and the workers who operate them. The impact was felt in shortages and higher prices of goods, including essential goods, and services, which have certainly added and continue to add to the inflationary pressures being experienced by economies in the APEC region and around the world.

As of mid-2022 there have been improvements on the logistics front. Decreases in delays and transit / shipment and cargo handling times, a revival of air passenger transport and a “normalization” of transport costs have all contributed to better logistics performance. However, those at the PPD felt that this is not the time to be complacent, as serious questions still confront the APEC region. The situation is still far from a pre-Covid-19 “normal” and doubt was expressed as to whether logistics operations will return to that (and when) or not.

Six executives from logistics companies in the Asia Pacific region and beyond made presentations during the PPD on the experience of their firms in carrying out operations during the past nearly three years of the Covid-19 pandemic. These executives were:

1. Carlos Grau Tanner, Global Express Association Delivery industry, Switzerland
2. Chris Rogers, Flexport, United States
3. Shiu-Mei Lin, UPS, Singapore

4. Oscar Hasbuin, Compania de Vapores Sudamericana, Chile
5. Pete Charionworsak, Teleport, Malaysia
6. James Sun, Shanghai International Port (Group) Ltd, Container Terminal Branch, China

Main points made by these industry executives during the PPD were the following:

- ⇒ Many challenges to logistics operations during the Covid-19 pandemic were severe and not anticipated.
- ⇒ Going forward, there will continue to be challenges; the “new normal” has changed and some of the increased costs experienced may become structural.
- ⇒ Uncertainty permeates all facets of logistics operation at present, along with a patchwork of different regulations.
- ⇒ The current situation, while improving, is still well behind levels of timeliness for air and ocean freight that were the case before the pandemic.
- ⇒ Until recently the continued high levels of consumer demand in many markets, prevented an offbeat or “down” season and no opportunity for maintenance and reset since the pandemic began.
- ⇒ Uncoordinated policies were responsible for part of the confusion and delays in customs procedures and port operations and for the different approaches taken towards the transit requirements and treatment of crew for ships and planes.
- ⇒ Greater flexibility and resilience will be key to improved supply chain operation and to meet unexpected future crises.
- ⇒ Better coordination of policies across the region towards logistics services will also be critical to bring about greater flexibility and resilience.
- ⇒ In addition to better policy coordination, APEC should continue to work towards and advocate for the liberalization of logistics-related services; greater transparency and shareability of data and information and wholesale digitalization

Specifically, industry experts discussed two main questions below, with their views summarized under each. The first question asked in the session was:

- ⇒ ***What are the most important challenges that your industry has faced in its operations during the Covid-19 pandemic and how have these challenges affected supply chain connectivity in the Asia Pacific region?***

Industry perspectives were consistent in their overall evaluation and recommendations for improvement in the performance of logistics-related services, but detailed comments varied according to the experience in each logistics sector.

- **Express Delivery Industry**

Factors that affected the express delivery industry during the pandemic and helped to create supply chain bottlenecks included the 50 percent of transport capacity wiped off because of the closure of many passenger air travel routes; port closures; lockdowns; lack of manpower; and lack of coordination among modes of transport. There was also systemic failure with both shipping and air transport capacity down at the same time.

Other express delivery chokepoints were created by a lack of coordination among governments reacting to the Covid-19 pandemic. This was most seriously reflected in uncoordinated and myopic measures taken towards treatment of professionals and workers in logistics, particularly in transport services.¹

These factors created a breakdown in networks which must be improved in the future. The Asia Pacific region could benefit from harmonization around testing and treatment and transit of air and shipping crews and health workers, where a common set of rules would be beneficial.

- [Shipping Industry](#)

Unexpected problems created by the Covid-19 pandemic for maritime transport included a heightened and high degree of uncertainty, whose impact was very strong on both people and travel. Massive injections of government funds provided incentives to people to stay home and shifted demand from services to durable consumer goods. This created huge traffic jams on the sea with around 12 percent of the fleet of the world stuck somewhere waiting to unload.

Different timing in port operations also created problems. Ships were often not allowed to dock at port with created huge delays and congestion, with containers were stuck everywhere around the world and the average time to process a container increased by 20 percent. A lack of personnel in all of the various logistics activities along with delays in customs also served to increase cost between 30 and 40 percent in all of the segments in which shipping operates. Some of these costs (such as higher salaries) are expected to remain and become structural. APEC was encouraged to keep working on this topic and to develop a common set of policies towards logistics services in times of crisis that would increase flexibility and allow markets to work better.

- [Air Transport Industry](#)

Connecting Southeast Asia end-to-end in 24 hours can only be done predominantly through air transport. In this sub-region 85 percent of the capacity to move e-commerce and goods by air is through the belly of passenger planes or belly cargo, which is the surplus space in passenger planes where cargo is transported. The biggest challenge to the air cargo transport industry during the Covid-19 pandemic was the removal of the availability of this belly cargo as a result

¹ Examples of this are crews on ships who were separated from their families for months on end, customs and health workers toiled in heat in airports in pandemic gowns; air crew experienced long waits to be tested and poor accommodations.

of passenger planes not flying, this removed around 50 percent of the air cargo capacity almost overnight, which has only partially been recovered by mid 2022. Other challenges during the pandemic were higher fuel prices and increased staffing pressures. Both have contributed to raises costs and to rising inflation.

Industry felt that the “new” normal for air transport industry operations had structurally changed. This is exacerbated by different levels of openness to trade experienced during the pandemic along with a patchwork of different regulations. Both negatively affected supply chain networks. A common regulatory framework would be very helpful for APEC governments to develop for air transport and other logistics services.

- **Port Operations / Container Industry**

Cargo ships transport 90 percent of world merchandise trade. This logistics industry faced several challenges during the pandemic: the need for more services for ships; more crew changes; greater time for customs inspections and container handling; and more internal controls to reduce risk. All of these added time and cost and required more workers.

As a result of these pressures, some ports have made progress in applying digital processes to the handling of containers to achieve savings. Examples of this are the adoption of automatic/semi-automatic container terminal services and autonomous vehicles. More processes are now done online, both when the vessels are at sea (operations concerning health requirements, etc.) and in port (booking, billing and nearly everything else). The industry felt sharing more information online with respect to the import and export of cargo and a greater exchange of information in general would improve logistics performance. The mutual recognition of ship certificates of operation was also recommended.

Challenges that will affect the logistics industry going forward include: inland bottlenecks (rail in US; strikes in UK; low water levels from climate change that have closed factories and impeded shipping); the war in Ukraine which is still causing a challenge to and increased tensions around trade flows; elevated inflation leading to high labour demands; and new environmental regulations for shipping that will require operators to run boats more slowly.

The second question asked in the session was:

⇒ *What are the main things you would like to have in place from APEC Governments to ensure smoother operation of your sector in the future? What type of regulatory reforms would be most effective in improving logistics performance?*

The shared pandemic experience by actors in logistics services enabled them to distil several clear requests from APEC Governments to ensure smoother operation in the future.

The first request refers to better Governments' cooperation and coordination of policies and regulations. Policy uncertainty is one of the main drivers of increased trade and business costs, and that uncertainty is very much correlated with the lack of coordination of the individual Government's unilateral actions and policies. Thus, it is not unexpected that the logistics industry is in favour of Governments adopting a holistic approach toward coordinating all services now recognized as services necessary to move essential goods across borders. This is the signal to APEC Governments to reenergize efforts started in 2009 with the work on APEC Supply Chain Connectivity. Furthermore, to ensure appropriate handling of future crises, there is a proposal to form coordination body(ies) which would have been able to prepare in advance possible reactions to certain shocks and would be ready to act at a moment's notice when they occur. APEC is perceived as the best multilateral body to embrace and act upon such proposal.

The second shared request is for speedier Government action on digitalization of processes related to logistics and movements of goods, services and people. This entails enacting regulation – as much as possible in accord with other Governments - to facilitate flow of commercial data across borders that enable industries to operate. Furthermore, it is necessary for public sectors to undergo digitization. There is a need for digitization by the public sector to match the effort that the private sector has been undertaking in the past few years and especially through the pandemic. There is the industry's belief that the weakest link in logistics at present is the services that Governments are supplying. Easier and fuller flows of data within and across borders will also facilitate mapping of supply chains and contribute to their resilience.

The third recommendation was related to the treatment of mobility of essential workers, not only internally but across borders as well. Many of the disruptions and delays, especially in more advanced economies, could have been partially or completely preventable if more open and trusting stances towards the mobility of workers were in place. This is one area where much more coordination and mutual recognition arrangements among Governments should be enhanced.

Lastly, a special plea was made to both industry and the public sector on sharing of information and data. The logistics supply chains are extremely complex systems, and much effort is needed to identify their weakest link. Access to more and better information would be helpful. APEC Governments can encourage industry participants to at least come together and accept a certain level of data exchange or 'shareability'. Industry owns considerable data which are useful to inform decision makers, coordination bodies, and so on (for example, broadband speeds, hotel booking rates, or credit card transaction payment volumes).

There was unanimous agreement that APEC is the best multilateral forum to build out a supply chain resilience package because the region contains important centres of both supply and demand, as well as the channels in between, namely the whole commercial ecosystem. What is missing is political will (trust) to coordinate, facilitate and to further liberalize and open up sectors which have traditionally been closed. As one speaker put it, "*in the Asia Pacific region, we have to fly everywhere across an ocean because our land connections are not good. If we*

can open up land and rail transport, that gives us additional options to make us a little bit more resilient when we fall into another situation such as we just did with Covid.”

Several other sector specific recommendations to APEC Governments are summarized below.

- **Express Delivery Industry**

Efficient delivery depends not only on infrastructure, regulation and institutions but – as mentioned several times earlier in this discussion - on availability of workers in these essential services and links to other critical vendors. The uncoordinated approaches of APEC Governments with respect to how to handle the mobility of these essential logistics workers (within and across national borders) created significant pressures on supply chains, causing some weak links to break. The same can be said about persistent restrictiveness of regulations affecting some logistics services. The adverse effect of those accentuates quality of services and other vulnerabilities in the supply chains. It was felt essential to continue services openness reforms.

- **Port Operations – Hard and Soft Infrastructure**

From lessons learned of how ports in developed countries operated during the pandemic, there are at least three requests for APEC Governments to improve on in order to better handle future crises. First, one of the weak links in the operation of the logistics chain was an (in)ability to timely re-designate the use of land around certain choke points in ports and distribution centres (for example, Long Beach port and land use around Los Angeles) making it difficult to quickly increase capacity of port operations. There is a need to adjust local rules around how land is used, for example around ports, inland connections via rail and trucks. Secondly, these changes should be accompanied by a medium- and long-term policy of increased investment in infrastructure, and greater flexibility of regulation. Thirdly, there must be more support for full digitization of trade-related paperwork as well as the regulations that support of cross border data flows.

- **Shipping Industry**

There is no doubt that the private sector has been investing billions of dollars over the last decade into increasingly sustainable capacity for maritime shipping. Unfortunately, this was not reciprocated by the public sectors in APEC economies and by their efforts to connect. As a result, this might very well be one of the weakest points in supply chains at present. Much more effort is needed to align, for example, cabotage protection rules for sea transport with adequate public sector assistance in times of unexpected congestion. One example of what could be carried out as commonly agreed policy include the lifting of restrictions to free up the traffic of cargo vessels. Furthermore, there is a need for a much more aggressive stand in the development of critical infrastructure, ports, highways, railways; there is plenty of private money available to pair with public funding. However, overregulation still hinders private

sector commitment. Sometimes, it is preferable to be humble and reserved in reaching for new regulation.²

⇒ **Conclusion**

All of the industry representatives who spoke commended APEC for its endorsement of an agreed definition of logistics-related services. Given that logistics activities are quite varied and diverse, they felt that this common definition of logistics-related services was necessary and important given that these activities all must work seamlessly together, and therefore should be discussed together as a package and not individually. Because of its interlinkages, the quality of the whole system or chain of logistics operations will be determined by its weakest component. The industry executives praised APEC for showing global thought leadership in this area and encouraged continued work toward the development of common (or at least coordinated) policies that would help with further liberalization of these services as a package.

Those present also advocated for further liberalization of this bundle of logistics-related services in order to make them more flexible, more resilient and better able to serve the rapidly changing needs of clients in the region. APEC's lead in this area could help influence the work under the WTO where industry would welcome plurilateral or multilateral negotiations on the further market opening of trade in logistics-related services. Further liberalization would be important to help withstand future shocks and crises in whatever form they may come.

Lastly, all who spoke also agreed on the usefulness of the development and adoption of a common policy framework by APEC governments for action towards logistics-related services in times of a crisis. This would go a long way towards correcting for the lack of coordination that was witnessed during the Covid-19 pandemic and that increased both cost and time and added to the uncertainty for logistics operators trying to ensure the movement of essential goods across borders.

² An example of possible coming concern with capacity of shipping industry as a consequence of them complying with the energy-efficiency regulation and carbon-footprint reduction commitments. (For example, in case of the IMO carbon intensity indicator which will be a mandatory measure under MARPOL annex six, which comes into force in 2023. Alignment to this might take away 10 percent, up to 15 percent of the fleet of the world in a very short period of time. It's not disappearing due to scrapping of the vessels, but because the only way to comply will be to reduce the speed which will increase the transit time on one end, but also there will be demand for more vessels to ship the same cargo. So that might create a huge shortage of vessels.)

Annex: Agenda of Essential Services GOS Private Public Dialogue



GOS Private Public Dialogue (PPD) on Essential Services: The Challenges of Logistics in Ensuring Supply Chain Connectivity

Tuesday 23rd August 2022, Chiang Mai, Thailand (10:00 to 12:30)

Melia Hotel, Khom Room, Chiang Mai

10:15 - 10:30 Registration and Arrival (limited virtual participation) (15 minutes)

10:30 - 10:40 Welcome Remarks (10 minutes)

Ms. Christine Schaeffer, DFAT, Australia

The Public Private Dialogue (PPD) will highlight the role and various functions that essential services play in enabling APEC's pandemic response to move vaccines, medical equipment, and pharmaceuticals across borders through ensuring efficient and resilient supply chain connectivity.

The PPD will also discuss the question of how APEC can best carry forward future work on logistics-related services as key component of essential services, building upon the common definition of logistics-related services endorsed by the GOS and the CTI, and adopted by APEC Ministers Responsible for Trade in their May 2022 meeting (Annex A to the MRT Chair Statement).

10:40 - 12:00 Session 1: Examining the challenges faced by firms who operate in various sectors of logistics-related services (80 minutes)

In the 2022 APEC Ministers Responsible for Trade Statement of Chair (Annex A) APEC economies endorsed a common definition of Logistics-related Services, describing these as ".....a series of essential economic activities that enable the operation of efficient, sustainable, secure and resilient supply chains and allow for the predictable transport, storage, and delivery of goods and services for businesses". Included in this definition are ten logistics-related service activities, including:

- Customs brokerage services;
- Cargo handling;
- Storage and warehousing;
- Freight forwarding;



- Courier services;
- Distribution services; and
- Air-, maritime-, rail- and road transport services.

This session is focused on obtaining the perspective of executives from four of these sectors, including express delivery, shipping, air transport and port operations, following a general outlook on the current challenges to logistics operations.

Moderator: Dr. Sherry Stephenson, Consultant, APEC Essential Services Project; Member of PECC Services Network

Setting the stage:

Carlos Grau Tanner, Director General, Global Express Association, Geneva

⇒ View of the **Logistics Industry on APEC work in this area**

Chris Rogers, Principle Supply Chain Economist, Flexport, United States

⇒ General outlook on **Current Challenges to Logistics Operations**

Industry Perspectives:

Shiumei Lin, Vice President, Public Affairs and Sustainability, United Parcel Service (UPS) Asia Pacific Region, Singapore

⇒ For the **Express Delivery perspective**

Oscar Hasbun, Chief Executive Officer, Compania Sudamericana de Vapores, Santiago de Chile

⇒ For the **Shipping perspective**

Pete Chareonwongsak, Chief Executive Officer, Teleport, Capital A Berhad, Malaysia

⇒ For the **Air Transport perspective**

James Sun, Deputy General Manager, Shanghai International Port (Group) Ltd, Container Terminal Branch, China

⇒ For the **Container Port Operations perspective**

The views of the panelists will be sought on the following questions:

1. *How important are logistics-related services for the movement of essential goods in the APEC region, especially those needed to combat the Covid pandemic and to ensure an ongoing economic recovery?*
2. *Serious bottlenecks have occurred in the logistics activities that have hampered supply chain connectivity in the APEC region and have resulted in significant*

market disruptions. What has contributed to these bottlenecks from your point of view, and how costly have they proven to your operations?

- 3. What are the main things that you would need in place to ensure smoother operation of your sector? For example: lower barriers to transport services? Greater access for temporary workers in air and sea crews? Improved access to storage and warehousing?*
- 4. From the perspective of your sector, what are the main regulatory reforms you would ask from governments in order to allow logistics to better play its key role in supply chain connectivity? For example, a harmonized or common approach to key regulations in the APEC region? If so, which ones?*

Discussion with panel and participants

12:00 - 12:20 Session 2: Proposing a “Logistics Tracker” to assist APEC economies to have a better understanding of the link between policy and performance for the Logistics-related services in Annex A of the 2022 MRT Statement of Chair (20 minutes)

Presenter: Dr. Mia Mikic, Consultant, APEC Essential Services Project; Member of PECC Services Network

As part of the next steps for the APEC project work on Essential Services, particularly logistics-related services, the 2022 APEC Ministers Responsible for Trade in their 2022 Statement of Chair (Annex A), stated that the definition of logistics-related services is for the purpose of “.....facilitating further discussion and to assist APEC economies to have a better understanding of the impact of these services sectors on the movement of essential goods”.

To fulfill this mandate, this session will discuss the adoption of a “Logistics Tracker” that will provide a means to track the policies adopted by APEC economies for the ten logistics-related services and the performance of the same, providing an important means of evaluating how well APEC is doing in this area critical to supply chain connectivity.

Q & A with participants

12:20 - 12:30 Wrap-up and Next Steps (10 minutes)

Ms. Christine Schaeffer, DFAT, Australia

The closing session will draw out some main conclusions from the PPD and highlight the next steps in the Essential Services Project aimed at helping to achieve better-informed logistics policy and more efficient logistics functioning in APEC.



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